RETHINKING OF EDUCATION AND TRAINING FOR TOURISM

Edited by

Boris Vukonić
Graduate School of Economics & Business, University of Zagreb
and
Nevenka Čavlek
Graduate School of Economics & Business, University of Zagreb

Zagreb, 2002
Welcome

It is a matter of personal honour to me to say a few introductory words and express my sentiments of gratitude to all who are attending this Conference in Zagreb – a city with glorious past in the promotion of culture, education and imparting training for over half a millennium.

Further, it is my proud privilege to be able to extend to you a warm welcome and greetings at the eve of this international conference on the “Rethinking of Education and Training in Tourism”. I am proud that this Conference marks the 40th anniversary of imparting knowledge and training to generations of young and adults alike in specific fields of tourism at the Graduate School of Economics and Business, Zagreb. The process started with a modest course at undergraduate level in 1962. Already in 1968 the first generation of candidates for a Master’s degree in Economics of Tourism was underway. In early 1970s a number of Ph.D. degrees were awarded to those specialising in Tourism. The School through 1980s and 1990s has earned itself an international reputation as the seat of imparting higher education and training to people working in tourism. Today, the School is a WTO accredited institution of higher learning with an internationally reputed faculty, respectable number of recognised pieces of scientific literature, and an internationally reputed specialised scientific journal – the Acta turistica. In a word, I can say that, today, we do matter in creating and dispersion of knowledge in tourism.

In 1987 we had had the first international conference on tourism at our School. Now, it is almost after 15 years that we are holding a similar session, the central theme of which is to review the process of education and training of tourism. I am sure, you, ladies and gentlemen, with your deliberations will help us not only to rethink, but also to foresee the problems and perspectives of education and training human resources for tourism in a global economic world.

I sincerely welcome you and wish you fruitful discussions and a pleasant stay in our city and at the School.

Thanking you.

Soumitra Sharma
Dean
Graduate School of Economics and Business
Acknowledgments

The Graduate School of Economics & Business and its Department of Tourism, would like to express their most sincere appreciation to all keynote speakers, moderators and paper presenters for joining us in Zagreb to celebrate 40 years of Education and Training for Tourism at our School.

Conference Program Committee:
Prof. Boris Pirjevec, Ph.D.  
Prof. Boris Vukonić, Ph.D.  
Prof. Miljenko Bilen, Ph.D.  
Prof Nevenka Čavlek, Ph.D.  
Prof. Darko Prebežac, Ph.D.

Conference Secretaries:  
Ivica Čačić, M.Sc.  
Oliver Kesar, M.Sc.

The Conference Paper Review Committee:  
Prof. Nevenka Čavlek, Ph.D.  
Prof. Boris Vukonić, Ph.D.  
Prof. Boris Pirjevec, Ph.D.  
Prof. Đurđana Ozretić Došen, Ph.D.  
Prof. Mia Mikić, Ph.D.  
Prof. Darko Prebežac, Ph.D.
# Content

## Welcome

Tourism at the Graduate School of Economics and Business, University of Zagreb 1962 – 2002

*Boris Vukonić*  
1

## Growth and change in tourism education

*David Airey*  
13

## Leading University Academics in Hospitality Management Research

*Stephen Ball*  
23

## The relationship between employment and tourism education: issues for debate

*Adele Ladkin*  
45

## The GNVQ in leisure and tourism: investigating student perspectives

*Philip Gibson*  
57

## Globalisation of education and culture: a study of a fledgling supplier

*Kevin Nield*  
67

## Globalisation and culture: new training requirements for tourism

*Andrea Macchiavelli*  
79

## Setting the stage: a global curriculum for tourism – a proposed curriculum

*L. Steynberg, E. Slabbert, M. Saayman*  
89

## Education as a factor of efficiency in tourism

*Zoran Jašić*  
103

## Ecotourism development - principles and content for this instructional offering

*Coetzee, W.J.L. (Willem)*  
111

## Assuring quality in tourism and hospitality management education

*Ivanka Avelini Holjevac, Vidoje Vujić, Mustafa Prohić*  
121

## A total quality approach for excellence in tertiary tourism education: the TEEQ model

*Evangelos Christou*  
135

## The development of constructs for the evaluation of academics teaching tourism: an exploratory study using Q-Methodology

*Dimitrios Stergiou, David Airey, Michael Riley*  
149
The context of academic leadership in the development of high quality hospitality and tourism courses
Susan Horner 167

Academic leadership for the international development of hospitality and tourism management education - a case study of distance learning in Hong Kong
Kevin Nield, Stephen Ball, Susan Horner 181

Training principles and training methods in tourism
Liljana Prangoska 191

Some of the more important methods of training and staff development as a factor for improving operations in a tourist enterprise
Lidija Simonceska 197

The use of the case method for effective education and business training
Đurđana Ozretić Došen 205

Tourism sandwich placements revisited
Graham Busby 213

A system dynamics approach to experiential learning in tourism
Mirjana Pejić Bach 231

Virtual tourist marketplace an approach to experiential learning
Višnja Špiljak, Darko Prebežac 243

Staying up to date with information techniques and information technologies in tourism vocational education - The reform of school programmes for catering and tourism in Slovenia
Vesna Loborec 253

Tourism education and training programmes regarding the specific needs of the SME sector in Slovenia
Sonja Sibila Lebe 259

A marketing approach to catering oriented personnel education
Marcel Meler, Drago Ružić, Jure Kuprešak 277

What you should know about liberalization in tourism?
Mia Mikić 293

Using the Internet for complementing and enhancing the teaching of tourism and hospitality education: evidence from Europe
Marianna Sigala, Evangelos Christou 311

Internet in tourism and hospitality education: towards the development of an e-learning model
Marianna Sigala 325
Web-based education and training for tourism: the promising option
Zeljko Panian 347

Teacher's digital assistant
Zvonko Kribel 361

E-travelling: a generic paradigm for developing tourism web sites
Fotis Lazarinis, Stefanos Stefanidis, Ourania Kougiourouki 369

Entrepreneurial culture - does education matter? A tourism industry case study
Matthias Fuchs, Mike Peters, Klaus Weiermair 381

The Role of Foreign Languages Instruction in Minimising Communication Breakdowns in Tourism
Vera Krnajs Hršak, Nina Liszt, Nevenka Ćavlek, 399

The influence of vertically integrated travel concerns on education and training in tourism
Nevenka Ćavlek 411

An analysis of skills required for selected sectors of the tourism industry
M. Saayman, S. Geldenhuys 419

Tourism education and training of professionals in sport
Mato Bartoluci, Hrvoje Maršanić 431

Proper candidate selection for participation in tourism animation training at Turistica-College of Tourism
Tadeja Jere Lazanski 441

The position of tourism education at the Graduate school of Economics and Business in Zagreb compared to selected undergraduate tourism education in Croatia and abroad
Oliver Kesar, Dubravka Frajlić, Nina Pološki 453

Education of tourist workers in the republic of Macedonia
Gabriela Rakicevik 467

Privatization of higher education: Jordan’s success story
Khalid Magablih 473

The postgraduate programme in tourism of the Greek Open University: characteristic features and implementation
Paris Tsartas, Gerasimos Zacharatos 481

Tourism education and training in schools – What Israeli students think of it?
Alon Gelbman 489

Internationalisation of a tourism education programme. A look at the Faculty of economics, University of Ljubljana, Slovenia
Tanja Mihalić 503
Tourism at the Graduate School of Economics and Business,
University of Zagreb
1962 – 2002

Boris Vukonić, University of Zagreb

HOW IT ALL BEGAN

Every beginning has its reasons. Sometimes these reasons should be sought in more immediate surroundings, and sometimes over a wider sphere. Some reasons are stronger and some less strong, but whatever they are, they are always interwoven in some kind of beginning. Every beginning has its ideological leaders, its advocates, without whom there would not be these beginnings, no matter how many reasons there are, as has been shown by the entire history of the human race to date. This historical experience has been repeated in the case of the beginnings of the education of personnel for tourism, which was initiated at the Faculty of Economics in Zagreb in the sixties of the last century. This is a continuous process which, in our firm opinion, will continue into the future.

The reasons definitely lie in the more serious awakening of tourism in Croatian regions in the second half of the twentieth century, which did not take place merely as a result of our own desires. Indeed, that was the period of Europe's emergence from an economic crisis caused by the devastating effects of World War II. From a tourism standpoint, two important phenomena accompanied this emergence: general economic progress which also led to an increase in the standard of living in the majority of European countries and a larger amount of leisure time in which people could fulfil their wishes. One of these wishes, strengthened by the previous inability or impossibility to move freely over a wider area during the Second World War, definitely involved relaxation by travelling. Thus, two of the most important prerequisites for the development of tourism took place as early as the middle of the twentieth century, just fifteen years after the end of the war. The consequences of tourism were strongly felt not only across the whole of Europe but also across other parts of the world, particularly in regions which were on the side of the victors during the war, in other words, in those parts that were not badly devastated in the war. The Croatian regions, which had already been viewed as attractive tourist destinations before the war, had to wait for their tourism revival for a longer period due to the general political and economic situation in the former state. Still, prompted by a universally rising tide of interest in tourist travel, European tourists were among the first to head for the Adriatic coast. This external factor proved to be much stronger than any internal incentive. Admittedly, the situation in which the general rebuilding of the country badly devastated by the war took prime place did not leave much space for dwelling on one's own tourism potentials and on the possible contribution of tourism to the renewal of the country.

1 Vice dean, Graduate School of Economics & Business, University of Zagreb, J.F.Kennedy Sq. 6, 10000 Zagreb, Croatia
Telephone: +385 1 238 3333, Fax: +385 1 233 5633, E-mail: vubor@efzg.hr
In 1952 the Croatian tourist destinations finally saw the return of European tourists. According to Croatian tourism theoreticians, "the period up to 1960 could be viewed as the beginning of the postwar development of tourism in our country".\(^2\) The Faculty of Economics, fully aware of the coming changes, made a decision as early as 1954 to include several tourism-economic topics into the course in Commerce. As there were not enough lecturers with adequate knowledge or interest in this subject matter from their own ranks, Dragutin Alfier, B.Sc., was engaged as part-time lecturer in this field. That is how, in a quiet manner, tourism entered once and for all the Croatian Temple of Economics.

A more massive arrival of foreign tourists, which, as well as physical growth, also brought about significant economic effects, took place in the next twenty-year period. This was mostly due to the fact that in 1963 foreign guests from the countries with which ex-Yugoslavia had diplomatic relations were no longer obliged to obtain entry visas for our country\(^3\). Not being used to such significant economic impacts from any other sector outside industry, the effects of the above-mentioned indicators of tourism development were full of surprise and led even to disbelief. Nevertheless, the political establishment had many reasons to support such a course of development. Some of these reasons lay in domestic economic circumstances, where the rate of employment was still relatively low, and tourism provided a chance for many to get a job. Besides that, the long experiences of some European countries showed that the development of inward tourism brought foreign currency into a country, and ex-Yugoslavia was constantly showing a foreign currency deficit. It should also be pointed out that the obvious lagging behind of some parts of the country in terms of development, which might have had undesirable economic and political consequences, could be neutralised, or at least minimised, through tourism.

The second set of factors which contributed to the country's awareness of the benefits of tourism development ensued from external conditions and relations that governed the international political scene. Yugoslavia of the time, recovering from the grave effects brought on by the political crisis involving its relations with the USSR and the countries of the socialist block, was forced to open up towards the West, and tourism provided a realistic opportunity for this. It was possible to open up towards the West without jeopardising the canons of the ruling socialist doctrine, although it was hard to include tourism, as a tertiary sector, in the persistent arguments revolving round the advantages of one's own economic standpoints. Tourism also provided some countries, which were fast becoming Yugoslavia's potentially important economic partners, with the opportunity to gain a better understanding of the political views of the regime of that period. Opening up towards the world, facilitated by the development of tourism, also corresponded to the policy of non-alignment current at that time, which was gaining recognition on the international scene.

It is therefore logical that in view of the growing interest of foreign tourists in Croatia as a tourist destination, several experts began to regard tourism as one of the economically important sectors for Croatia. These experts were economists by vocation, but they did not belong to any group of established economic theoreticians or scientists. Rather, they drew on their own practical experience in tourism to write about tourism, analyse the results of tourism development in Croatia and other regions and debate the role of tourism in the economic and general life of a given area. The issues gradually broadened to include the problem of educating personnel for tourism. Some sporadic warnings to this effect came from the circles of the Chamber of Commerce in particular.

\(^3\) Boris Pirjevec, ibid, p. 34.
However, as is usually the case in everyday life, the proper initiative came from one person only, a person who was already established in the economic sphere and whose reputation and position in academic circles guaranteed that such an idea could be put into practice. On the initiative of Professor Mijo Mirković, Ph.D., the Nestor of Croatian economic science and a world-renowned economic expert, scientist and university professor, the Faculty of Economics passed a decision in 1961 to establish a postgraduate study entitled Tourism Economics. Professor Mirković wrote the very first outline for this future course of study. This event was very important for two reasons: this was the first time in Croatian history that a higher education institution had decided to organise a postgraduate study in Tourism Economics. Along with tourism, the faculty also established a postgraduate study of the communal system (Ekonomika komune / Communal economics).

The outline that Professor Mirković drew up for the postgraduate study of Tourism Economics bore the title “Ekonomske teze ekonomike turizma” (Economic Theses in Tourism Economics). This outline is a kind of rare example, showing the professor’s amazing erudition which, by the way, had been demonstrated so many times before; it also represents a historical indicator of the state of our cognition and comprehension of tourism matters of that time. Professor Mirković divided the content of the envisaged course of study into 18 fundamental topics (chapters), 5 additional topics and 2 topics for seminar exercises. The content of the basic themes was particularly interesting, because, in addition to the otherwise usual themes that deal with tourism and its economic aspects, Professor Mirković, even at that time when very little was said on tourism, and let alone discussed in the circles of Croatian economic theoreticians, stated that the “central problem of tourism economics are the costs of tourism”. He demanded that the courses at the postgraduate study of tourism economics include “the effectiveness of capital invested in tourism”, “the impact of tourism on the change in production and on the professional structure of the population”, and “the influence of currency exchange rates in tourism”. He also did not forget “the competition between countries in tourism.” A certain peculiarity in his work is his thesis about “the light and darkness of tourism”, which he had conceived 12 years before George Young’s famous book “Tourism: Blessing or Bight?” Indeed, Young’s book marked a starting-point for discussion on the negative aspects of tourism development in the world.

"The first cycle of lectures in the course of Tourism Economics in the 3rd cycle of the Faculty of Economics in Zagreb", as documented by Ždenka Devčić, then a junior lecturer at the Faculty of Economics who attended the "cycle", was held "in the period between 1 March 1962 and 15 January 1963". A total of 34 students enrolled in the postgraduate study, and this marked the beginning of a systematic treatment of tourism at the Faculty of Economics in Zagreb. The majority of the participants were graduate economists, but there were also about ten undergraduate students from the School of Economics (who graduated within the first few months of the postgraduate study) who had special permission from Professor Mirković. Besides these students, there were also geographers, lawyers, philosophers and other specialists. Most of the participants already possessed some experience in tourism, and some of them had already been employed in the tourism sector for several years.

Along with Professor Mirković, there were other people who also helped to realise this study. They were: Professor Ivo Žuvela (who recorded Professor Mirković’s theses), Mr

---

Vladimir Blaškovic, Mr Josip Roglič, Mr Martin Dobrinčić, and the group of the best known tourism experts: Mr Dragutin Alfier, Mr Ivan Antunac and Mr Srđan Marković. During the initial planning of the curriculum, a serious confrontation arose among the different conceptions, until finally the one Mr Dragutin Alfier and Mr Srđan Marković designed in February 1961 prevailed. This duo elaborated “An Outline for the Postgraduate Course of Study at The Faculty of Economics of the University of Zagreb”. In its 24 pages they presented the course of study which, in 8 independent components, elaborated the phenomenon of tourism. These components were: basic concepts of tourism, tourism as a space and geographical phenomenon, the general economic concepts and consequences of tourism, the economic particularities of economic subjects in tourism, tourism policy, tourism statistics, economic and environmental planning, and legal issues in tourism.

Shortly after the presentation of this programme, Mr Ivan Antunac produced his own “discussion material” covering 36 pages, which consisted of comments on the proposed programme, and a widely-elaborated explanation of his standpoints. Prof. Antunac made a number of critical remarks on the proposed postgraduate curriculum, using as arguments some theoretical theses from which, in his opinion, a different teaching curriculum could be developed. Professor Antunac further elaborated these theses in later years. The most important of them are: misunderstanding of the notion of tourism in the past, defining the concepts of the “factors” and “material basis” of tourism, the scientific justification of the syntagms “tourism firm” and “tourism geography”.

For this postgraduate study, lectures were given by a number of experts, but there were also about twenty lecturers who were new in this field and who were still gaining their scientific reputation in tourism. Among the first group, together with the already mentioned professors, were Mr Vladimir Pertoto, Mr Josip Seissel, Mr Rudo Petrović, and, of course, Professor Mijo Mirković himself, who lectured on the “introduction into the methods of scientific research”. The second group was composed of the already mentioned Mr Alfier, Mr Antunac and Mr Marković, along with Mrs Neda Andrić, Mr Krešimir Car, Milan Mazi, Mr Žarko Mrkušić, Mr Jaroslav Navratil, Mr Dušan Nejkov, Mr Milovan Nešić, Mr Janez Planina, Mr Branko Vegar, and Mr Mirko Verlandi. There were also many others who lectured only on selected topics. The lectures covered 2 semesters, after which came the 3rd semester which was devoted to preparing the Master’s thesis. Once the lectures were over, all students had to pass the final examination embracing all the topics that had been covered in the lectures. Only after they had passed this final exam were the students allowed to defend their thesis for the Master’s degree.

At the beginning of February 1963, the Faculty Council of the Faculty of Economics established a special board of examiners. This board consisted of Professor Ivo Žuvela, Ph.D., vice dean of the School of Economics and leader of the postgraduate study, who was appointed president; Dr Krešimir Car, vice secretary in the commodity trade sector of the Socialist Republic of Croatia, member; engineer Dragutin Alfier, senior lecturer at the Faculty of Economics in Zagreb, member; and Dr Srđan Marković, director of the Bureau of Tourism-Catering Expansion in Zagreb, deputy member. A total of 29 candidates took the examinations in the first examination term (of whom six were not successful), and 9 candidates sat for the examinations in the second examination term (including 5 of those who had failed in the first term). This means that in the first two examination terms, all but three postgraduate students passed their exams. This great success of both students and lecturers, as well as the efficiency of the organisation and the organisers of the postgraduate study, gave a strong impetus to the Faculty to continue the course and to engage more generally in the field of tourism.
So, it was in 1963 that we gained the first Masters in tourism: Bojana Tomašević, Berislav Polšek, Augustin Franić, Veljko Marčić, Ivan Matijević, Boris Jurčić, Zdenka Devčić, Ante Stipančić, Vera Grunden, and Marijan Racan.

Many took an interest in this study, especially people working in tourism throughout the country. This not only meant that individuals could have additional specialised education, and were allowed to win a doctoral degree in tourism, but it also gave tourism a new dignity, and certainly gave the possibility for a regular, four-year study of tourism to be organised not only at the Faculty of Economics in Zagreb, but in other degree-awarding educational institutions in the country. As Professor Srdan Marković, one of the lecturers in the above-mentioned study, later wrote, “The crucial significance of this study was that it set tourism as a priority in postgraduate education which, together with the possibility of winning a doctoral degree in tourism, completed a broad scale of education in tourism”.

The events that followed confirm these statements.

The first doctoral candidate at the Faculty of Economics who won a doctoral degree in tourism was already a well-known and acknowledged tourism expert in Slovenia and former Yugoslavia, Milan Mazi. He was awarded the title of doctor of tourism just after lectures on tourism had begun at the Faculty, so this doctorate had a special meaning in the sense that it fully confirmed the place of tourism as a scientific field at the Faculty itself and even outside it. Mr Mazi’s doctoral thesis was entitled “Foreign tourism and its role in the economic development of Yugoslavia”, and was awarded on 24th December 1965. He was registered in the Book of Doctors of Economics under the number 131. In 1972 Dr Mazi wrote “Tourism Economics” (“Ekonomika turizma”), the first book on this topic in the country. Later in the same year, Zore and Srdan Marković wrote a book under the same title, which was published in Zagreb.

After the first postgraduate study was completed, the Faculty made two important decisions for its future presence. First, another course of postgraduate study for the second generation of students was to be introduced. This was realised in 1965 under its already traditional title “Tourism Economics”. Second, it was decided that Professor Dragutin Alfier, one of the doyens of Croatian tourism theory, should become a permanent lecturer at the Faculty. Therefore, “Tourism Economics” became an optional subject in the fourth year of regular study, which, according to some people, marks the “real” introduction of the subject of tourism at the Faculty of Economics in Zagreb.

Professor Alfier personally elaborated the organisational parts and the outline for the second course of postgraduate study in his edition called “Tourism Economics – Organisation and Outline for Teaching Third Cycle Students”. This is a very valuable document, which shows the author’s wide knowledge of the theme of tourism, the state of tourism in our country at that time, and modern understanding of tourism in the world. According to Professor Ivan Antunac, “this publication represents…the most complete tourism documentation and bibliography published in our country until then”.

“From 1966 on, tourism was given a special place in documents in which the future of our country was planned. The time that follows, therefore, is of great importance for its

---

5 In «60 godina Ekonomskog fakulteta u Zagrebu», Zagreb, 1980, pp. 422-423.
future development. Tourism becomes a priority in our economic development”. This naturally influenced the organisation of the education of tourism personnel. In the academic years of 1967/68 and 1969/70 the new generations of postgraduate students enrolled in the postgraduate study of tourism. This continued in the following two years, which resulted in the growing recognition given to the education of personnel for the needs of the special sectors of tourism. This was also encouragement to other sectors and scientific fields to introduce postgraduate studies.

In “Tourism Economics — Organisation and Outline for Teaching Third Cycle Students”, written in December 1969, it is clear that we are dealing with “a postgraduate study for scientific improvement” consisting of a total of 870 hours of lectures, seminars and consultations (out of which 220 hours were reserved for lectures only); that the study still took two years to complete; that the head of the study was Professor Dragutin Alfier, who had already been nominated a full professor at the Faculty; and that the teaching programme had been considerably improved since the first postgraduate studies. More subjects on tourism topics were introduced and were also presented in a more detailed manner; the whole teaching programme was divided into “lectures on scientific topics” and “lectures on professional topics”. The subject “Business in Tourism and Its Analysis” was specially elaborated in five one-semester disciplines. The stress of the whole study was “on the systematic and profound study of economics and the issues of tourism development and the analysis of business on tourism as well as on the methodical and practical introduction of scientific work and research in the field of tourism”. The whole course was centred on the “Systematic and profound study of economics, the problems of tourism development, and the analysis of tourism business, with attention given to the methodological and practical introduction of participants into scientific-research activities in the field of tourism”.

The results of these pioneering steps in higher education targeted towards the needs of tourism were reflected in other centres as well, particularly university centres, where different forms of education for the needs of tourism were modelled on the Zagreb Faculty of Economics. In Opatija, in the Department of Catering of the College of Economics, and in Dubrovnik at the College of Tourism, courses in tourism were expanded to include new contents, thus gaining more weight in the overall teaching plans and programmes. Graduates with Master’s degrees from the Faculty of Economics in Zagreb soon became respected economists in hotels, tourist agencies and catering firms. They were also engaged as teachers of tourism subjects in secondary schools and colleges, became professional associates in the Institute of Tourism (then called the Bureau of Catering-Tourism Expansion), in the Republic Institute for Planning, in the Board of Tourism and in other state bodies and institutions”. As Professor Marković stated: “It should be stressed that the postgraduate study in Zagreb has grown into an important expanding source of personnel. A good example is the fact that this very supply has enabled the Institute for Tourism in Zagreb (primarily by working with graduates with Master’s degrees in tourism from the Faculty in Zagreb) to gradually grow from a small institution with only a few experts into a strong and unique tourism-orientated scientific institution…”.

---

8 Boris Pirjevec, ibid, p. 44.
10 S. Marković, ibid, pp. 283-284.
TURBULENT DEVELOPMENT

Since many positive results from the postgraduate study of tourism had been recorded, in 1970 the Faculty of Economics in Zagreb (called at that time The Faculty of Economic Sciences) decided to spread its educational initiative in the field of tourism outside Zagreb, to Dubrovnik. There it founded its Department for Tourism and Foreign Trade, which in 1973 joined the University of Split as an independent Faculty. The next year, the College for Foreign Trade, which in the following decade merged with the Faculty of Economics, in association with those educated in the postgraduate study at the Faculty of Economics and the “Mijo Mirković” College of Economics from Pula, introduced a regular two-year study of tourism. Such rapid and successful steps in the field of educating tourism personnel prompted other institutions of higher education in other centres of the former state (Ljubljana, Belgrade, Ohrid) to focus on educating personnel needed in tourism. Now we can see how correct the statement was that the introduction of a postgraduate study in tourism at the Faculty of Economics in Zagreb “was not just a flash in the pan, but marked the beginning of a continuous system of education at this level, which with its development and continuous self-improvement always pursued increasingly complex problems of tourism and the profound transformational processes in it”.11

The second doctorate in tourism was awarded in 1972. The new doctor of tourism was Mirko Bunc, and his doctoral thesis bore the title: “The Theoretical and Methodological Approach Towards the Research of Tourist Consumption as an Integral Part of Tourism Market Research”. This was the time of radical changes in the theoretical understanding of tourism in our country and of the practical application of these changes. From the present position, it seems almost incredible that this was the period in which the importance of the market in tourism, of tourist consumption and of the consumer, and finally of marketing and its possible application to tourism, was felt only for the first time. During 1973, Zdenka Devčić, then a lecturer at the Faculty of Economics, became the third candidate in the history of the Faculty to defend her doctoral thesis on tourism. She was also among the first generation of postgraduate students to have earned a Master's degree in the postgraduate study of Tourism Economics at the Faculty of Economics in Zagreb.

The concept of postgraduate study in the subject "Tourism Economics" did not change in the year 1974. Regrettably, neither then nor later did the concept of a general study at the Faculty of Economics change in such a way as to include more specialist knowledge in the basic undergraduate study. Defended by many eminent Faculty professors, this concept steadfastly advocated the so-called macro approach, the idea that future economists should acquire general economic knowledge in undergraduate studies, and specialist knowledge in postgraduate studies. For this reason, until 1979 issues dealing with the field of tourism were taught only within an optional subject in the fourth (final) year of undergraduate study. The neighbouring Higher School of Foreign Trade in Zagreb adopted a more flexible, and from today's standpoint, more modern approach to the study of economics, which was followed by other educational institutions in Croatia: the Faculties in Dubrovnik, Split, Rijeka, Pula and Opatija.

It was not by accident that events took such a turn. Almost every document on the planned development of the economy in our country at that time considers tourism as “an activity especially important for the realisation of the policy of the general development of

---

11 S. Marković, ibid, p. 283.
the country…"12 Naturally, the focus was still on the development of foreign tourism. It should be pointed out in this context that such a rapid and successful development of tourism, which approached the levels of development in other medium-developed and even highly developed countries in the world, necessarily had an impact on the general policy of education for the tourism industry and on the policy of higher education targeted towards tourism needs. Relatively late compared with other institutions of higher education in the country and with the concrete needs of tourism practice, and I would say, accepted rather reluctantly by the majority of the teaching staff who were not at all convinced of the necessity of such a step, the Faculty of Economics finally introduced a new catering-tourism course as one of the options in the last two years of the four-year general undergraduate study. It was the lack of a true conviction for such a study that prevented this course and the department itself from taking firm roots at the Faculty of Economics. However, the very announcement of the introduction of this course aroused keen interest among students, despite the fact that of the ten subjects formally listed as specialised subjects, only one actually dealt with tourism (The Economics of Tourism and Catering).

Such formal “coordination” with the needs of the economy and with tourism development did not have the effect of encouraging the Faculty to theoretically elaborate the tourism policy of the Republic of Croatia at that time. There was only one person who was active in this field – Professor Dragutin Alfier, but that was not sufficient to affirm the Faculty according to its true scientific potentials, let alone to actively involve it in the processes of education and especially of research in tourism in Croatia. It should be mentioned that he had introduced the study of tourism at the Faculty and had been almost the only person who had faith in it for all that time. In 1975, Professor Alfier was finally granted the title of doctor of economics in the field of tourism. His doctoral thesis was entitled “Protection of Nature in Tourism Development”. He was the fourth doctor of economics in the field of tourism to be awarded a doctoral degree at the Faculty of Economics in Zagreb.

From 1978 to 1982, lectures on tourism topics were excluded from the independent postgraduate study at the Faculty of Economics. The whole educational postgraduate programme was organised in two fundamental courses. The so-called B course entitled “Development Policy of Particular Areas of Public Work and Regional Development” also included a course in “Tourism and Catering”. Still, we regard this as a period where studies designed for the needs of tourism were to a certain extent degraded and impoverished in comparison with the level reached so far. This was probably one of the reasons why the study was abandoned for a short while.

A more substantial change in the treatment of tourism at the Faculty of Economics as an economic sector worthy of scientific interest took place after the merging of the Faculty with the Faculty of Foreign Trade in 1982. In this way, the two-year and four-year studies of tourism that were established and developed at the Faculty for Foreign Trade became part of a regular study programme at the now united Faculty of Economics. The fresh staff teaching tourism now gave keen encouragement to the Faculty to proceed with the activity of tourism research and improving tourism personnel. This also resulted in the re-introduction of the postgraduate study with an improved educational programme and with new lecturers. Particular mention should be made that it was from this time that the Faculty of Economics incorporated tourism issues into both its undergraduate programmes (at the two-year and four-year study) and organised lectures within the special course of "Tourism" (at one period entitled "Tourism and Catering"). The basis of the educational pro-

12 Boris Pirjevec, ibid, p. 46.
gramme of this course from the academic year 1983-84 until now has been the following subjects: “Tourism Economics”, “Tourism Geography”, “Economics and the Organisation of Tourist Agencies”, “Economics and the Organisation of Hotel Management”, “Marketing in Tourism”, “Commercial Law in Tourism” and “Regional Planning in Tourism”.

After 10 years, at the request of the Faculty of Economics made on 9th July 1984, the University of Zagreb allowed the Faculty to restore its postgraduate study in Tourism Economics with its new head, Dr Boris Vukonić. The Faculty explained its request by recalling the social function of its education in economics and its tradition of enabling its students to better understand international development through economics. “The need for the re-establishment of such a postgraduate study is stressed by the complex conditions of business transactions on the international tourism market, which always demand more complex knowledge of the tourism phenomenon as well as of the tourism market and the relations within it”13.

This decision was supported by the vigorous growth in tourism development. It was in 1984 that Croatia forecast revenues of 3 billion dollars from tourism, which was an additional incentive to educate the personnel that was needed to meet these demands. Thirty candidates, mostly graduate economists, enrolled in the renewed postgraduate study in tourism. Not one of the twelve subjects taught in the studies was part of the teaching curriculum of the four-year undergraduate study at the Faculty of Economics at that time. This step represented a significant and positive change in the quality of studies in this postgraduate course. In general, the study basically retained the organisational structure of the former postgraduate studies. The lecturers came from the ranks of renowned tourism experts and pedagogues, such as Dr Dragutin Alfier, Dr Srđan Marković, Dr Ivan Antunac, Dr Krešo Car, Dr Boris Vukonić, Dr Boris Pirjavec, Dr Stjepan Češljaš, Dr Vilim Gorenc and others.

Since the Faculty of Economics was an institution where tourism research was being promoted, The World Tourism Organisation decided in 1989 to establish here the International Center for Education and Research in Tourism. In fact, it had all started two years earlier, on the 5th and 6th November 1987, at the impressive international conference under the title “Tourism in International Exchange”, which was held at the Faculty. The opening ceremony of the conference was conducted by the general secretary of the World Tourism Organisation, Dr Willibald Pahr. There were 450 participants from 13 countries present at the conference. Apart from our experts discussing their views on modern tourism, some of the world’s leading tourism experts like Dr Luciano Merlo from Rome, Mr Vincent Planque from Paris, Mr Villa Fradera from Barcelona, Dr Alfred Koch from Munich, Dr Andras Kolacjek from Budapest and Dr Josef Mazanec from Vienna presented their standpoints. This was a true acknowledgement of the importance of the Faculty’s activity in the field of education and research in world. In his introduction, Dr Pahr stressed: “The Faculty in Zagreb was one among the first in the world to take tourism seriously, therefore this institution has done a lot of good work in improving the study of tourism from the economic, social, environmental, cultural and political aspect”14.

14 Translation from phono record of the speech from dr. Pahr at the international conference held at Faculty of Economics in Zagreb on November 5, 1987.
DEVELOPMENT IN THE NEW STATE OF CROATIA

During 1989, in expectation of political, social and economic changes (which took place soon after), the entire existing teaching curriculum at the Faculty was systematically analysed. The reason for this also lay in the changes taking place in higher education for the needs of tourism in many developed tourist countries of the world. These changes were the consequence of the precipitate development of tourism in almost all parts of the world and of the qualitative changes resulting from this development. The proposed changes in the study of tourism related more to the content of the programme than to the organisation of the studies. Tourism was still being studied in accordance with the two-year and the four-year study programme.

The year 1989 was particularly important for the study of tourism at the Faculty of Economics, but also for the study of tourism in Croatia in general. In that year, on the initiative of the professors teaching tourism subjects, a scientific journal "Acta turistica" was started at the Faculty. This was also the Faculty's first scientific journal in its entire history. The editor-in-chief was Professor Dr Boris Vukonić, while Professor Dr Boris Pirjevec was appointed the president of the Editorial Board. The journal came out twice a year and published articles simultaneously in Croatian and English translations. The interest that this move by the Board aroused in the Croatian and foreign specialist public led to the inclusion of foreign tourism experts in the journal's Editorial Board. All those invited by the Board gave a positive answer and since 1991 the Editorial Board of "Acta turistica" has had an international composition.

As far as tourism is concerned, the Faculty of Economics welcomed the foundation of the new Croatian state with a firmly defined and recognised programme of undergraduate studies and a relatively large number of students, but with no postgraduate study. However, the years that followed were not favourable either for the development of tourism or for education and research in tourism. Yet, the Faculty did not falter in its attempts to maintain its tourism-related activities, at least in the domain where this was possible. This referred particularly to the journal "Acta turistica", which continued to come out during the Homeland War. In the period 1989 - 1994, the journal published 71 specialist and scientific articles by Croatian and foreign authors, and since 1992, with minor breaks, it has been publishing a glossary of tourism terms from the pen of Professor Dr Ivan Antunac.

In the process of the improvement of teaching plans, which the Faculty of Economics continued in the new state and completed in 1994, some innovations were introduced in the plans and programmes of tourism study, which were reflected in the change of the names and contents of some disciplines. More attention was paid to management, while ecological aspects were added to the subject of “Tourism Geography” and a completely new subject of “Sociology of Tourism” was introduced. Contacts with economists have shown that these changes were justified, while the continuation of the policy of educating tourism-related economic personnel at a separate department of the Faculty of Economics was especially welcome. These changes have affected the organisational structure of the Faculty as well. Tourism and trade were initially placed in the same department (“Department of Trade and Tourism”) and later, for the first time in the history of the Faculty, in an independent “Department of Tourism”.

Since 1995, the Faculty has been involved in the organisation of specialist biennial events "Agencies …”, which gathers tourism workers and experts predominantly dealing with the activities of tourist agencies and tour operators. Thus, after Catering, this important field in the tourism sector in Croatian tourism has acquired its own permanent specialist
event (gatherings were held in Zagreb in 1995, 1997 and 1999). At the same time, the Faculty has taken a more active part and a greater role not only in the increased education of personnel needed by tourist agencies, but also in expressing its own specialist standpoints, which supports the creation of an overall tourism policy for Croatia.

The improvement of teaching programmes is the permanent task of all institutions of higher education, because life, and particularly economic life, is constantly changing and adapting to enormous technological progress. This progress is setting new and more complex tasks before the educational system. It is not surprising, therefore, that in the last two years the Faculty has undertaken to refresh its general undergraduate teaching plan and programme, which has also given the department of tourism an opportunity to modernise its teaching plan and programme at both undergraduate and postgraduate level. The teaching plan and programme of tourism at the four-year undergraduate study has undergone significant changes and improvements, which, when it is finalised and confirmed by the relevant institutions of the educational system, should show the first results this year and in the coming years.

The postgraduate study, with additional new contents, has been renamed "International Tourism in the National Economy". Along with traditional disciplines, the study has received important novelties: new tourism-related subjects have been introduced, such as "Transport Policy in Tourism", "The Theory and Policy of Tourism Development", "Macro-economic Tourism Analysis", "Multinational Aspects of International Tourism", "Tourism from a Socio-cultural and Anthropological Perspective" and "Informatics in Tourism". Some general economic subjects have also been introduced, for the time being in the form of optional subjects, such as "Human Resource Management" and "The Economics of European Integrations". Currently, the number of students enrolling is not very high, but this enables a more direct relationship between students and professors and ensures various forms of tutorial work. Naturally, this has increased the quality of studying and created conditions in which over 80% of the students have obtained Master's degrees in postgraduate tourism studies since 1997.

Great acknowledgement to the Faculty of Economics and its Department of Tourism was given by the decision of the World Tourism Academy (IAST), the most prestigious international association of tourism experts, to hold their regular congress in Zagreb in 1999. The congress was well attended despite some lingering suspicions by the world about Croatia as a safe destination. The congress was perceived by the Faculty as a token of appreciation to its Department of Tourism and its members.

Publishing activities constitute a special chapter in the work of the teachers at the Department of Tourism who participate in postgraduate studies and in designing various tourism-related projects. It is with pride that we can say that there is no tourism-related subject for which there is not a relevant textbook written by our teachers. In the last two years alone, the members of the Department of Tourism have published about ten books and textbooks dealing with tourism subjects in the Croatian language, and have contributed to the books of foreign authors and publishers with several independent chapters. Professor Vukonić was one of the editors of the largest lexicographical publications in the field of tourism in the world to date "Tourism Encyclopaedia" (published by the American Routledge in 2001). We are particularly proud of the "Rječnik turizma" (Dictionary of Tourism), the first and the only dictionary so far in Croatia, for which to a large measure the teachers of the Faculty of Economics have processed over 2,500 terms directly or indirectly related to tourism matters. The dictionary was published in 2001 in cooperation with the publisher Masmedia from Zagreb. At the moment of this anniversary, it is with pleasure
that we can announce that the first Tourism Encyclopaedia in Croatia will be completed within 2 - 3 years, this time in wider cooperation with other tourism experts in Croatia and with the same publisher. This will be a highly specialist and responsible task, but we firmly believe that we will succeed, just as we have succeeded with other projects run and completed by the Department of Tourism at the Faculty of Economics.

In the year 2001, the Department of Tourism received yet further recognition. The "International Management Development Association" (IMDA) entrusted the Department with the co-organisation of the Association's Annual congress. The congress was held in Zagreb, with the full participation of an impressive number of IMDA members, who arrived from 23 countries in the world! The Faculty, the Department and its members received written acknowledgement and a plaque for the organisation of the congress.

However, the greatest success of the Faculty of Economics is the recognition bestowed on the Faculty and its four-year programme for educating personnel for the needs of tourism by the World Tourism Organisation in 2001.

The dynamic activities in the field of tourism conducted by the Department of Tourism in four different fields - undergraduate and postgraduate education, research, writing textbooks and other specialist literature, and organising specialist seminars and other forms of permanent education for the needs of tourism, are run by the following Faculty staff: full professors Dr Miljenko Bilen, Dr Vilim Gorenc, Dr Boris Pirjavec, Dr Josip Senečić and Dr Boris Vukonić; associate professors Dr Nevenka Čavlek, Dr Darko Prebežac and Dr Šemso Tanković; assistant professor Dr Jadranko Grgona and assistants Ivica Ćačić M.Sc., Ksenija Keča M.Sc., Oliver Keser M.Sc., and Kristina Bučar Perić M.Sc. A larger number of teachers from the Faculty of Economics and other faculties of the University of Zagreb, as well as of other University centres in Croatia and abroad, are also involved in these activities.
Growth and change in tourism education

David Airey, University of Surrey, UK

Abstract

The growth of tourism in higher education has been well documented in the literature and is demonstrated in course enrolments, in numbers of teachers and scholars, in numbers of textbooks and journals and in the volume of research. What has been less well documented is the impact that this growth has had on the nature and type of tourism education. There has been not just a change in scale but a fairly radical shift in the nature of education provision. This paper explains this shift and in doing so considers the challenges and issues that it raises for the future of tourism education.

Using the nature of knowledge as a starting point the paper explores the development of tourism knowledge and the ways in which research has expanded on this knowledge and taken it in new directions. Using Tribe’s notion of curriculum space related to tourism the paper examines the ways in which the curriculum has shifted before going on to consider what this means for the stakeholders in education for tourism.

The paper draws particularly on the experience of the UK but the themes developed also have international applicability.

Keywords: Tourism education, tourism knowledge, curriculum, vocational, multidisciplinary, interdisciplinary
Introduction

Perhaps the most remarkable thing about education for tourism over the past 40 years has been the sheer scale of its growth. This has been well documented in the literature (see for example Airey and Johnson, 1999) and is demonstrated in course enrolments, in numbers of teachers and scholars, in numbers of textbooks and journals and in the volume of research. What has been less well documented is the impact that this growth has had on the nature and type of tourism education. In brief, what we have seen in 40 years is not just a change in scale but a fairly radical shift in the nature of education provision. This paper explains this shift and in doing so considers the challenges and issues that it raises for the future of tourism education specifically at University level.

The first part of the paper provides an outline of the growth of tourism education. This mainly draws on existing sources. Then using the nature of knowledge as a starting point the paper explores the development of tourism knowledge and the ways in which research has expanded this knowledge and taken it in new directions. Next, using Tribe’s (2000) notion of curriculum space related to tourism the paper examines the ways in which the curriculum has shifted and relates this to the changing knowledge base. The paper concludes with a consideration of the implications of the various changes and shifts for the stakeholders in education for tourism.

The paper draws mainly on published sources and these relate mostly to the experience of the UK. However, the themes and issues developed are of international applicability.

Growth of Tourism Education

An outline of the expansion in higher education is presented in Table 1. Although there are some discrepancies in the coverage between the different years the growth is clearly pronounced and appears to be continuing. As Airey (1995) has pointed out, the growth has far outstripped the expansion in higher education itself or in the growth of tourism. He identified four factors lying behind this growth: a long term growing emphasis on vocationalism throughout education; greater attention by students to the employment opportunities provided by their programmes of study; changes in the funding and regulation of higher education whereby institutions have been free to compete with each other for student demand and the associated income that it brings; and a recognition by colleges and universities that tourism is a way of expanding student numbers more reliably and cheaply than many other subject areas. This growth of course is not confined to the UK. Other authors have commented on similar patterns in other countries. In Italy for example all the 14 tourism courses in Universities have been introduced since 1992 (Dipartimento del Turismo, 1996). For accounts from other parts of the world see for example Koshizucha et al (1998) for Japan and Payne (1998) for Australia.

This of course just relates to higher (or University level) education. An even more rapid expansion has taken place in further or technical education and even in schools. Enrolments of many tens of thousands of students are reported (Further Education Funding Council 1998). In summary the UK now has an education provision for tourism at all levels in the UK from School to PhD and across all sectors from accommodation to visitor attractions.

This growth in tourism education has both prompted and been supported by resources and organisations to an extent that the UK now has a fairly comprehensive support structure.
for tourism education. This includes a range of organisations. Notable among these are the Association of Tourism Teachers and Trainers (ATT), the Association for Tourism in Higher Education (ATHE) and the Tourism and Leisure Research Network (TOLERN), all of which work to advance the cause of the serious study of tourism. Outside the UK there is a similar wide range of organisations such as The Travel Research Association (TTRA) based in North America; the Association Internationale d’Experts Scientifiques du Tourisme (AIEST) in Europe and ATLAS with branches throughout the world.

There is also now a contingent of educators specialising in tourism. Airey and Johnson (forthcoming) estimated a total of 430 teachers specifically in tourism in higher education in the UK. These in turn are supported by hundreds of general and specialist textbooks dealing with tourism as well as academic and professional journals, videos and other interactive learning material. A guide to some of the basic learning materials provided for UK tourism teachers is given in the Handbook prepared by the ATTT (Laws, 1997). This listed in 1997 more than 250 textbooks and more than 30 journals.

This sort of development prompted one of the organisations concerned with higher education in the UK to comment as early as 1993 that tourism education had “come of age” (CNAA, 1993). Since then growth and development has continued and tourism has remained an important and popular part of the education repertoire. However, the development of an area of study is much more than simple growth in numbers of courses, students and resources. In some ways, more important than these is the development of the knowledge base about the subject. The important issue in tourism is that the growth in scale has permitted some fairly fundamental changes in the knowledge base. As tourism has grown in scale and courses have expanded, this has brought in more academic specialists who in turn have brought in their own disciplines and approaches to research and this has prompted a whole new development of the knowledge base. The consequence has been both a broadening and deepening of the knowledge.

The Development of Tourism Knowledge

Tribe’s (1997) work provides a framework for considering the development of knowledge in tourism. In this, drawing on the work of Gibbons et al (1994), he identified a number of areas where knowledge about tourism is developed. One of these is the knowledge developed outside the academic community, so called extradisciplinary knowledge from ‘industry, government, think tanks, interest groups, research institutes and consultancies’ (Tribe, 1999 p103). For a new subject area such as tourism, particularly one whose origins were strongly influenced by vocational needs, it is in many ways not surprising that much of the early study and education related to tourism relied heavily on this type of knowledge. An indication of the nature of the type of early knowledge can be seen in the policy of one of the major academic validating bodies in the UK, the Council for National Academic Awards, which interpreted research in this field in a very wide sense to include consultancy and professional practice (Glew, 1991). The sheer importance of this type of knowledge can also be seen in some of the early writings about tourism. For example the very comprehensive reference list for one of the early and influential textbooks (Burkart and Medlik, 1974) is dominated by government and other official reports and studies. This says as much about the state of knowledge at the time as it does about the industry focus of the authors.

The other type of knowledge identified by Tribe is the more traditional academic knowledge mostly developed in academia and for which, according to Tribe (1999 p103), ‘disciplinary-based methodology and peer review are the hallmarks of quality control’. This
type of knowledge is the normal underpinning for higher level study. The subsequent process of development of tourism as a subject as study has in many ways been founded on the development of this type of knowledge. In very simple terms and, unsurprisingly, the growth in the number of scholars has been accompanied by the growth in research and associated academic knowledge. Ample evidence for this is found in the rapid growth in the number of scholarly journals devoted to tourism. One source (Morrison 2001) currently lists 37 tourism journals and nearly as many devoted to the related area of hospitality. Certainly it is now longer necessary to rely solely on Tribe’s extradisciplinary knowledge.

Obviously there has been important growth in the academic underpinning of tourism knowledge. But this is not the complete picture for the development of the subject. Again Tribe’s framework provides a basis for further understanding. Tribe identifies that tourism knowledge comes from a number of different disciplines and in this sense is multidisciplinary. But he also points to the extent to which it is potentially interdisciplinary in that it can serve as a focal point in which disciplines come together to present new insights and new knowledge and perhaps create new theory. Against this background the process of the development of knowledge about tourism can be seen as operating at two levels. First, and most obviously, academics skilled in the contributing disciplines have brought their knowledge and methodologies to an understanding of tourism. There are plenty of examples of sociologists, geographers, economists, for example, exploring the problems and questions posed by tourism. Special issues of academic journals devoted to individual disciplines and their contribution to tourism provide ample examples of this type of knowledge creation and dissemination, as do specialist text books. Secondly, and in many ways more interestingly, has been the development of interdisciplinary knowledge whereby scholars have drawn upon more than one discipline to explain a tourism problem. Butler’s tourism area life cycle (1980) provides an early example of this type of knowledge that in this case springs from geography, biology and marketing but is ultimately located centrally within tourism and addresses a specific tourism issue. It is this type of knowledge that provides the rationale for tourism as a self-standing area of academic endeavour as distinct from a field of enquiry and experimentation by academics from other communities.

Academic research is a slow process and the accumulation and dissemination of knowledge takes place over generations of scholars. With this thought in mind the contribution of the academic community to the study of tourism, as witnessed by the growth of scholarly journals, has happened remarkably quickly, and certainly in less than a generation. This of course has happened because scholars from other disciplines have come into tourism and in many ways is simply a reflection of the fact that this is an expanding field driven more by external forces related to vocationalism and growth in student numbers than by more academic dynamics. In other words academics from other areas have been brought into tourism because it has been an area of growth. One of the questions now is whether the interdisciplinary knowledge will also develop at a fast rate because it is this that lies at the heart of tourism as a discrete area of study and where contributions to tourism theory lie. This may take generations and, of course, will rely upon a robust and large academic community which has some continuity in tourism studies and this in turn will rely on tourism retaining its popularity as an area of study. In this sense tourism faces a dilemma. One the one hand if it is to prosper as an area of academic endeavour it needs to provide a secure base for the development of theory. But it will only be able to do this if it continues to attract and retain an adequate number of scholars and so far it is its vocational credentials that has provided the rationale for recruitment of academic staff.
The Tourism Curriculum

The development of knowledge, of course, has major implications for the tourism curriculum. In its origins the study of tourism was strongly vocational, prompted in part by a desire to meet the needs of a growing tourism industry. Given this, as well as the state of knowledge about tourism, there is little surprise in the fact that the early tourism courses, as implied above, focused on the vocational and drew heavily on what Tribe has referred to as extradisciplinary knowledge. This orientation is strongly reflected in the aims and objectives of courses (Airey and Johnson, 1999) as given in Table 2 and is further demonstrated in the example of a tourism course programme as given in Figure 1. In both there is a strong emphasis on careers, vocationalism, and business.

Tribe again provides a helpful framework in which to view this approach to the curriculum in tourism and to explore how changes in the knowledge base might influence this. Starting from the idea of a curriculum space which he describes as ‘the expanse or area that contains the possible contents of a curriculum’ (Tribe 1999 p111) he goes on to divide the space along two axes: the vocational-liberal axis and the reflection-action axis. The first represents the different ends of the curriculum, essentially the degree of vocational focus, and the second the different stance or mode of study and expression that the curriculum employs to achieve its ends. The vocational-liberal axis runs from curricula that are concerned with the world of work to those that focus on the world of study. The action-reflection axis extends from curricula where students are involved in putting ideas into practice to those where the engagement is with the cognitive processes of the mind. The relationship between these is set out diagrammatically in Figure 2.

From what has been said already it is clear that tourism education had its origins in the vocational/action quadrant. This is most clearly demonstrated by the emphasis in the course provision on professional placements in industry but can also be seen in other aspects of many tourism courses including industry-related projects and case-studies. However, it is certainly not confined to this quadrant and the developments in the knowledge base have provided plenty of opportunities for it to move into other quadrants.

To a certain extent this process of extension into the reflective and liberal areas is shown in a comparison of two views of the curriculum for tourism in the UK taken in 1995 and 2000. Both were based on national consultation exercises involving both academics as well as industry representatives. As shown in Figure 3 the first attempt, by NLG, at setting out a core curriculum for tourism is clearly set in the vocational/action quadrant with an emphasis on the way in which tourism and the tourism industry works in practice. Included under the headings in Figure 3 are, for example, items such as “destination and site planning” “financial implications” “operating characteristics”. By 2000 there is a clear shift in the emphasis toward the more reflective and liberal areas. This is partly revealed in the broad headings provided in the Figure, with only the “products, structure and interactions in the tourism industry” being ostentatiously vocational. It is even clearer in the detailed content with items suggesting, for example, that students should be able to:

• “explain and challenge the theories and concepts which are used to understand tourism”
• “understand the inter-cultural dimensions of tourism”
• “understand the cultural significance of tourism for the tourists and their societies”

In many ways, what has happened is that the developments in the knowledge base have released the curriculum from the vocational/action quadrant.
Challenges and the Way Ahead

What is clear is that education for tourism has undergone a fairly radical change over its relatively short-life. The metrics of students, staff, institutions have increased beyond all expectation and the territory covered by the curriculum has extended way beyond the boundaries associated with a vocational area of study. For the academic community in tourism these changes represent positive progress. However, as already identified in this paper the changes also bring some fairly serious challenges.

The future of tourism education, as with the future of any field of study, lies partly within itself and partly within the external world. Within itself, there are two key challenges. The first is that if it is to maintain its momentum in developing as a serious field of academic study there needs to be continued attention to the development of interdisciplinary knowledge. Only in this way will it develop its own identity as an area of study rather than being simply an application of other disciplines. As already noted, this will only occur if there is a sufficiently large body of scholars pursuing this knowledge through serious research. If tourism can develop this strong interdisciplinary knowledge, it will create a sound rationale for its existence in the academic community and at the same time will provide the basis for the academic community to make unique contributions to the wider world.

The other internal challenge comes from the fact that tourism education is now at a point where it can easily move out of the vocational/action orientation and expose students to liberal thinking and lead them to reflection using tourism knowledge as the basis for achieving this. The challenge here is to balance this against the vocational. Tourism programmes that lose the vocational or extradisciplinary knowledge run the risk of losing their vocational student market. But at the same time, if they do not have a strong academic underpinning they can do little more than provide a reflection of the world as it is rather than provide insights and challenge to the existing world: and it is this that is the unique contribution of the academic.

Turning to the challenge posed by the external world, tourism education has two key stakeholders: the students; the tourism employers and operators. Its popularity, and indeed the rationale for its growth has come about in large measure because it offered primarily vocational education for a growing sector of the world economy hence making it attractive to students and industry. The growth in student numbers in turn brought in the resources, including the scholars and researchers. This has allowed the development of the subject and is now providing the basis for the academy, through its scholarly endeavours, to provide better understanding of the world of tourism, both as an industry and as a social and environmental phenomenon. But this in turn provides the real likelihood of tourism drifting away from the very vocational roots that were the original source of its popularity.

Putting together these three challenges suggests that there are now three imperatives for the development of tourism if it is to strengthen its position as a legitimate member of the academic community. First is needs to continue to develop its interdisciplinary knowledge base. From this it can make a unique contribution. Secondly, it has to extend its course provision outside the vocational/action areas of the curriculum. This provides the academic underpinning for future employees of tourism to understand and develop the world of their work. Thirdly it needs to keep its vocational credentials that to date have provided its external supporters, notably in the form of students. One of the great strengths of tourism is that it is now in a position to offer extradisciplinary, multidisciplinary as well as interdisciplinary knowledge. This makes it an exciting area of study and potentially one in which academia can make a real contribution to the world of the 21st century.
References


**Table 1 Trends in Higher Education - Course Provision**

<table>
<thead>
<tr>
<th></th>
<th>1972</th>
<th>1991</th>
<th>1993</th>
<th>1995</th>
<th>1997</th>
<th>1999</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institutions</td>
<td>2</td>
<td>15</td>
<td>36</td>
<td>43</td>
<td>50</td>
<td>73</td>
</tr>
<tr>
<td>Courses</td>
<td>2</td>
<td>22</td>
<td>53</td>
<td>75</td>
<td>99</td>
<td>145</td>
</tr>
<tr>
<td>New student enrolments</td>
<td>20</td>
<td>1000</td>
<td>2500</td>
<td>4415</td>
<td>N/a</td>
<td>4025</td>
</tr>
</tbody>
</table>


**Table 2 Top Five ‘aims and objectives’ of Tourism Degree Courses**

<table>
<thead>
<tr>
<th>Aims and Objectives</th>
<th>Mentions n=99</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career opportunities</td>
<td>76</td>
</tr>
<tr>
<td>Employment/employer links/work</td>
<td>53</td>
</tr>
<tr>
<td>Tourism industry: large/important/global/growth</td>
<td>50</td>
</tr>
<tr>
<td>Vocational/‘reality’ skills/theory into practice</td>
<td>48</td>
</tr>
<tr>
<td>Tourism industry: international opportunities</td>
<td>45</td>
</tr>
</tbody>
</table>

Source: Airey and Johnson (1999)
Figure 1 Tourism Course
BA (Hons) Tourism

Year 1
Introduction to Tourism; Tourism Environments; Tourism Economics; People, Work and Tourism; Law; Accounting and Finance; Information; Residential Field Trip.

Year 2
Economics and Finance of Tourism Ops; Human Resource Mngt; Tourism Marketing; Law related to Tourism; Administration of Tourism; Assessment of Tourism Resources; Research Methods; Residential Field Trip.

Year 3
Industrial placement.

Year 4
Tourists and destinations; Business and Tourism; Options; Dissertation.

Her Majesty’s Inspectorate (1992)

Figure 2 The Use of Curriculum Space

<table>
<thead>
<tr>
<th>Stance</th>
<th>Reflection</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ends</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Liberal</td>
<td>Reflective Liberal</td>
<td>Liberal Action</td>
</tr>
<tr>
<td>Vocational</td>
<td>Reflective Vocational</td>
<td>Vocational Action</td>
</tr>
</tbody>
</table>

Source: Tribe (1999)
### Figure 3 Curriculum for Tourism

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• The meaning and nature of tourism</td>
<td>• Concepts and characteristics of tourism as an area of study</td>
</tr>
<tr>
<td>• The structure of the industry</td>
<td>• Products, structure and interactions in the tourism industry</td>
</tr>
<tr>
<td>• The dimensions of tourism and issues of measurement</td>
<td>• Role of tourism in communities and environments</td>
</tr>
<tr>
<td>• The significance and impact of tourism</td>
<td>• Nature and characteristics of tourists</td>
</tr>
<tr>
<td>• The marketing of tourism</td>
<td></td>
</tr>
<tr>
<td>• Tourism planning and management</td>
<td></td>
</tr>
<tr>
<td>• Policy and management of tourism</td>
<td></td>
</tr>
</tbody>
</table>

Leading University Academics in Hospitality Management Research

Stephen Ball, Sheffield Hallam University, UK

Abstract

The interest in, and pursuit of, hospitality management research in universities is gathering momentum and as a consequence its leadership has become an important issue. This conceptual and applied paper is an exploration of the role and practice of hospitality management research leadership at subject group level within the university context. It focuses upon the research activities of hospitality management academic staff.

The paper has been developed because our understanding of university research leadership, generally, is almost entirely limited to the knowledge and experiences of those who hold research leadership positions and yet leadership of research would seem vital to its development. This paper has also been developed as a basis for empirical work by the author who is a research leader.

The aim of this paper, then, is to develop a deeper understanding of the role of leadership of hospitality management research undertaken by academics in Universities. More specifically the objectives are:

- To chart the development of university hospitality management research in the UK and to explain the nature of research activities in the hospitality management discipline in universities.
- To analyse leadership for research.
- To examine the role of leadership in university hospitality management research at the subject group level and to explore the activities of research leaders.
- To identify facilitators and constraints to leading research and to propose the ways in which a leader can enable hospitality management research work.
- To outline a methodology for empirical research into hospitality management research leadership.

Keywords: Universities, Research, Academics, Leadership, Hospitality management

1 Stephen Ball MPhil BSc MHCIMA MILT, Reader in Hospitality Management
Centre for International Hospitality Management, School of Sport and Leisure Management
Sheffield Hallam University, City Campus, Howard Street
Sheffield S1 1WB, Tel: +44 (0)114 225 2948 Fax: +44 (0)114 225 3343 E-mail: s.ball@shu.ac.uk
INTRODUCTION

Focus and Rationale

This conceptual and applied paper is an exploration of the role and practice of hospitality management research leadership within the university context. It focuses upon the research activities of hospitality management academic staff who are central to the development of new hospitality management knowledge and to the development of students as researchers. Furthermore, academic staff are increasingly being encouraged, or asked, to engage in research themselves. It could be argued that the future status, direction and amount of hospitality management research lies especially with these people.

The paper has been developed for a number of reasons. Firstly, our understanding of university research leadership, generally, is almost entirely limited to the knowledge and experiences of those who hold research leadership positions. Despite its importance very little has been written on leadership in university research. In contrast to the increasing amount of literature upon hospitality management research methods and applications that devoted to the management and leadership of research in the field is seriously lacking.

A second reason for writing this paper is to bring to the fore what the author believes is an important topic around which there are an array of issues. These can be articulated through a range of questions. Can and should academic staff be led in research? If so, what is the nature of this leadership and what do leaders do? To what extent are the existing concepts of leadership appropriate for the research activities of academic staff in the hospitality management field in universities? Are the traditions of academic freedom, individual autonomy and decision-making by consensus barriers to leadership? What other barriers are there to the leadership of hospitality management research? Where in the hospitality management research field might leadership be identified? This paper seeks to begin to answer these questions.

A third reason for this paper is to provide a basis for empirical work by the author and others. By bringing this topic to the attention of other researchers it is hoped that research leadership, and hospitality management research leadership specifically, will be similarly recognised as worthy topics for investigation; especially for research in the ‘real world’.

Purpose, Approach and Justification of the Approach

The aim of this paper is to develop a deeper understanding of the role of leadership as it relates to university academics in hospitality management research. More specifically the objectives are:

- To chart the development of university hospitality management research in the UK and to explain the nature of research activities in the hospitality management discipline in universities.
- To analyse leadership for research.
- To examine the role of leadership in hospitality management research at the subject group level and to explore the activities of research leaders.
- To identify facilitators and constraints to leading research and to propose the ways in which a leader can enable hospitality management research work.
To set out a methodology for empirical research into hospitality management research leadership.

To achieve these objectives the approach taken will consist of reviewing the literature on leadership, especially related to the transformational and transactional leadership processes, and upon the university and hospitality management research contexts.

Taking an approach which particularly focuses on transformational and transactional leadership can be justified as it is an approach which has stimulated a large number of other studies (Shackleton, 1995 p.122) which Bryman (1992 p.128) concludes have 'produced an impressive array of findings which possess a good deal in common' It is also an approach that has been used elsewhere as a framework to examine what the leadership process is about and what leaders do (for example, Kakabadse and Kakabadse, 1999). The approach adopted herein includes consideration of context as it is likely to have an influence on the interactions between academics in the performance of their job and upon the process of research leadership. According to Kakabadse and Kakabadse (1999 p.7) context is the intervening variable between transformational and transactional leadership and ‘the power of context is substantial’.

Given that hospitality management is normally taught and researched at a subject group or department level the research leadership pitch of this paper will be towards ‘middle management’ level rather than ‘senior/top management’ level. Typically hospitality management research is ‘strategically’ lead by people called head of department, research professor, reader or simply hospitality management research leader. The specific responsibilities, key tasks and objectives of such people tend be generally vague or where they are better defined idiosyncratic to particular institutions. Analysis of position/job advertisements and descriptions supports this view as does anecdotal and experiential evidence. However, this is not necessarily a weakness as it enables those who lead research to determine their own direction and modus operandii, to innovate and specialise and to be entrepreneurial in the roles they hold.

The paper is also concerned with the activities of research leaders rather than their characteristics i.e. what they do rather than what they are. In the final analysis it is expected that a better understanding of leadership and leadership associated issues in hospitality management research will materialise and that practical ways will be identified for the development of research and scholarship by research leaders in hospitality management.

Background

Research in most UK universities is a key and well established activity. Indeed it is probable that some kind of research is in progress in every university in the UK. Research and universities appear so inseparable that they have become almost synonymous. Whether all universities, or even any, should engage in research has and remains an issue with, as Barnett (1990 p.122) details, proponents on either side of the debate. Nevertheless university research is ubiquitous with the reasons for its presence and significance being many fold. These include to raise funds, to enhance the image, reputation and development of institutions and their staff, to generate and enhance knowledge, to solve practical problems in industry and society at large and to further economic, technological, scientific and social development. University research is also argued to be important for the improvement of the quality of teaching - the academic who is at the cutting edge of his/her subject is claimed to be the one best qualified to teach. Significant resources, and many people, tend to be in-
involved in university research with some institutions/departments being more research oriented than others. Furthermore academics are defined as research active or non-active for the purposes of the UK Research Assessment Exercise (RAE). Those that are non-active are frequently encouraged to become more research active.

The importance of research to universities means that it normally forms part of their objectives. Their achievement, as with any other business or work objectives, will be facilitated by having a vision which involves having a strategy. This suggests that leadership is needed.

Events, changes and pressures occurring in Higher Education (H.E.) have increasingly focussed attention upon the importance of leadership, in universities. Leadership in university research is no exception. Amongst those emphasising issues related to research leadership are Bell and Harrison (1998), Middlehurst (1993) and Ramsden (1998). Middlehurst (1993), for example argues for effective leadership and says that,

'At a time of change in higher education, the quality of university leadership is an issue of key importance. Whether heading a research team, planning curriculum innovations, managing a department or running an institution, effective leadership is required'.

Leadership is closely associated with change and leaders are often viewed as being necessary for responses to change in the environment and agents of change amongst colleagues or subordinates. Kotter (1990), for example, argues that leadership is concerned with 'constructive or adaptive change'. In terms of academic research this might involve giving a group of people a clear vision and a clear sense of direction, trying to take them forward, as a collective and as individuals, in that direction and by initiating appropriate actions. In other words engaging people in the research agenda and stimulating or enthusing them are key components. In Bass's (1985) terms this is called transformational leadership and can be associated with inspirational leadership.

Bell and Harrison (1998, p.131) elude to the regular RAE’s as a key pressure for leadership in research in H.E. and state that:

'Research Assessment Exercises forced universities to formalise their research structures, to define more precisely what their research targets were, to identify who was research active, who was not.... It made it necessary for research to be managed'.

The initiation of structures and clarification of roles are features of what Burns (1978) called 'transactional leadership'. Other components include: the achievement of actual or promised rewards dependent on reaching certain performance levels; and management by exception where action is taken by the leader when progress or action is not as planned. Arguably these components would seem to have less relevance to academic research than to activities in commercial organisations.

Leading academic research is challenging given that the researchers are also usually teachers. Research and teaching are usually considered complementary in a University's raison d'être but they may be in conflict as time spent on one may be at the expense of the other. Furthermore it is often the case that those who do more teaching may be jealous of those who are more involved in research. This could be because the 'teacher' perceives the 'researcher' as having higher status, better conditions of employment or improved promotion prospects. Role related factors causing tension in research have been identified by Bell (1977) and Punch (1998).
A leadership framework for application to university research

Studies of academic leadership in higher education have been few. Green (1988), with particular reference to the US scene, Middlehurst (1993), Ramsden (1998) and Bareham (2001) are examples. Ribbins (1997) purports to examine leadership in universities but closer inspection shows this not to be the case. More generally ‘leadership has been and continues to be a source of endless curiosity… (and the).. leadership literature increases at a truly staggering rate’ (Gronn, 1999 p.vii). Analysis of Bass’s work demonstrates this. In 1990 Bass (p.xv) recorded 7500 leadership references which contrasted with 3000 in an earlier 1974 edition. One of the reasons for this large and growing interest in leadership is that it is commonly accepted as important and something that matters; it affects how organisations perform (Ogawa and Bossert, 1997). The importance of leadership has been recognised with regard to organisations in general by Fiedler and Garcia (1987 p. 1). They claimed that ‘the quality of leadership is one of the most important factors in determining the success and survival of groups and organizations’.

The underlying stance adopted in this paper is that research leadership in universities can improve research outcomes and staff enthusiasm and commitment to research. Such a view of the importance of leadership to university research is supported elsewhere. In a study conducted in Australia Moses (1985) reported how leadership can be exercised to encourage and stimulate high quality research. This argument that leadership contributes to research performance is even stronger in universities today given the climate of output driven systems, of precious financial resources and of heightened competition and where the raison d’être of universities is a topical contemporary philosophical and political issue (Barnett, 1990 p.122). While it could be said that researchers can exist without leadership and that research could be undertaken without leadership quality leadership is considered important to both university researchers and research.

What is leadership?

Despite the considerable amount of research and literature upon leadership getting a grasp of it is complicated and definitions and explanations abound. McCall (1977 p.1) supported this when he said that: ‘After over forty years of empirical investigation, leadership remains an enigma’. While Bennis and Nanus (1985) state that no agreement exists about the essence of leadership, or the means by which it can be identified, achieved or measured whether reference is made to everyday speech or to the literature. Distinguishing leadership from other social influence processes, such as authority and power, has complicated efforts to research leadership. While differences in definition have been put down to different disciplinary perspectives of the definer (Middlehurst, 1993 p.7 and Beare, Caldwell and Millikan, 1997 p.24) and to be a reflection of different contexts (Beare, Caldwell and Millikan, 1997 p.24). If the influence of different perspectives and contexts upon leadership is accepted then the argument that there is more than one ‘correct’ meaning becomes more compelling.

Accepting the many different meanings attached to leadership analysis of leadership definitions does show that three particular elements commonly stand out. These are goal setting and achievement, group activities and influence upon behaviour of others. Three examples of definitions illustrate the centrality of these components. Stodgill (1950 p.4) defined leadership as ‘the process of influencing the activities of an organised group toward goal setting and goal accomplishment’ whereas Fiedler (1967 p.8) considered the leader to be ‘the individual in the group given the task of directing and co-ordinating task-relevant
group activities’. More recently Shackleton (1995 p.2) in acknowledging the involvement of group, influence and goal in leadership proposes that leadership is:

‘the process in which an individual influences other group members (usually called sub-ordinates or followers) towards the attainment of group or organizational goals’.

Influence is often associated with formal authority and decision making. Fiedler implies that those, such as Vice Chancellors, School Directors/Faculty Deans and other senior academics and University staff, who have formal authority are leaders and may exercise leadership in Universities. This authority and right to lead usually materialises from appointment but it may be voluntarily conferred. For example, a Dean is sometimes elected by academic members of staff in older universities. Other writers claim leadership extends beyond senior staff. Stodgill (1950), for instance, acknowledges that leadership exists in other contexts in and involves those other than senior staff. The existence of people in Universities with job titles such as subject group leader, course leader and research group leader supports this. They probably have no or very little formal authority. There are others at low levels in the hierarchy who do not have ‘leader’ within their job title, who may exercise leadership. These may be the real leaders and who informally influence groups towards goals that those hold formal leadership positions do not wish to pursue (Shackleton, 1995 p.3).

Another important aspect of leadership which has been raised in the literature is that leadership implies that a leader motivates the group and influences activities to attain group goals (Lipham, 1968 p.122, Shackleton, 1995 p.3). This is important in effecting change. If no change occurs and activity is restricted to existing means and ends then leadership has not occurred. Beare, Caldwell and Millikan (1997 p.25.) state that ‘management rather than leadership may be a more appropriate description of such activity’.

Is leadership synonymous with management?

The debate over whether leadership is, or is not, synonymous with management and whether both are needed within organizations has been discussed considerably in the literature. Some earlier writers (e.g. Green, 1988 pp.16-18 and Mayhew, 1979 pp.74-75, Schon, 1984 p.36) emphasise the differences while others, particularly more recently, (e.g. Bush and Coleman, 2000 p.1 and Glatter, 1997 p.189) believe such distinctions are overdrawn. Nevertheless an uneasy fit between the two terms does appear to exist as we generally expect managers on occasions to lead and, conversely, leaders at times to manage. The uneasy fit between leadership and management is recognised by Kakabadse and Kakabadse (1999 p.5). They extend the unease to transformational and transactional leadership and state that leaders who transform the status quo create a vision of the future whereas another fundamental aspect of leadership is the concern with the management of daily affairs i.e. transactional leadership. Transactional leadership has been regarded as closely resembling traditional definitions of management (Middlehurst, 1993 p.33). Therefore some degree of overlap is apparent between leadership and management with the essence of transactional leadership being management. Burns (1978) coined the term ‘transactional leadership’ to contrast with transformational leadership. Further attempts to delineate the elements of transactional and transformational leadership have been undertaken by others including Bass (1985) and Kakabadse and Kakabadse (1999). Some of the more obvious distinctions between these leadership approaches are shown in Figure 1.
Figure 1 Distinguishing transformational and transactional leadership

<table>
<thead>
<tr>
<th>Attributes</th>
<th>Transformational</th>
<th>Transactional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approach</td>
<td>Innovative (creates opportunity, imagines new aspects to explore)</td>
<td>Balance of operations</td>
</tr>
<tr>
<td>Focus</td>
<td>Concentrates on vision, culture, and goals</td>
<td>Concentrates on control, production and results</td>
</tr>
<tr>
<td>Motivation</td>
<td>Through emotion, offering suggestions</td>
<td>Formal authority mechanisms</td>
</tr>
<tr>
<td>Use</td>
<td>Influence</td>
<td>Control</td>
</tr>
<tr>
<td>Oriented towards</td>
<td>Ends</td>
<td>Means</td>
</tr>
<tr>
<td>Role</td>
<td>Discretionary</td>
<td>Prescribed</td>
</tr>
</tbody>
</table>


Finally, on the point of leadership and management, many of the aforementioned writers stress the importance of leadership and management and in the words of Bush and Coleman (2000 p.4): ‘both are equally important for educational effectiveness’.

Theories of leadership

Leadership has been analysed in various ways due its complexity and variability and many theories have been proposed. These include ‘trait theory’, ‘the great person theory’, behavioural approaches, situationist and contingency approaches, power and influence theories, cultural and symbolic theories, cognitive theories and transformational and transactional approaches. These are explained and evaluated in many texts, including in Middlehurst (1993), Mullins (1998) and Shackleton (1995). One of the criticisms of these theories has been that they are often converted from description to prescription without much justification (Bush and Middlewood, 1997 p.23). The purpose here is not to examine each of these theories but to adopt a particular frame and apply it to hospitality management research to gain an appreciation of the actual and potential activities of research leaders. While leadership is about possessing certain attributes or traits more fundamentally it is about what leaders do in a particular context, which in this case is the context of research in universities. With regard to academic leadership this is a view shared by Ramsden (1998). Academic leadership, in general, and research leadership, more specifically, are concerned with getting the best from a mix of physical, financial resources and human resources. What the leader does with these resources particularly other academics, which are the principal resources within a University, is key to success.
The university context for research

Any examination of leadership requires a discussion of the context in which it takes place as leadership is contextual (Green, 1988 p.9). However context has not always previously been considered. Argyris (1979 p.61), for example, suggests that past leadership studies have been general and that ‘leadership research lacked utility and application in specific action contexts’. The need to consider context is a view shared by others. Kakabadse and Kakabadse (1999 p.2) state that leadership today is influenced by the impact of the prevailing circumstances both within the organisation and within other organisations. Leadership then requires followers, constituents or elements connected to an organisation or group operating in a particular environment at a particular point in time. Context here therefore refers to organisation or work group. In this study of leadership and hospitality management research in universities a consideration of both the university context and the hospitality management research context is then required. To begin with the university context will be discussed and a number of pertinent questions addressed. These include: Is it correct to talk about universities as if they are all the same or are there different types of university? If there are different types how can they be categorised? What are the academic values and culture/s within universities as these may act upon leadership? And given, as previously mentioned, that leadership is often associated with change (Kotter, 1990 and Middlehurst, 1993), what changes have occurred in universities? In attempting to answer these questions an understanding of the nature of the organisations in which hospitality management research leaders work will be gained and some of the factors impinging upon their leadership activities will be identified.

Each British university is different. Differences in their missions, goals, strategies, scope, target markets, operating structures etc. make them so. Clearly, due to this complexity, it would be impossible to consider the actual circumstances within every university. However an alternative approach is to conceptualise types of universities and to then consider their implications upon research leadership. Various typologies exist with reference to the UK scene such as those which distinguish between ‘old’ and ‘new’ universities and between ‘research’ and ‘teaching’ universities. However one which is particularly useful here is that of Ramsden (1998) who, drawing on McNay’s work (1995), identifies models of university cultures to examine change in universities. From this work four ‘pure’ University types can be identified (see Figure 2). However in reality, as McNay (1995) records, all the universities he studied possessed elements of each model. In general though changes appeared to be occurring with movement in Universities between the models. Similar changes were noted by Ramsden (1998). To summarise both McNay and Ramsden the general patterns of change consist of a movement from the collegium and bureaucratic cultures towards the enterprise and corporate cultures. The influences of these cultures upon research leadership will be examined later in this paper.

Finally, something needs to be said about the characteristics of academics and academic groups as they are a fundamental part of the academic leadership process. This view is consistent with the general definition of leadership provided earlier. The values, attitudes, responsibilities and behaviour of academics will influence the nature of research leadership and impact upon the actions and effectiveness of research leaders.
Collegium – focus on freedom to pursue University and personal goals. Standards internally set. Evaluation by peer review. Decision making is consensual. Dominant unit is discipline based.

Bureaucracy – focus on regulation, consistency and rules. Standards are externally related. Evaluation based on procedures audits. Decision making is rule based.

Enterprise – focus on competence. Orientated to outside world. Decision making is flexible. Leadership is devolved. Dominant unit is small project team.

Corporate – focus is on loyalty the organisation. Commanding and charismatic management style. Competitive ethos. Decision making is political and tactical. Standards relate to plans and goals. Evaluation is based on performance indicators and benchmarking.

The traditional collegial model has been adopted by most universities and despite criticisms (Bush, 1997 pp.75-76) and the threat from the increased emphasis on competition (Middlehurst and Elton, 1992 p. 261) it still remains albeit in varying degrees between universities and perhaps, as Middlehurst (1993 p.49) argues, is more symbolic than real. The influence of this model upon academics is profound. It underpins the work, i.e. teaching, research and administration (Johnston, 1996) of academics and characterises their behaviour. The model is associated with shared ideals, democracy, consensus decision-making, academic freedom and autonomy. This freedom and autonomy is associated with individual achievement. Academic staff strive for such achievement and honour and admire it (Ramsden, 1998) whether it be related to teaching, research or publication. Individualism and independence characterises much of an academics work and can pose a challenge to leaders who wish to set their own direction to reach particular ends. On the other hand democracy and consensus decision-making can also often frustrate leaders and slow down progress. Ramsden (1998) provides evidence to indicate that co operation and teamwork, involving a high degree of communication and support, appear to facilitate better teaching and research. Again Middlehurst (1993 p.49) suggests that such academic group activity, or ‘collegial behaviour between academics’ as she calls it, has been weakened by the pressures of competition during the 1980’s and 1990’s.

**Defining academic research**

No consensus exists on how research should be defined. In Universities different definitions and interpretations of research exist. This is supported by Verma and Mallick (1999 p.2 ) who say that: ‘The concept of research does not have the same meaning in all academic disciplines because of the diverse nature of activity’.

Allen (1988 p. 108) says ‘research is any form of investigation which leads to new knowledge’. He contrasts this with scholarship which he claims is concerned with ‘the pursuit and mastery of existing knowledge, however obscure’. However in practice these activities do overlap. The National Committee of Inquiry into Higher Education (1997 p.177) offers a distinction between what it terms ‘corporate’ research, and ‘private’ research which includes scholarship. The Committee associates the former type with ‘re-
search’ universities and with the obtaining of major grants and contracts to support research while the latter is primarily concerned with staff undertaking research to support teaching and is a function of ‘teaching’ universities. The Committee goes on to say that:

‘.. ‘teaching’ institutions believe that it is important for their academic staff to be close to the frontier of their subjects, since this adds to the authority and vitality of their teaching. Staff are expected to spend less of their time doing research than in ‘research’ universities. Yet, the recognition of research enables the institutions to attract high quality teaching staff who also produce good publications, which add to the reputation of the institution’. (The National Committee of Inquiry into Higher Education, 1997 p.177)

Corporate research is not especially significant in hospitality management. Those universities which do obtain grants and contracts for hospitality management research are few and do have aspirations to be, or style themselves as, hospitality management ‘research’ universities. They have features of autonomous research units (see Figure 3) with research being a key basic task, the RAE being very important to them and with income generation being an objective.

Academic research in hospitality management matters, whether it be for corporate or private reasons, and is an organized and deliberate activity involving the collection of new information or the use of existing knowledge for a new purpose and hence it may embrace conceptions of scholarship. However while some hospitality management research exhibits features of autonomous units most is dependent research and thus academic research leadership within the university should be considered in this context.

Figure 3 Distinguishing features of autonomous research units and dependent (non-autonomous) research units

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Autonomous research units</th>
<th>Dependent research units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approach</td>
<td>Production/results emphasis</td>
<td>Researcher development, Qualifications</td>
</tr>
<tr>
<td>Orientation</td>
<td>Commercial/academic</td>
<td>Academic</td>
</tr>
<tr>
<td>Core activity</td>
<td>Research/consultancy</td>
<td>Teaching</td>
</tr>
<tr>
<td>Basic tasks</td>
<td>Research</td>
<td>Teaching, research, administration</td>
</tr>
<tr>
<td>Funding</td>
<td>Research grants, corporate funds</td>
<td>University or personal funding</td>
</tr>
<tr>
<td>Work</td>
<td>Determined by client, sponsor</td>
<td>Determined by University, researcher timeframe</td>
</tr>
<tr>
<td>Budget holder</td>
<td>Head of unit</td>
<td>School, Division or Department Head</td>
</tr>
<tr>
<td>Financial priority</td>
<td>Income generation</td>
<td>Cost coverage</td>
</tr>
<tr>
<td>Facilities</td>
<td>Dedicated</td>
<td>Shared with teaching and administration task needs</td>
</tr>
</tbody>
</table>
The development of university hospitality management research in the UK

Hospitality management is a relatively new subject in UK higher education. The first two degree courses were introduced at the Universities of Surrey in 1964 and Strathclyde in 1965 while six others were started in Polytechnics by 1977. By 1995/96 there were approximately 79 degree and diploma courses available in 27 higher and further education institutions (Litteljohn and Morrison, 1997).

Research and scholarly activity have tended to run in parallel with the provision of hospitality management degree courses especially given the contribution of this activity to the validation, operation and development courses. The interest in, and pursuit of, hospitality management research in Higher Education has gathered momentum in recent years (Brotherton, 1999) and has been stated to be in a mature position (Lockwood, 1999). This is a result of a number of factors. The need for the discipline to make itself more credible in academia is one reason. RAE’s have also forced hospitality management academics in Universities to consider and further their research and scholarly activities Another reason for the encouragement of hospitality research in Universities has been to enable the curriculum and teaching to be up-to-date and vibrant. However the development of co-ordinated research activity has been slow, patchy and marked by individualism.

In the beginning hospitality management research in Higher Education institutions generally started life in the hands of individual academic researchers pursuing research qualifications. From this learned scholarly outputs slowly came. However the focus upon preparing students for the industry and upon enabling students to ‘do’ in the industry through the development of industry specific skills and experience, i.e. vocationalism, meant that entry into the research arena was slow and resulted in what is still a paucity of ‘high quality’ research into hospitality management practice, problems and issues. In the 1970’s and 1980’s there is evidence of a movement from individualism in research to group research projects, collective research activity and the development of co-ordinated research units in research groups, research centres and so on. A number of Universities now have their own research units. So hospitality management is a relatively new ‘discipline’ in research terms with a significant mark on the research landscape only really having been made in the last ten to fifteen years (Brotherton, 1999).

The rise of hospitality research resulted in its recognition at a national level and the Council for Hospitality Management Education (CHME) mounted its first annual national research conference in 1991. A CHME hospitality research sub committee also developed at this time.

The nature of hospitality management research leadership at subject group level within universities.

A number of approaches could be taken to analyse what a university research leader does. The approach taken here applies draws upon Bass’s model (1985) of transactional and transformational leadership and in particular the transformational dimensions of his Multi-factor Leadership Questionnaire. These are used as a framework for analysing the research and research leadership literature. Reference is also made to the author’s own experience as a ‘research leader’. The dimensions are, individualized consideration, intellectual stimulation, inspirational motivation and idealized influence which are transformational leadership components. Brief reference will also be made to the transactional leadership component of contingent reward.
The main purpose of this paper is to investigate the role of leadership for research in hospitality. Ball (2001) identifies and discusses four different hospitality research leadership contexts: research leadership for the field of study generally, research leadership for a subject group/department, leadership of group research projects and leadership of individual research. Similarities and differences exist in the leadership role and activities between these contexts. It is also the view that these contexts are common to all academic disciplines and that therefore the points made are transferable. The focus in this paper is on hospitality management research leadership at subject group level within universities.

Earlier ‘situation’ was argued as being key to leadership. Leaders exhibit different aspects of leadership and different styles depending upon the context in which they are working. This view is shared by Bush and Coleman (2000 p.23). University subject research groups are confronted by contextual factors within the university and also outside. External factors include, for example, the RAE and the activities of competitors. Middlehurst (1993 pp.78-81 and pp.160-161) discusses the context of the external environment and its effects upon universities and individual staff in some detail. Universities have always been competitive to a certain extent for good quality students, high class academics and funding and this trend is expected to continue. Subject-based research by academics is a key area where an institution can gain a competitive edge. Effective leadership at this level then can be important. Internally the culture of the organisation and the nature of academics are important factors. It is to these to which attention will now turn.

As previously mentioned, Ramsden (1998) identifies collegial, bureaucratic, enterprise and corporate models of university cultures. He uses these models to provide a way forward for the development of university leadership, which he claims is appropriate for academic values and universities in the future (see Figure 4). Each of these cultures, it is argued here, has different influences upon subject-based research and, depending upon their presence within a particular university, will impinge upon the leadership of research in subject groups. Criticisms could be levelled with Ramsden’s approach. It could be said that universities do not display features of one particular culture but rather contain elements of each. Also pigeon-holing specific aspects of research leadership against specific university cultures is too precise and polarised and in practice is far more difficult than Ramsden implies. While these criticisms might be justified the approach does facilitate our thinking about research leadership according to differing dimensions of University systems and cultures. It also provides some pointers to the role and practices associated with research leadership in different circumstances.
### Figure 4 University cultures and leadership for academic research at subject group level

<table>
<thead>
<tr>
<th>Collegial</th>
<th>Bureaucratic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Servant leadership. Leadership is a background activity.</td>
<td>Managerial leadership. Transactional elements present. Leadership is formal and rule-governed.</td>
</tr>
<tr>
<td>Control through consultation, persuasion, consent, permission.</td>
<td>Control through systems, administration and rationality.</td>
</tr>
<tr>
<td>Authority derives from professional status. Leaders represent the subject group.</td>
<td>Authority derives from position. Leaders represent senior managers.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enterprise</th>
<th>Corporate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership is entrepreneurial and adaptive. Leadership is guidance, enabling articulation of vision, support for task achievement. Authority and control come from successful performance. Leaders represent colleagues, clients, students.</td>
<td>Planning and crisis-handling leadership Leadership is command based, charismatic, transformational and strategic positioning. Authority and control derive from mission congruence and connections Leaders represent top University leaders</td>
</tr>
</tbody>
</table>

Based on: Ramsden (1998) and McNay (1995)

One of the generalised findings from a review of the literature on leadership in education is that emphasis should be given to transformational rather than transactional leadership (Beare, Caldwell and Millikan, 1997 p.29). Studies have generally shown that transformational leaders are considered more effective than transactional leaders (Shackleton, 1995 p.123) although it should be recognised that leaders may use both types of leadership at different times and in different circumstances. In the terms of Bass and Aviola (1994) transformational leadership is seen when leaders:

- stimulate interest among colleagues and followers to view their work from new perspectives
- generate awareness of the mission or vision of the team and organisation
- develop colleagues and followers to higher levels of ability and potential and motivate colleagues
- motivate colleagues and followers to look beyond their own interests towards those that will benefit the group

These dimensions can be applied to subject (e.g. hospitality management) group research leaders and have alternatively been referred to by Bass (1985) as: individualized consideration, intellectual stimulation, inspirational motivation, idealized influence.
1. Individualized consideration

This could alternatively be called developing people. According to Conrad (1998) ‘research has been an increasingly important focus of academic staff development’ and academic staff are increasingly engaging in research for their personal development. Traditionally a rather ad hoc approach to the development of academic staff researchers has occurred. However, with increasing professionalism and the increasing trend towards corporate management within Universities staff development activities have been brought much more into the centre of the institution and as Brew (1995 p.5) claims are increasingly ‘leading to more systematic and often targeted development’. Subject group research leaders have a particular role here in determining individual research needs and providing for those needs. Relatively little literature exists on research based academic development. Damordarana and Wilson (1995) have produced a handbook to aid the production of a training and development strategy for research centres while Smith (1980) has produced a prescriptive guide for the development and management of small research groups. Neither of these is particularly orientated upon academic staff researchers nor takes into account their particular circumstances. In contrast, Harris (1995) and Conrad (1998) are two authors who describe research development programmes for academics. Harris (1995) sets out the aims of a staff development initiative in the Faculty of Management and Business at the Manchester Metropolitan University. These were to stimulate debate, dispel some ‘myths’, involving staff in identifying their own development needs, encouraging staff to ‘share’ skills and knowledge and provide a supportive environment for staff new to research. Methods of achieving such aims are listed. Ramsden (1998) similarly identifies a number of ways in which academics leaders can enable good research and scholarship through academic staff development. Similar initiatives could easily be devised and run by hospitality management research leaders either for their own subject group or in association with other subject groups.

2. Intellectual stimulation

Many opportunities exist for subject group research leaders to challenge the old ways of staff, to encourage new ideas and to stimulate staff to think about research problems, issues and questions and how to address them. Leithwood (1992 pp.69-70) having studied educational institutions states that transformational leaders appear to be in continual pursuit of helping staff solve problems more effectively. Many of the ways for individual development can also facilitate intellectual stimulation amongst academic staff researchers. These include; supporting staff to deliver papers at conferences, encouraging staff to research and publish on topics related to teaching and learning in their subjects, holding research seminars, organising research skills courses etc.

3. Inspirational motivation

This is leadership through inspiration. By setting out a clear vision of the future and stating what is attainable encouragement can be given to others to raise their expectations. Subject group research leaders might develop a research plan based on an awareness of the interests and abilities of people within the group to move research activity forward. An exemplar general research plan is shown in Figure 5.

Professors are often regarded as inspirational to academic research and a potential for leadership exists with them as they are invariably ‘expected to be capable of bearing the responsibility placed upon them for guiding and developing research and teaching within their subject’ (Middlehurst, 1993 p.70).
RESEARCH PLAN

HOSPITALITY MANAGEMENT RESEARCH CENTRE

MISSION: To become a leading hospitality management research centre in the UK

AIMS OF HOSPITALITY MANAGEMENT RESEARCH
• To provide a research and consultancy service to the hotel and catering industry.
• To provide a mechanism for collaboration between researchers and practitioners in the industry.
• To develop knowledge about contemporary issues which confront the industry.
• To gather, categorise and analyse data of relevance to the industry.
• To fund the provision of academic research projects to MPhil/PhD level.
• To offer a high quality hotel and catering information service to Hospitality Management students and others.
• To use research and consultancy activities to enhance hospitality management teaching and to aid course development at undergraduate and postgraduate levels.

SCOPE OF THE RESEARCH
The main activities are:
• The undertaking of research and consultancy on topics relevant to expertise of the group.
• The organising and running of conferences, short courses, training sessions and seminars on contemporary hospitality issues.
• The presentation of learned papers to relevant bodies and the writing of scholarly works for publication.

TARGETS
1. ..............
2. ..............

4. Idealized influence or leadership by charisma
This means that the leader attempts to be a role model. Subject group research leaders have the potential to positively influence academic staff in/to research through their personal image and efforts. The expression ‘do as I do rather than do as I say’ would seem apposite. Most hospitality management research ‘leaders’ in universities have: research qualifications; considerable personal experience in research and deliver research conference papers and supervise research students; significant publication lists; experience of applying/obtaining research funds and have contacts with other researchers and research organisations. They are in a prime position to act as role models for others.
Another option here is for leaders to invite external role models into University subject group research environments. Ramsden (1998) suggests that leaders could ‘encourage visiting scholars who are known to be good mentors of academic staff’.

Both Moses (1985) and Ramsden (1998) indicate ways in which leadership can be exercised to encourage and stimulate high quality research. These are classified by Moses (1985) into funding, distribution of funds, facilities and encouragement (see Figure 6). These approaches have been marked accordingly in Figure 6 as components of both transformational and transactional leadership. However some of Moses’s approaches are unmarked as they resemble managerial approaches rather than components of leadership per se. This demonstrates the difficulty of distinguishing managerial responsibilities and duties from the leadership role.

Figure 6 indicates that it is not a case of either transformational or transactional leadership for the ongoing leadership of subject group research but that both are needed.

**Limitations to hospitality management research leadership**

A number of possible constraints on research leadership have been mentioned above. These include ambiguity in the job description and the expectations of the role; the individualistic and independent nature of much of an academics work; democratic participation and consensus decision-making and any conflicts which may occur between the demands of teaching, research and administration. The existence of such limitations is supported by Middlehurst (1993 pp.73-77) who associates the constraints on academic leadership to academic values, structures and processes.

*Figure 6 Examples of ways leaders can promote research via transformational and transactional leadership (Extended from Moses, 1985)*

<table>
<thead>
<tr>
<th>Funding</th>
<th>Liaison with fund-granting bodies</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Assisting staff with proposals (T1, T2)</td>
</tr>
<tr>
<td></td>
<td>Good advocacy within the University concerning departmental needs (T4)</td>
</tr>
</tbody>
</table>

| Distribution of funds         | To encourage new projects or new staff in recognition of productivity (t) |
|-------------------------------| Establishment of a research committee to consider internal applications for funds |

| Facilities Encouragement      | Ensuring adequate facilities for research (T1) |
|-------------------------------| Establishing regular research seminars (T1, T2, T3, T4) |
|                               | Monitoring and developing research skills via training or joint projects (T1, T3, t) |
|                               | Regular communication with staff over research and publications (T1, T3) |
|                               | Establishing an internal refereeing system for projects and publications (T2) |
|                               | Celebrating effort and success in attracting grants, publishing and making progress in research (T3, t) |

T1 – individualized consideration, T2 – intellectual stimulation, T3 – inspirational motivation, T4 – idealized influence, t – transactional leadership
Middlehurst (1993 p.73) suggests that such values as academic freedom, critical reflection and autonomy ‘may pose problems of ‘fit’ when linked to leadership.’ This may be especially relevant to research where the specialisation in a subject by an individual researcher may result in them becoming an expert and supreme in that subject. Few, if any, in the work place, or possibly in the discipline, may be able to challenge or influence this person. Academic researchers are usually left to arrange and determine their own research activities without recourse to anyone else. This is an embodiment of professionalism and could restrict the influence of a research leader. Furthermore the concept of critical reflection suggests that the authority of a research leader could be challenged by a researcher. In such settings research leadership might only be deployed effectively where researchers acknowledge and accept the authority of a leader to be legitimate.

Universities are characterised by the fragmentation of authority and by the recognition of initiative at different organisational levels. Such structural features often result in widespread leadership which may produce clashes and result in academic confusion. Personal experience in my own institution has shown this to be the case related to research. There are different ‘leaders’ for: strategic decision making related to the RAE; for researcher work loading and spending; and for possessing the hospitality research vision, setting the related research agenda and motivating researchers.

The presence of divergent interests amongst academics and the frequent existence of ambiguous goals at different levels within universities create potential limitations in the academic process for leaders. Middlehurst (1993 p.77) says though;

‘. . . the existence of ambiguity, a potential for conflict and for fragmentation, while making the leadership task more complex, more difficult and different in kind, does not necessarily imply that leadership cannot be exercised . . .’

Alternative conceptual frameworks and operational strategies may be required which recognise the distinctive characteristics and constraints of universities and of academia.

**Empirical research methodology**

As previously mentioned a reason for developing this paper is to provide a basis, and a spur, for empirical work. Having explored in conceptual terms the role and practice of hospitality management research leadership in universities the author’s intention is to utilise this in empirical research being undertaken as part of a Doctorate in Education. The central question of this research is: What is the role of research leadership in providing for success in hospitality management research in UK universities and are there generalisable best practices that can be applied across universities? From this a number of sub questions have been identified:

Issue Questions:
1. How do universities and academics view success in research in universities and to what extent is this applicable to hospitality management research?
2. What factors influence research success?
3. What is hospitality management research?
4. To what extent is leadership important to research success?
Topical Questions:
1. What do research leaders do, what are they expected to do, what are they perceived to be doing and what do they want to do?
2. What is their role and are their responsibilities?
3. What examples of effective/successful leadership of hospitality management research are there in universities?

Within this research the case study approach will be adopted. The case study an enquiry that investigates a contemporary phenomenon within its real-life context (Yin, 1989). Within this the importance of context is essential (Hussey and Hussey, 1997 p.65). It is intended to investigate hospitality management research leadership in an ‘old’ university and in a ‘new’ university. The specific research methods involve using documentary materials, questionnaires and interviews as instruments to collect data to answer the research questions.

On completion the research is expected to make a knowledge claim which relates to the nature of research leadership and it is anticipated that the practice of research leaders, particularly those in hospitality management, will be enhanced and that understanding of research leaders roles will be improved.

Conclusions

This paper is underscored by the argument that research leadership is relevant in universities today and that the leadership of hospitality management research by academic staff warrants investigation.

So what conclusions can be drawn from the discussions in this paper?

The first point is that our knowledge of the leadership of academic staff in hospitality management research, like research leadership more generally, is very limited and the lack of research and publication on this topic is far from commensurate with the increasing importance of hospitality research to both the general research community and to the hospitality industry. This paper represents a small, yet useful, step towards establishing a conceptual framework for the study of leadership of university academics in hospitality management research.

Over recent years a range of pressures and demands have been exerted on higher education in the British university system. These demands have had a tremendous impact on both educators and the system more generally and have resulted in many pronounced, important and widespread changes. These changes have effected many things including university context or culture, the numbers and kinds of students, the curricula, the quality and diversity of provision and the need for more and different research. One of the many consequences of the concern, amongst academics and other interest groups, with this change has been the resurgence of interest in leadership. As Middlehurst (1993 p.82) and Shackleton (1995 p.2) say leadership is closely linked to change through influence, group and goals. Hospitality management educators and researchers in universities have not been exempt from change and the need for them to focus on leadership is strong. The contention here is that research leadership can assist the process of change, by providing a vision and direction for research, by encouraging, developing, supporting and challenging individual and group researchers and by creating research opportunities. Influence, group and goals are identifiable here.
The aim of this paper was to develop an understanding of the leadership role in hospitality management research undertaken by academics at subject group level in universities. Based on the work of Burns (1978) a way of describing or conceptualising leadership is to distinguish it according to whether it is transformational or transactional. This framework has been theoretically applied herein to the leadership of research for a subject, i.e. hospitality management, group. The conclusion reached is that it appears that subject group research leaders can promote research on a continual basis by both transformational and transactional leadership processes. Also it is argued that while transformational practices are especially relevant in times of change transactional practices are necessary and associated with maintaining work practice and ensuring routine events run smoothly.

The intention is now to undertake empirical investigations to explore these notions further and, in particular, to investigate the actual expectations, perceptions, roles, practices and performance of research leaders. The presence of transformational and transactional leadership and the effectiveness of these processes in hospitality management research will be pursued and the transformational and transactional leadership model will be studied in the context of two university cases to ascertain what a research leadership role entails. Data will also be obtained to support or refute why the research leadership role is significant. In other words views like those of Middlehurst (1993 p.86) who claims that leadership is ‘relevant to the development and implementation of research programmes’ will be field tested.

References


The relationship between employment and tourism education: issues for debate

Adele Ladkin, reader in tourism

Abstract

This paper examines four issues regarding educating people for employment in the tourism industry. Given the rapid growth in both the tourism industry and tourism education, there is a clear need to explore the relationship between these two elements. The paper takes a labour market approach to the role of tourism education, and examines the relationship between employment and education in the tourism industry. The labour market approach takes the view that employment opportunities are a guiding principle in the development of tourism education. In pursuit of its aims, the paper is organised in three sections. The first section introduces employment and education relationships and explains the complex nature of the interaction. Section two considers four issues in order to explore this complex relationship. These issues are, vocational education versus learning by experience; how to match educational output with employment opportunities; tourism qualifications and labour market signals; and tourism curriculum design. Set against these debates, the final section reviews the issues facing tourism educators regarding the relationship between employment and tourism education at the practical level. The paper concludes that as labour provides the service experience that is an integral part of the tourism product, appropriate education for the tourism workforce is a vital ingredient for the development of the industry.

Keywords: Labour markets, Employment, Tourism Education

1 Dr. Adele Ladkin, Reader in Tourism, International Centre for Tourism and Hospitality Research, School of Service Industries, Bournemouth University, PO Box 2816, Poole, Dorset, BH12 5YT, UK. Tel: +44 1 202 595158, Fax: +44 1 202 595228. E-mail: aladkin@bournemouth.ac.uk
INTRODUCTION

The purpose of this paper is to examine four issues regarding educating people for employment in the tourism industry. At the beginning of the twenty-first century, tourism educators are in the enviable position of witnessing both a growth in the tourism industry worldwide and the expansion of tourism employment, and a corresponding growth in the number of tourism courses. As education is the major platform for the development of human capital for industry, there is a clear need for further examination of the relationship between tourism employment and tourism education.

In pursuit of its aims, the paper is organised in the following way. First, the labour market approach is explained in order to provide the framework for the discussion. This is followed by an introduction of employment and education relationships both at the broad level and in relation specifically to tourism. In order to explore this complex relationship, four issues are identified. These are, vocational education verses learning by experience; how to match educational output with employment opportunities; tourism qualifications and labour market signals; and tourism curriculum design. Finally, the paper reviews the issues facing tourism educators regarding the relationship between employment and tourism education at the practical level. A number of conclusions are drawn.

THE LABOUR MARKET APPROACH

The relationship between employment and education is a widely debated subject which has been explored from the perspective of tourism educators, largely as a result of criticisms by industry that educational courses are not meeting the required needs of the industry (Goodenough and Page, 1993; Cooper and Shepherd, 1994; Cooper and Shepherd, 1997). Ritchie (1992) identifies that top of the list of priorities for tourism educators is the need to strengthen links with industry and to provide more continuing education for those already working in travel and tourism. Given the wealth of research on the employment and education relationship, there is a clear need to make advances in the way in which we explore the interaction between the two elements. If tourism education is to be taken seriously as a worthwhile mechanism to provide the workforce with the right skills for the tourism industry, the importance of the employment and education relationship cannot be ignored.

One of the ways in which our understanding of the relationship could be advanced is to adopt a labour market perspective in the exploration of the relationships between employment and tourism education. The labour market approach is not new, and has previously been used to examine a range of issues relating to tourism and hospitality employment. For example, Ladkin and Riley (1996) examine the career paths of hotel managers using the labour market approach, Riley (1993) examines the relationship between labour markets and vocational education, Riley (1996) uses the labour market as the focus for an approach to human resource management, Sellah, (1995) examines the career paths of chefs in Malaysia, and Szivas and Riley (1999) take a labour market approach to study tourism employment in the case of Hungary. In all of these approaches, an understanding of the labour market is central to the understanding of education, careers and mobility in the industry. The labour market approach simply takes the view that employment opportunities are the guiding principle for the development of tourism education. This means that in effect, the industry itself should determine the development of educational courses, and it is the nature
and availability of tourism jobs that shape the course of tourism education. The labour market approach argues that the development of tourism education must be guided by the needs of the tourism labour market.

**EMPLOYMENT AND EDUCATION RELATIONSHIPS**

There is little doubt that education has much grander ideals than simply the preparation of individuals for employment. At its best, education is concerned with the development of the individuals full range of abilities and aptitudes, with the cultivation of spiritual and moral values, with the nurturing of imagination and sensibility, and with the transmission and reinterpretation of culture (Watts, 1985). However, aside from these ideals, it has to be acknowledged that education has a close relationship with the world of work. Schools and colleagues have a responsibility to societies in order to develop the skills, knowledge and attitudes that will enable individuals to contribute to the economy, and a responsibility to parents to help their children gain employment. The association between working hard at school in order to get a good job is one that is commonly perpetuated in the British Education System (Watts, 1985). In his assessment of the links between education and employment, Watts (1985) identifies four functions which educational institutions can play in relation to employment; selection, socialisation, orientation and preparation. **Selection** refers to the achievement of status through education, in terms of how education can be used to select individuals for specific jobs. **Socialisation** refers to the way in which educational institutions can influence student's attitudes to the world of work, and to their own function within it. **Orientation** refers to the deliberate curricular interventions designed to help students understand the world of employment, and finally **preparation** refers to the promotion of specific skills and knowledge which students will be able to apply in a direct way after entering employment. It is this final preparation function of educational institutions in relation to employment that sets the scene for the role of vocational education.

There is a wealth of research that has examined the relationship between employment and education, the focus of which is on ways in which employment and education can forge greater links and work together (Jones and Jenkins, 1999; Tilley and Johnson, 1999). Indeed, the Higher Education Funding Council for England (HEFCE) has as one of its objectives the development and sustaining of effective partnerships with institutions, employers and professional bodies through collaboration, in order to enhance the relevance of teaching and research to the needs of employers and the economy.

Within tourism, there is a body of research that has focused on the links between employment and tourism education, and there are many important issues to be faced by tourism educators that have been identified and documented (Airey, 1999). One of these issues is the need to improve the relationship between the tourism industry and education. The education-industry interface is a complex one, which results in a number of challenges for the sector. According to Cooper, Shepherd and Westlake (1994) these challenges can be summarised as follows. The first challenge is the diversity of the industry in terms of sectors and size. This means there is no real agreement on definitions between industry, educators, and the government as to what constitutes the industry, which makes the development of educational programmes problematic. Despite this, the education-industry relationship is better defined at the lower levels of training. The definition of skill-based and technical expertise is easier to identify and to fit within education curricular. Second, it is difficult to develop links with one sector of the industry without alienating the other, so a decision has to be taken as to whether to develop specialist or generalist programmes. Third, there is no
guarantee that the sector as a whole is interested in employing graduates. Fourth, the tourism industry is dominated by small businesses, and every-day operating costs and pressures leave little time to invest in training or education. Finally, there is often mistrust of education, as many of the employers themselves may have had little formal training or education.

Despite these difficulties, a number of authors have identified ways in which education and industry interact. Shepherd and Cooper (1994) identify four main areas of interaction; the need to identify industry requirements, work placements schemes, curriculum planning issues, and ways in which tourism educators can update their industry knowledge. Botterill (1996) identifies five main areas of interaction; student placements, staff exchanges and collaboration, industry advisory panels, graduate recruitment, research and consultancy, and student projects. Haywood and Maki (1992) identify a conceptual model of the education/employment interface for the tourism industry, based on the expectations and perceptions of a number of stakeholders.

Although a detailed review of all the areas for industry and education interaction is beyond the scope of this paper, a number of central themes can be identified. The first one of these is recruitment, both in terms of whether graduates gain jobs in the industry (Council for National Academic Awards 1993), and the concern of the over supply of tourism and hospitality graduates (Airey and Johnson, 1999). Industry and education need to work together to ensure that the needs of both of the stakeholders are met. Recently, there has been considerable research into the changing recruitment needs of the industry in terms of supply and relevant skills (Ogoreic, 1999).

The issue of recruitment is linked to the second area key area for interaction, which is providing the industry with the appropriate skills in the workplace. There is much research regarding skills that are appropriate for the industry (Baum, 1990; Messenger, 1991; CNAA, 1993; Cooper and Shepherd, 1997). The debate centres around whether it is necessary to have tourism knowledge and skills to work in the industry, or generic management skills, and which skills industry requires. The opinions of the industry sector is crucial if educators and to meet the needs of the tourism and hospitality workforce.

One of the ways in which educators can ensure they are providing the right skills for graduates is industry involvement in course design, which is the third important area for interaction. Increasingly, educational institutions are seeking an industry input into curriculum and course design, in an attempt to overcome the problems stated above (Shepherd and Cooper, 1994). Industry advisory panels are one of the ways in which this can be achieved (Botterill, 1996).

The fourth key area of industry and education interaction is in terms of work placements and work experience. These aid the recruitment process and are important in preparing students for employment after graduation. Mulcahy (1999) states there are three parties involved in work experience, the educator, the employer and the learner. This relationship is a complex one, which whilst beneficial to all parties, can often result in a mismatch of expectations. Leslie and Richardson (1999) in a study of work experience in tourism undergraduate programmes found that many placements were failing to provide students with the range of experience they were hoping for. Furthermore, with the increase in higher education courses, employers are under more pressure to provide work placements (Cooper and Shepherd, 1997).
Finally, the industry and education can interact in terms of providing on-going training to companies and services to business. These include industry secondment for educators and training and professional courses for companies (Shepherd and Cooper, 1994). Regional economic and training needs and institutes of enterprise are being developed to build stronger links between universities and industry (Messenger, 1991).

What many of the above issues have in common is the idea that the relationship between employment and education is characterised by a number of conflicting needs. As a form of vocational education, tourism education has to achieve a balance between three main things; the need to promote individual development, the need to advance tourism knowledge, and the need to be relevant and practical to the industry (Riley, Ladkin and Szivas, 2002). Ultimately, students of tourism mostly aim to achieve employment in the industry, and somehow tourism education must work towards this aim whilst recognising the other two needs. In a sense, these different needs represent the needs of different stakeholders. According to Cooper and Westlake (1998) the stakeholders identified in terms of tourism education are the government, the industry, the institutions, and the students. Riley et al (2002) argue that the academic community represent the needs of knowledge and individual educational development, and the industry assures that the courses are relevant to the industry. However, the relationship is not a simple one, and the varying interests lead to power struggles and conflicts (Cooper and Westlake 1998). Furthermore there is an issue regarding how industry needs are represented in education, it could be either prominent organisations or dominant people who provide the input (Riley et al, 2002). Despite the number of studies that examine the way in which industry can interact with educational courses, (Shepherd and Cooper, 1994; Cooper, Shepherd and Westlake, 1994; Goodenough and Page, 1993), few empirical studies exist which examine to what extent the industry feels their input is followed through in the design of tourism courses.

As the employment and education relationship is a complex one, four issues for discussion have been identified by Riley et al (2002) as being important to our understanding of the relationship. Taking the labour market approach, these are; the value of vocational education versus learning by experience, matching educational output with jobs, tourism qualifications and labour market signals, and tourism curriculum design. These represent the main areas for debate when considering the relationship from a labour market perspective, and are considered here in turn.

**THE VAULE OF VOCATIONAL EDUCATION VERSUS LEARNING BY EXPERIENCE**

The debate relating to this issue concerns to what extent industry should provide the training ground for jobs in the industry, and what skills and knowledge should be included in educational courses. There is little doubt that vocational education has an important role to play in the development of human capital. However, there is also substantial evidence to suggest that skills and knowledge in tourism can be accumulated by experience rather than through education (Sellah, 1995; Ladkin and Riley, 1996; Ladkin, 2000). Furthermore, evidence also exists to suggest that it is general numeric and communication skills that are considered important for the industry, rather than vocational education (Tas, 1988; Baum, 1990; Hsu and Gregory, 1995). Given that certain skills may be better learned from work experience, and others from education, there is a need to ascertain the point at which education and experience duplicate. This would ensure that the correct resources are best put to use for the development of a range of skills. This does cause problems related to identifying
exactly which skills are required, and precisely where the skills and knowledge are learnt. However, the idea of vocational courses including a work placement element does go some of the way in addressing the balance.

The relationship between education and experience is further compounded by the continued debate between education and training (Riley et al, 2002). The distinction between these two elements and the implications this has for tourism education and training have been well documented, for example, Messenger, 1991; Ritchie, 1992; Shepherd and Cooper, 1995; King, 1996). In tourism education, essentially it is the lower levels of education that provide training, and the higher qualifications that are considered more in line with education. The emphasis on these two different elements has practical applications in terms of course design and delivery.

MATCHING EDUCATIONAL OUTPUT WITH JOBS

If we take the labour market approach which suggests that employment in the industry should be the guiding principle for the development of tourism courses, when considering the relationship between employment and tourism education, there is a need to match educational output with jobs. This is problematic for two main reasons. First, previous research indicates it is very difficult to segment the tourism industry into distinct sectors and occupations (Airey and Nightingale, 1981; and Medlik, 1993). This is due to the diversity of the sector and the diversity of occupations. Second, although some institutions have successful alumni and correspond with students on tourism courses, little is known about what happens to people after completion of educational courses. Furthermore, few employees keep in contact with educational institutions, so there is no feedback on the suitability of employees. Therefore, it is virtually impossible to measure how well tourism education prepares people for jobs in tourism occupations. It is possible to study the role of education in career development within one particular occupation, but such studies are not practical for all tourism jobs (Tarpey, 1994; McKercher, 1995; Ladkin, 1996). Riley et al (2002) put forward a default argument, which is to say that if students get the jobs intended for them, all is well in the curriculum. If students gain employment, this proves that the output must be what is required. From the little evidence available, it appears that students of tourism do indeed find jobs in the industry at a variety of different levels. Therefore, it could be argued that educational courses are currently providing the right outputs for the tourism industry. Further research in this area is required.

TOURISM QUALIFICATIONS AND LABOUR MARKET SIGNALS

The third issue for debate concerning employment and tourism education is the idea that credentials in the industry are not easy to identify. Although there are recognised qualifications in the tourism industry, the industry does not depend on them in the way that other industries such as engineering do. This means that signals from the market are not easy to see, and also it affects the actual process of matching people to jobs (Riley et al, 2002). Tourism credentials are not easily recognised, due to the fact that particular domains of knowledge are not confined within particular occupations. In the tourism industry, knowledge transcends occupations and is broader than the concept of the job (Riley et al, 2002).

A lack of credentials for tourism has four main effects. The first one is positive in the sense that it reduces barriers for job seekers. However, the second one is that it is difficult to match people to jobs, for the reason given above. Thirdly, in the tourism industry, occupational titles say little about the kinds of skills needed for each job, for example, it is not
easy to tell from a job title like 'tour operations manager', to see what exactly the job entails and what skills are required for the occupation. The fourth effect relates to the fact that one of the most common signals from any labour market is that change in the levels of pay act as an indicator of the state of the market and opportunity. However, in the case of tourism employment, it is not easy to see the relationship between the level of education and earnings. The levels of pay in the industry vary enormously across both different industry sectors and between companies within the sector. A combination of these four factors means that labour market signals are hidden, which in turn makes it difficult to match tourism qualifications with tourism jobs.

TOURISM CURRICULUM DESIGN

If vocational education has to be relevant to the job, then there is clearly a need to define what is ‘relevant’. This is not an easy task, as has already been stated, as the different stakeholders who have an interest in the industry may feel that different elements are relevant.

In terms of the actual content of tourism courses, there is a continued debate about what should be taught and which disciplines should underpin the content of tourism courses. Obviously, the content of tourism courses is dependent upon a number of factors, for example, level of qualification, whether the focus is on education or training, or has a business or academic focus. However, it is the debate surrounding the ‘core curriculum’ that is one of the most influential.

The idea of establishing a core body of knowledge for tourism has been debated for almost as long as tourism has been studied (Airey and Johnson, 1999), and the history of the debate is well documented (Airey and Johnson, 1999; Holloway, 1995). In the context of the UK, a tourism core curriculum is advocated in the higher education sector because of the diversity of courses in this sector. It is probably safe to assume that the desire for a core curriculum comes from educators rather than market signals. The core body of knowledge for tourism identifies the main subject areas that are considered important. This has been modified and developed over the years by a number of bodies, but most importantly, Burkart and Medlik (1974). The Tourism Society (1981), the CNAA (1993) and the National Liaison Group for Tourism (1995). Airey and Johnson (1999) identify that these three initiatives provide the most commonly agreed definition of what is meant by a core body of knowledge for tourism. This is outlined in Table I.
Taking the core curriculum identified by the NLG in 1995, these areas have been accepted as important for study by both academics and practitioners in the tourism industry. Briefly, the meaning and nature of tourism refers to definition, social and other conditions and determinants of tourism, and tourism motivations. The structure of the industry describes the interrelationships of the main components sectors of the industry and there operating characteristics. The dimensions of tourism and issues of measurement refers to scope, geographical knowledge and perspectives, patterns and determinants of demand and other resources for tourism. It also explores the sources of data and the management of information. The significance and impact of tourism examines economic costs and benefits of tourism, along with the social and environmental consequences. The marketing of tourism looks at the application of marketing theory to tourism. Tourism planning and management examines destination and site planning, partnership issues, and sustainable tourism. Finally, policy and management in tourism examines public sector policy, organisations in tourism, and visitor management issues.

Two themes emerge from the analysis of the core body of knowledge. The first is that tourism is a subject rather than a discipline. The subject draws from a number of disciplines, for example, Geography, Economics, Anthropology, Sociology and Psychology. Most of the social science disciplines are evident in the tourism curriculum in some shape or form. The second theme is that the perspective on management is at the industry level. The management of specific units, like for example, food and beverage operations, is not a strong feature.

The way in which all curriculum need to be analysed is in terms of how they secure the balance between an emphasis on business and on the tourism context. In other words, how

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Historical development</td>
<td>What is tourism</td>
<td>The meaning and nature of tourism</td>
</tr>
<tr>
<td>Anatomy of tourism</td>
<td>Historical development of tourism</td>
<td>The structure of the tourism industry</td>
</tr>
<tr>
<td>Statistics of tourism</td>
<td>Determinants and motivations in tourism</td>
<td>The dimensions of tourism and issues of measurement</td>
</tr>
<tr>
<td>Passenger transport</td>
<td>Statistical measurement and dimensions</td>
<td>The significance and impact of tourism</td>
</tr>
<tr>
<td>Accommodation</td>
<td>Significance of tourism</td>
<td>The marketing of tourism</td>
</tr>
<tr>
<td>Tours and agencies</td>
<td>Component Sectors</td>
<td>Tourism planning and management</td>
</tr>
<tr>
<td>Marketing in tourism</td>
<td>Marketing</td>
<td>Policy and management in tourism</td>
</tr>
<tr>
<td>Planning and development</td>
<td>Physical planning and development</td>
<td></td>
</tr>
<tr>
<td>Organisation and finance</td>
<td>Organisation</td>
<td></td>
</tr>
<tr>
<td>Future of tourism</td>
<td>Finance</td>
<td></td>
</tr>
</tbody>
</table>

Source: Airey and Johnson (1999)
the integration of disciplines is matched against the need for commercialism. The reality is that courses have to attract students and be viable in the commercial environment. Those with a vocational focus are more attractive to prospective students. This encourages tourism education to remain firmly as a vocational subject, rather than in the development of academic knowledge (Riley et al, 2002).

**PRACTICAL CONSIDERATIONS**

Whilst providing areas for debate, the above issues have a number of practical implications for the tourism industry and tourism educators. The value of vocational education is something that is important for the industry, as vocational education provides the platform for the development of human capital. The practical issue here is to devise some mechanism for measuring at what point vocational education should cease, and industry experience becomes a better way of learning skills. Whilst some overlap is inevitable and not necessarily detrimental, there are obvious implications for resources. Furthermore, educators are perhaps not always the best people to teach certain practices, as invariably their industry experience becomes dated over time, or they may not have the relevant infrastructure within the educational institution. Work placements go some way to addressing this issue, but there is perhaps scope for new initiatives.

The issue of matching educational output with jobs at the practical level means that if tourism education is achieving its aims, all those people with tourism qualifications should be entering the occupations of their choice. This is a call for two improved practices. The first is for educational institutions to strive to keep records of the career paths of former students, and to gain feedback from employers in the tourism industry with regard to expectations. The second relates to the debate identified previously by Airey, Ladkin and Middleton (1993) who question whether there are the employment opportunities available for the increasing number of tourism graduates. The continued expansion of tourism courses and the tourism industry is questionable, and certainly educators may be faced with declining student numbers. Over provision of tourism courses is already in sight.

In terms of tourism qualifications and labour market signals, the lack of credentials for tourism is that is positive in the sense that it reduces barriers for job seekers. Furthermore, perhaps the obsession with tourism courses providing labour for tourism jobs is misguided in the sense that tourism courses, like many generic management courses, provide people with a wide range of transferable skills. Perhaps the way forward for tourism educators is to emphasise this transferable element to many service sector industries. This is particularly significant in the light of the potential for over provision.

The practical issues arising from the curriculum development debate are clear. The needs of the industry and the other stakeholders are finally balanced, and ultimately the tourism educational courses must be attractive for students and profitable for educational institutions. This point is likely to ensure that tourism courses will remain with a strong vocational focus. However, in order to remain current and to develop tourism as an academic subject in its own right, the continual review of tourism curriculum should be encouraged.

Finally, the above issues cannot be considered in isolation. There are further concerns that tourism educators have to face at the practical level. These include methods of delivery for tourism courses, funding for tourism education programmes, the lack of trained staff to teach the courses, and issues of quality (Airey, 1999).
CONCLUSION

The theme of this paper has been to raise some issues for debate regarding the relationship between employment and tourism education. As a vocational subject, the approach has argued that a labour market perspective is required in order to advance our understanding of the relationship, and that employment opportunities should be the guiding principle in the development of tourism education. If tourism courses continue to present themselves as 'vocational' the needs of the labour market cannot be ignored. Therefore, it is the labour market that should determine the number, type, level, and content of tourism educational programmes. The study of tourism as an academic subject in its own right lies outside the debate.

One factor remains without question. This is that it is labour that drives the industry and provides the service that is a vital and integral part of the industry, and often the tourism labour has a direct effect on the quality of the tourism service. Consequently, effective and appropriate tourism education for the tourism workforce is an essential component of the drive for improvements and the development of the industry. Perhaps one way forward for an improved understanding of employment and education relationships comes from an understanding of tourism labour markets. An analysis of labour market signals and behaviour may help educators to devise a product that can be responsive to the needs of the labour market and meet the needs of the various stakeholders.

REFERENCES


The GNVQ in leisure and tourism:
investigating student perspectives

Philip Gibson, MEd, Cert Ed, MHCIMA, University of Plymouth.

Abstract:

This paper is based on a longitudinal research project aimed at developing an understanding of students’ lives in the context of learning and Further Education. A group of students, enrolled on a GNVQ in Leisure and Tourism in September 1996, were interviewed over a three-year period. The resultant cases present a student’s view of the world often at odds with the educational model within which they are expected to reside. A range of elements including: aspiration, culture, and learning are investigated against the continuum of time, to provide an insight into the complexity of life for a young person living, working and learning in the United Kingdom. The tensions and dilemmas that are highlighted provide useful lessons for us all, as well as a reminder to be vigilant in the face of pressures that can commodify learning inappropriately.

This work can be set against current policy. We live in an era of high aspiration, as typified by a British government green paper ‘The Learning Age: A Renaissance for a New Britain’ (Department for Employment and Education, 1998). This paper sets markers for learning including: personal development for everyone, social inclusion and a national skills agenda for economic development. However, these seemingly noble and ambitious claims are, according to Dimbleby and Cooke (2000:55), undermined because ‘our national thinking with regard to curriculum and qualifications is still tied to nineteenth-century views of intelligence and ability.’

Key Words: further education; vocational education; GNVQ; leisure and tourism.
GNVQs – an emerging model for vocational education

General National Vocational Qualifications (GNVQs) were introduced to England and Wales in 1992 as a natural development of National Vocational Qualifications (NVQs). GNVQs were intended to sit in the space that existed between educational provision (General Certificates in Secondary Education (GCSEs) generally undertaken by 16 year olds and A levels generally undertaken by 18 year olds) and vocational work based training (NVQs).

The GNVQs were available at three levels: foundation, for students with no attainment in GCSEs; intermediate, for students achieving 2 D grades at GCSE; and advanced, for students with 4 C grades at GCSE. The qualifications were intended to be either school or college based and could be offered for thirteen vocational areas including Hospitality and Catering and Tourism and Leisure. The expectation was to create a qualification that could finally lay to rest criticism about the vocational educational divide (Avis et al 1996). The nearest equivalent advanced Further Education (FE) qualification at that point had been the BTEC National Diploma, a qualification that went into decline in terms of availability when the GNVQ was launched.

Where NVQs were competence based, GNVQs were outcomes based. This subtle difference was intended to allow for students (or candidates as these individuals were called) to convert their GNVQ to an NVQ when they could apply their learning in the workplace and demonstrate competence. Outcome related learning was intended to show evidence that the candidate had some practical experience and knowledge but was not intended to say that the candidate could do the job. NVQs were intended to provide the evidence that having gained employment the GNVQ candidate was becoming competent through practice. This intention appears from both published sources and anecdotal evidence to have been singularly unsuccessful. Hyland (1994), Pring (1995) and Smithers (1993) are critical of this educational model that they believed to be seriously flawed and bedevilled with an instrumental approach that presents an assessment model design that inhibits ‘intellectual innovation’.

GNVQs were intended to consist of learning applied to practical activities (Smithers and Robinson, 2000) and initially were imbued with the language of NVQs. Yet, despite the implied vocationalism, work experience did not feature strongly for the qualification being an optional element only (Avis et al 1996). The attempt to promulgate GNVQs in schools to broaden the appeal of the qualification appears to have resulted in a narrowing of the uptake of types of GNVQs. As schools competed with Colleges of Further Education (CFE) to retain their pupils and the valuable funding that this created, Business, Health and Social Care and Leisure and Tourism dominated as popular choice (see table 1). All were relatively low cost in terms of resource and could be taught or managed by existing teams without significant development.
Table 1: Numbers of students enrolled on a two year Advanced GNVQ in September 1998. Source: DFEE (2001).

<table>
<thead>
<tr>
<th>GNVQ Advanced</th>
<th>Number enrolled 998-2000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>14074</td>
</tr>
<tr>
<td>Leisure and Tourism</td>
<td>9390</td>
</tr>
<tr>
<td>Health and Social Care</td>
<td>7741</td>
</tr>
<tr>
<td>Information technology</td>
<td>6196</td>
</tr>
<tr>
<td>Hospitality and Catering</td>
<td>1843</td>
</tr>
<tr>
<td>Built environment</td>
<td>608</td>
</tr>
<tr>
<td>Science</td>
<td>571</td>
</tr>
<tr>
<td>Performing arts</td>
<td>334</td>
</tr>
<tr>
<td>Retail</td>
<td>272</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>260</td>
</tr>
<tr>
<td>Media</td>
<td>169</td>
</tr>
</tbody>
</table>

Despite the competition general FE Colleges and tertiary colleges enrolled the largest number of students (see figure 1) drawing attention to the fact that the trend towards the three most popular GNVQs was equally evident in FE as in schools.

Figure 1: Student numbers for all advanced GNVQs enrolled by type of institution in 1998. Source: DFEE (2001).
Ron Dearing (1995) conducted a review of qualifications for 16 – 19 year olds and made recommendations for an overhaul of further education based on integration of academic and vocational education. His study was based on the findings of two other reviews; firstly Capey (1995), who was charged by the government of the day into looking at GNVQs and secondly Beaumont (1996) who undertook a similar exercise with NVQs.

Capey criticised the design of GNVQs from a number of angles. In terms of assessment, the qualification was seen to be almost pedantic in focusing on the breadth of unit content. His recommendation was to redefine radically the assessment. His suggested aim was to modify the external assessment so that it contributed to grading and moved away from the multiple-choice model towards an essay or report style. The general balance of assessment should be unit rather than element based and the overall quality of the tests should be improved.

Capey also severely criticised the language of the qualification that he felt was not accessible to all. He noted that guidance for teaching, learning and assessment was insufficiently supported and that ‘core skills’, generic skills that included communication, application of number and information technology, required more planning to enable staff to be able to develop these skills in the vocational context.

Dearing endorsed many of Capey’s recommendations and developed the issue relating to articulation between GNVQs and NVQs. He proposed a new framework for academic, vocational education and training that could follow one of three options: to continue to develop the A level, GNVQ and NVQ; to design some form of certificate on the basis of the afore-mentioned qualifications or combinations of these; or to specify a pattern of study through an advanced diploma with a required combination of a science and/or maths subject, an arts subject, a modern foreign language, a social science subject and key skills.

The Wolf Report (1997) identified that in most schools and colleges only four GNVQs were being offered: business; health and social care; art and design; and leisure and tourism. Professor Wolf stated in her report that GNVQs failed to achieve the academic status of A levels or to provide a genuine route to a job for school leavers. The report continued that students who did enter employment on completing GNVQs rarely found work in a related field. Further to this, GNVQs failed to attract more young people into vocational education than had been the case with previous qualifications, had high drop out rates and offered nothing to adults. Only one fifth of students on GNVQ courses progressed to Higher Education (HE). Following a survey of students studying GNVQs at intermediate level, Steedman and Rudd (1998) are wary of making claims that attainment levels at point of entry affect drop out from courses. They believe that commitment and motivation to succeed appear to be as, if not more, important than academic entry qualifications for success on the GNVQ.

Williams (2000) identifies the relative positive manner that GNVQs are met with by admissions tutors in HE. However, she is concerned that many HE tutors state that GNVQ candidates often have problems coping with the demands of Higher Education. She says these concerns are predominantly about critical thinking and critical analysis skills.
Advanced Vocational Certificates of Education (AVCEs)

Advanced Vocational Certificates of Education (AVCEs) (and new model GNVQs at foundation and intermediate levels) were introduced in September 2000. The terminology was important for these rebranded Advanced GNVQs as the message was that AVCEs or vocational A levels now occupied a position that by name was asserted to be the equivalent of Advanced General Certificates of Education (A levels). The AVCEs consist of 12 units and key skills and incorporate many of Capey’s and Dearing’s recommendations relating to the language, the assessment regime and the scale.

AVCEs were introduced as single awards (6 units) and full awards (12 units) and in pilot subjects as three unit qualifications. Key Skills do not contribute towards the award but are a separate qualification that provides points for HE admissions purposes and in funding terms provide income to support colleges in the delivery of key skills, tutorials and enrichment. There is a funding trap for CFEs because tutorials that are thought of as vital and enrichment that is considered valuable cannot be funded without key skills. This is but a snapshot of the current picture that will undoubtedly see further developments in similar fashion to the last decade. For tourism, an important development to note was the redefinition of award that saw the Advanced GNVQ in Leisure and Tourism becoming two distinct qualifications, the AVCE in Leisure and Recreation and the AVCE in Travel and Tourism.

Clearly, GNVQs have been unable to emulate what Smithers (2000) believes to have been the success of the Ordinary National Certificates and Diplomas (later to become Business and Technology Education Council National Diplomas). Sharp (1998) warns that a distinct problem that has arisen from the debate surrounding GNVQs, and the way they were designed, introduced and developed, is the tendency to ignore the successes. This is an interesting point because, for many, the successes and strengths of the National Diploma were similarly ignored at the time when GNVQs were introduced. As Dewey (1938) postulates, ‘there is always a danger in a new movement that in rejecting the aims and methods of that it would supplant, it may develop its principles negatively rather than positively and constructively’ (p6).

Colleges of Further Education

Over the last 10 years there have been seismic changes in Further Education. Concomitant with new qualifications such as NVQs and GNVQs and the arrival of schools as competitors in this field, the sector has had to live with incorporation and a complex funding regime operated by the Further Education Funding Council. Although this regime is now history and has been supplanted by the Learning and Skills Council, the impact has been significant.

McGavin (2000) reports the emerging Learning and Skills Council saying that the FEFC system had led to colleges chasing units of funding rather than focusing on numbers of learners and what they learn. ‘Unit farming’, a process whereby consultants charge to find unclaimed units became part of the jargon and all in all, as Smithers (2000) expresses, for many, the funding regime was overly complex and lacking in a strategic mission. In the College that provides the setting for this research project, consultants were brought in on two occasions to search for ‘lost units’. The college management had serious concerns about learning agreements, the document used to list learning choices for each student and to claim for funding for the learning. The concern was that these learning agreements were
being inaccurately completed by course tutors and the resultant income for units of funding was not being claimed.

The atmosphere of intense competition promoted by the funding council between 1992 and 1997 and the need to maximise income, had led to increased student recruitment but created a by-product of poor retention and completion (Tysome 2001). By July 2000, this retention and completion pattern was being arrested but the total numbers of students in Further Education was falling. McGavin (2001) reported this downward trend and noted that college principals were pessimistic of the sector’s ability to hit government targets unless a change was made to the funding system. In a letter to the Times Educational Supplement (2000), Lisa Dean, the Director of Finance of Tower Hamlets College, responds to the Audit Office’s report on financial difficulties in FE Colleges by pointing out the complexities of the funding methodology. She says this methodology is difficult to forecast, it changes retrospectively and yet, it has led to a situation, where Colleges are blamed rather than the FEFC.

**Understanding student lives**

A longitudinal research project was undertaken between 1996 and 2001 to investigate the lives of Advanced GNVQ Leisure and Tourism students in a College of Further Education (CFE) in the south west of England. The theoretical basis for this work takes its roots from what Crotty (1998) describes as the epistemology known as constructivism. This theory of learning is founded on the premise that we construct our own understanding of the world we live in by reflecting on our experiences (Phillips, 1995). The research was a practitioner based enquiry (Murray and Lawrence, 2000 and Cohen et al, 2000) that was focused initially on exploratory research and grounded theory (Glaser and Strauss, 1967). Theoretical perspectives included consideration of situated learning (Lave and Wenger, 1991) and learning careers (Bloomer and Hodkinson, 2000). A multi-method approach to data collection was designed to expose students’ experiences. This generated predominantly qualitative data. As part of this project, eight students were interviewed at three points: after enrolment, midway through their course and after they had left their course. The resultant cases that were constructed provided an interesting insight into young peoples’ lives.

Throughout the project, the lives of the students who agreed to participate in the interviews changed (often dramatically). Two students left at the end of the first year and one withdrew towards the latter stage of the second year. Of those students who completed, two proceeded to University to undertake undergraduate degrees in Tourism Management. One of these withdrew after approximately six months. Two enrolled on Higher National Diplomas (HNDs) in Leisure Management (again one student left after six months). One student was employed by an airline as a sales and reservations assistant.

When asked about options for choices when leaving school, the students described alternatives that were relatively stark. Students were faced with going to employment or continuing in education. If students decided to proceed with education, the next consideration was type of study. For many, A levels or GNVQs were juxtaposed in simplistic terms as revision and exam heavy compared to revision and exam light. Thereafter if selecting a vocational area there were other potential options. In terms of vocational employment, leisure and tourism was compared to hospitality and catering with the former attaining predominance as an attractive employment area.
Some of the students had gone to a comprehensive school having failed to achieve an 11 plus score that would have given them entrance to a selective school. The local education authority is one of a few that provides a selection exam that leads to students being offered places in either a grammar school or a comprehensive school. Many said that they had not done well in their GCSEs. Some were wary of the processes of academic study. On the face of it the choices are limitless but for each student with their perception of who they were, what they felt they could do and where they saw they were likely to go, the options were narrow.

The students entered Further Education (FE) with a limited knowledge about the vocational area they had selected. Their choice had been based on seemingly superficial factors, such as a desire to travel linking to tourism or an enjoyment of sport linking to leisure. The students all felt they made the decision themselves as individuals. When students commented about external advice it was apparent that this played a marginal part and was internally catalogued as additional information when choice was being considered. Careers tutors or teachers seemed to have minimal impact on the decision making process.

The choice that was made for each individual was not necessarily casual. The students made the choice taking into account the varying circumstantial factors that existed in their lives. Location, or how easy it was to travel to college was seen as being important. Indeed for one student, the barrier of location was insurmountable, and she withdrew from her course. Selecting GNVQ over A levels was seen as being a positive move to avoid what was perceived to be a possible weakness. Students were convinced that they would fare badly because they were concerned about their ability to revise and sit the A level exams successfully. These perceptions were partly related to experiences with GCSEs.

Continuing in education was a life choice that for some was to do with control and being able to decide what to do with time. For others there was a sense of either staying young (education is synonymous with childhood) or perhaps on the other hand, not growing old. For both these types of student there was a semblance of suspending the inevitable. In due course they would have to change but FE provided a chance to delay the unavoidable.

There were a number of cases when students selected the course because of the course manager or the college careers officer. In these cases it should be noted that in the competitive environment within which this college exists, student numbers were associated to college employees’ jobs. At the time, the GNVQ in Leisure and Tourism was also being offered at two sixth form colleges with rumours of other GNVQs in Leisure and Tourism being introduced in successive years.

Notions of career were limited. Some students talked of their growing knowledge as they spent more time on course. This knowledge meant that some had discarded ideas held previously. This could be seen in Student C’s case when she reveals that she has become disillusioned about her original aim of being a flight attendant on the grounds that this job provided few real opportunities to see the places visited.

In the majority of cases, students were no nearer being sure what they wanted from their careers at the end of the course. Some held aspirations about management, one had abandoned the original vocational area and decided to try and become a primary school teacher. The three who left before completing were last heard of working respectively in a pub, a hotel and an electronics industry company.

Motivation was not easily identified. The two students who completed with distinctions demonstrated a desire to achieve. They had less to do with their fellow students and focused on the qualification constructs or processes. They were selective when it came to team activities and timely in submitting coursework. Both students had experienced someone suggesting that they would not do well in life.
Those who withdrew had complex reasons for leaving. On the face of it, it could be said that they left to earn money. Yet in each case there were other factors to note. Student A had left home to move in with her boyfriend, relationships with her parents were tense, she had let her GNVQ work slip and she had been working in a local night club until very late, sometimes to about three o’clock in the morning. Student B had had problems with the assessments, he didn’t enjoy the qualification, he had wanted more active learning activities and he had enjoyed the holiday camp work that he had started at the end of his first year. Student C had a long and difficult journey to get to college, she found the travel and her part time work very tiring, she had started to fall behind in the submission of course work, she was older than the other students (and had felt this age difference was important) and she wasn’t really comfortable in the college.

Discussion

The students in this project were faced with a difficult decision when they reached the end of compulsory education. Yet because of the circumstances that existed the apparent breadth of choice is often illusory. Students are thus asked to make decisions where their horizons for choice were closed down. As a result, and building on work undertaken by Bloomer and Hodkinson (2000), students were more likely to lack commitment when the decisions had been made as a result of selection to avoid the things that the individual didn’t want to do. That is, a negative decision was made rather than the positive in choosing the things the individual would really like to do. This, in turn, appeared to impact on motivation and at times led to withdrawal.

It is possible to identify the changes to further education that have contributed to this potentially dangerous and wasteful set of circumstances. Removing FE from a co-operative and integrated educational framework forced FE principals and school head teachers to adopt competitive stances. This meant that pressures were brought to bear on students to encourage them to make certain decisions in favour of enrolment on certain courses in certain institutions. These pressures took the form of marketing campaigns with institutions diverting money from budgets to address recruitment as a serious priority. The diversity of curriculum suffered as competition forced the provision to bunch in easy to resource curriculum areas such as Business, Health and Social Care and Leisure and Tourism. This undermined the provision of expensive Hospitality and Catering courses.

The business of education brought with it new pressures as lecturers were urged to change so as to become administrators of learning rather than teaching specialists. Accuracy in ensuring students completed learning agreements was fundamental in gaining the necessary income to assure survival and growth.

It is clear that motivation for vocational study can grow as the student progresses on a course. It is therefore important that vocational studies support this growth as a major objective. There was little evidence that students had particular clarity of vision for their futures and indeed it would be surprising given their experiences and academic attainments that this should be the case. For Tourism and Hospitality educators, the challenge is to develop a curriculum that is sufficiently challenging and inspiring to support the growth of commitment and motivation. For many students, involved in the research project, the GNVQ curriculum was process driven and constrictive thus confirming points made by Smithers and Robinson (2000).
Students who committed to the qualification were few. They succeeded by learning the process of passing the GNVQ and avoided working in groups made up of those who didn’t participate (window watchers) or those who were there primarily for the company of others (social distractors). These committed few were dismissive of the aforementioned ‘other’ type of students, stating that people shouldn’t enrol if they weren’t really sure what they wanted to do. This set of circumstances echoed the findings of Bloomer and Hodkinson (2000) whose work commented on the social and cultural nature of learning. In their study success was sometimes tied to social life, friendships and membership of particular groups and the authors felt that this particular point is deemed to be of major significance to young learners. The situatedness of learning, as identified by Lave and Wenger (1991), cannot be ignored as a major factor in considering how and why learning occurs.

There are interesting patterns reflected in these cases of students who had concerns about their ability with numbers. The concerns inhibited these students because their negative preconception is a part of their circumstantial curriculum. That is, the range of individual circumstances that the student possesses and makes reference to when rationalising on decisions or options for choice.

**Summary**

The vocational divide is not only alive and thriving but it is being encouraged by government policies. Vocationalism should be strongly supported both in schools and colleges by the provision of a curriculum that is designed to be inspirational. The provision should be integrated to allow for progression without the inherently damaging presence of educational competition. The individual circumstances of students are complex and the provision should be sufficiently sensitive to the changing needs of individuals in terms of providing a social place to learn and a technical centre for the development of skills. AVCEs are still relatively new and it is yet to be seen whether the new qualification is an improvement on the old.

**References**


Lave and Wenger (1991) *Situated learning: legitimate peripheral participation* Cambridge University Press


Globalisation of education and culture:
a study of a fledgling supplier

Kevin Nield¹, Sheffield Hallam University

Abstract
The aim of this paper is to consider the move of the School of Sport and Leisure Management into global markets. In this case the Hong Kong market. While on the surface the courses worked remarkably well it was soon apparent that cultural differences in aspects of teaching, learning and assessment needed to be investigated. The starting point of this investigation was firstly to consider generic national cultural differences of Chinese learners and then to ask if these differences impact upon the teaching, learning and assessment practices.

The paper discovered that within the relevant literature there were potentially seven differences that could impact upon the education of Chinese students. To further explore the possible impact of these differences research was undertaken. The research took the form of interviews with ex-students, expatriate British lecturers teaching in Hong Kong and the School's staff.

The paper concludes that there are educational differences that must be addressed if Chinese students are to reach their full potential. These differences should be made known to staff and strategies devised that enable both students and staff change these differences into strengths. What the distance learning courses delivered in Hong Kong need to undergo is a two-way development that allows adjustments to be made on both sides.

Key Words: Distance Learning; National Culture: Chinese Culture.

¹ Kevin Nield, MSc, BA, PGCE, MHCIMA, MILT, Deputy Head of Division, School of Sport and Leisure Management, Sheffield Hallam University, City Campus, Pond Street, Sheffield S1 1WB, UK
Tel:+44 114 225 5555; Fax: +44 114 225 3343; E-mail: k.nield@shu.ac.uk
INTRODUCTION

In this paper it is my intention to investigate the influence of Chinese national culture upon teaching, learning and assessment in the context of distance learning courses offered in Hong Kong by the School of Sport and Leisure Management.

From the beginning of our fledgling move in to the Hong Kong market we made no recognition of national culture in terms of changes to teaching materials or learning, teaching and assessment. No member of staff has had any culture awareness training. National culture of other potential markets and students has not been considered within course and unit planning or teaching, learning and assessment. We entered the market as a result of agent “push”. This approach is contrary to the limited literature regarding international distance learning provision. In this literature the general advice is that the cultural implications of materials, teacher-student interaction and language should be a consideration. It is also contrary to business advice and advice now stemming from educational research that western systems cannot be simply transferred to other cultures and that one “McDonaldised” product cannot be offered in any market place (Maxwell et al, 2000; McPhee and Nohn, 2000; Thompson and Gui, 2000b; Ritzer, 1996).

Although the courses have met with some success there is some evidence that these students may be underperforming in that they produce lower results than might be expected and there is a considerable non-completion rate. In this paper I will ask if this approach to distance learning education in Hong Kong is appropriate or would we have more success with the course if we accounted for cultural differences. Within this context I aim to examine cultural differences and explore how these differences may impact upon teaching, learning and assessment. In doing this I will consider the issues as they arise.

AIMS OF THE PAPER

1. Describe how the School of Sport and Leisure Management teaches and assesses the distance learning courses.
2. Examine national culture and Chinese culture.
3. Consider the impact of Chinese culture on teaching, learning and assessment. Comparing this with what we do at present on this course and considering how Chinese culture may influence the future development of the course.
4. Make recommendations as to the way forward

To enable me to achieve these objectives the main source of information used was the literature. To add to and enrich the literature I undertook some small-scale research in the form of structured e-mail interviews. The research was carried out with three Hong Kong students who have completed their distance learning courses and two Hong Kong educators as a pilot study as part of my doctoral course in education.

The purpose of the research with the students was to establish their opinions. Specifically they were asked if the learning materials, and the teaching, learning and assessment were suitable for the Hong Kong Chinese culture. The two educators are expatriates who have taught in Hong Kong and the UK. They were asked if they had to change teaching methods and materials to fit Hong Kong Chinese students.
In addition to the responses of the students and the Hong Kong educators all of the staff of the School of Sport and Leisure Management who have taught the Hong Kong course were given a short e-mail questionnaire. This was necessary to ascertain exactly how the students had been taught and assessed and to discover if the staff had encountered any problems with their teaching, learning and assessment strategies.

For the purposes of the paper and to prevent any confusion of terms that may arise the three student interviewees will be referred to as Student A, Student B and Student C. The educators will be referred to as Professor A and Professor B. Tutors in the School of Sport and Leisure Management will be referred to collectively.

DISTANCE LEARNING COURSES OFFERED BY THE SCHOOL OF SPORT AND LEISURE MANAGEMENT IN HONG KONG

The distance learning courses offered by the School of Sport and Leisure Management in Hong Kong are a Master of Science in Hospitality Management and a Master of Science in International Hospitality Management. All units are written to the same template and are assembled in the form of a study pack. All the learning materials are written and devised by the School’s teaching staff. In addition to the study packs the students are provided with all textbooks, journal articles and other source materials.

In addition to the study packs learning also takes place at annual study schools that are held in Hong Kong. The purpose of the study schools is to introduce students to studying at master’s level, the individual units and to the assessment package for the taught units. The study schools take place in the evenings and at weekends. Each member of staff will have a "slot" for their subject of approximately six hours. Aside from the study schools contact between students and tutors takes place by e-mail, fax and telephone on a need basis.

As stated in the introduction no alterations to the courses in terms of teaching, learning and assessment or learning materials are made for the Chinese students. While this may appear to be inappropriate this omission is by no means solely confined to Sheffield Hallam University. Craft et al (1998) report that Western courses offered in Hong Kong are almost always offered without modification.

NATIONAL CULTURE

Before altering materials and methods to fit national culture it is necessary to ask if national cultures differ. To answer this question it is appropriate to consider the theoretical models of national culture and relate them where possible to Chinese and Western cultures. If national cultures are similar then distance learning courses offered in Hong Kong should encounter fewer problems than if national cultures are different.

Several models of national culture exist. For the purposes of this paper I will concentrate on Hofstede's model as, in my opinion, it has wider applications, is more widely cited and appears to be more accepted than other models.

---

2 In a rough and ready search in Emerald, Hofstede was cited in abstract key words 17 times.
Hofstede

Hofstede (1980) administered over 116,000 questionnaires in twenty different languages to IBM employees in 40 countries. Each questionnaire contained 150 questions based on the individual’s values and beliefs about motivation, hierarchy and leadership. Upon analysis of the responses of the individuals from different countries Hofstede identified four variables (later extended to five) with which he was able to classify all of the countries within the study into national categories.

The four variables identified by Hofstede are:

1. **Power Distance** - the extent to which society will accept differences between the lowest and the highest
2. **Individualism** - the extent to which society is concerned about the individual as opposed to the group. The extent to which individuals "stand on their own two feet"
3. **Masculinity/Femininity** - the extent to which society defines roles in terms of gender e.g. men are lorry drivers, engineers etc. and women stay at home and bring up the children.
4. **Uncertainty Avoidance** - this measures the extent to which people feel threatened by uncertain situations i.e. the extent to which they need to establish formal rules, accept absolute truths etc

When these four dimensions were analysed, Hofstede classified countries into one of eight national cultural types depending on the degree of the four dimensions. While not wishing to go into all of the nationality types. Two are important to this study. The first is "Less Developed Asian". This classification includes Hong Kong. These countries are similar as they have low uncertainty avoidance and individualism, medium masculinity and high power distance. The second is "Anglo" that includes the United Kingdom. These countries were found to have low to medium uncertainty avoidance, high individualism and masculinity and low power distance.

The important point to note from this is that the United Kingdom and Hong Kong differ in each of the dimensions.

One of the major criticisms of Hofstede’s original work was that the questionnaires and the cultural dimensions that resulted from it were derived from the western cultural tradition. As a result of this it could be that Hofstede's work was culturally biased and that some important results were missed. A group of academics specialising in Chinese culture put together what they called the Chinese Value Survey. This work concluded that there was a direct correlation with three of Hofstede's dimensions but that another oriental dimension - Confucian Work Dynamism had been missed, indicating cultural bias in Hofstede's early work (The Chinese Culture Connection, 1987). This dimension included concepts that although stemming from Confucius would be understood by Westerners but would not be given any real importance by them, for example, thrift, perseverance and persistence.

Hofstede worked with the main author of the Chinese value survey, Michael Bond to add this fifth dimension - Confucian Dynamism to his model (Hofstede and Bond, 1988). This dimension applies mainly to China, Korea, Hong Kong, Singapore and Japan. In practical terms it is long term versus short-term orientation to life (Hofstede, 1991; Rodrigues, 1999).
Summary

Hofstede’s model of national culture indicates that national cultures differ. More importantly there is significant evidence to suggest that British and Chinese cultures differ in almost every dimension that researchers have put forward in identifying national cultures. Notwithstanding the criticisms and the defences of Hofstede, it may be that the importance of Hofstede is not the original work but the fact that he has opened our eyes to differences in national culture and has made us aware of them. Morden (1995) although writing about management practice states that the crucial aspect of the work of Hofstede and others is that cultural adaptation and interpretation are prerequisites to understanding markets. If this is correct then we should understand Chinese national culture and its implications for education if we are to enter these distance learning markets. The paper will now move on to examine Chinese culture.

Chinese Culture

In the literature, Chinese culture is used as a term to encompass all cultural values held by Chinese people regardless of where they live, that is, people from Hong Kong, Taiwan, Singapore and Mainland China all share the same culture (Fan, 2000). On the face of it, this is a major generalisation. However, Fan acknowledges that there are great social, political and economic differences between the Chinese nations but also states that there are core values that are unique and consistent that have been shaped by 4000 years of history. It is these core values that determine Chinese national culture. This view is fairly consistent throughout the literature; little or no attempt is made to differentiate the different Chinese nationalities.

At the heart of these core values is Confucianism. Confucianism is a behavioural and moral doctrine that is based on the teachings of Confucius. Confucianism spells out rules for each level of the human interaction. It is argued that these rules of behaviour are instilled into Chinese children even though there may be no direct reference to a Confucian texts (Crooks and Thomas, 1998). These rules, which will not be dealt with here, impact upon education and the learning, teaching and assessment preferences of Chinese students. From this It would be reasonable to suggest that a “purely” western course such as that offered by the School of Sport and Leisure Management that is transplanted in to a Chinese setting without modification may be troubled with cultural problems.

Possible Differences in Chinese Educational Preferences

In this section the paper will deal with possible cultural differences in preferred forms of teaching, learning, assessment and learning materials and will ask how important these differences are. In each case it will ask if these differences are corroborated within the literature and also by the research undertaken for this paper.

The following are the main differences that I have identified.

1. Curriculum Content

Different academic disciplines in the Chinese culture have been categorised as “hard” or “soft” (Corder, 1990). Hard subjects emphasise rigorous scientific thinking; soft subjects
are intuitive and subjective. Asian management education tends to concentrate on hard subjects, for example Finance and Operational Management. Soft subjects such as Human Resource Management and Organisational Behaviour are regarded as much less relevant. They are common sense and down market from “useful” subjects such as Accounting and Marketing. Chow (1995) corroborates this, she states that Chinese students prefer practical subjects. They do not like lectures that are overly theoretical or theory or abstract models.

The outcome of this may be that some aspects of Western curriculum content do not fit Chinese needs and culture. An example of the difficulty that subjects such as organisational behaviour may cause would be in the area of assertiveness training. Assertiveness is thought contrary to the Chinese culture and would conflict with concepts of face and power distance. Chinese learners may also reject western management ideas on topics such as leadership attributes. The Chinese would be expected to respect legitimate authority based on age and position and may discount concepts regarding attributes of leaders (Berrell et al, 2001).

There is no view within the literature that is contrary to this. However if this view is correct our curriculum content may have given problems for our delivery in the areas of Human Resource Management and Quality Management. From the small scale research that was carried out with the students there appears to have been no sub division by them into hard and soft subjects. Similarly the tutors of the so-called “soft” subjects did not experience any student resistance. All of the students were successful and none of the students interviewed held any unfavourable view. Similarly the “hard” subject Finance appears to cause the same problems for Hong Kong students as it does for their Western counterparts.

2. Teaching and Learning Strategies

Teaching and learning strategies used should be congruent with students’ cultural backgrounds. The predominant belief in the literature is that Chinese students prefer passive teaching methods such as lectures, demonstrations, handouts, displays, films and videos. Experiential exercises, case studies, role play and simulations belong to participative teaching methods and are said to be least preferred (Chow, 1995). Problem solving, explorative teaching methods employed in the west would not fit with the Confucian derived preference for rote learning (Thompson and Gui, 2000a). Maxwell et al (2000) when researching the previous learning experiences of Chinese students found that this experience had been that of mainly passive and content based teaching.

Most of the research undertaken for this paper supports the general view of preferred teaching styles. Classroom contact with Chinese distance learning students takes place at the study schools. The School’s staff reported that they had mostly used lectures and seminars at the study schools and that the Chinese students preferred this teaching method. Chinese students (in the opinion of the staff) preferred “didactic teaching” and “listening and doing - not talking”. Only one member of staff had attempted role-playing and team exercises. He reported that there had been problems in this area and had been told by the students that they did not like this method. In the original student questionnaire no student expressed any preference, however, in follow up questions asked to the students both of the students that replied had a preference for lectures and both disliked role-play. Similarly in follow up questions Student A said that he would engage in debate but did not like disagreement.

3 This view of rote learning is questioned later in this paper.
While the most of the literature supports the conventional view of Chinese preferred learning it is contradictory in parts. For example, Chow (1995) tells us not to use case studies and then proceeds to tell us that lectures backed by case studies may be preferred by Chinese students. Berrell et al (2001) state that case studies may be adapted for use in high context cultures such as Hong Kong. While it is generally agreed that more active learning may be difficult to employ there are papers that explain how these it may be used. Crookes and Thomas (1998) state how problem-solving techniques may be adapted for use with Chinese students. Similarly, group work can work well with Chinese students but may need to be structured differently than it would be with British students. Normally Chinese students would work in groups of two and would come to the front of the class to explain what they have learnt. Other students and teachers would listen and pay attention. Tang (1996) advises that Chinese students will work collaboratively but may prefer to do it informally outside of class as part of their learning process.

The important learning point from this is to recognise that teaching methods thought to be disliked or unusable with Chinese students should be made known to those staff who teach Chinese students. Staff development should take place to show how supposedly unpopular teaching methods may be used effectively and efficiently in order that they may be effectively used to fit Chinese expectations.

3. Classroom Discussion and Learning

It is often said that Chinese students are unwilling to participate in open discussion. They prefer to adopt a passive role in the classroom and to be quiet, listen and learn (Chow, 1995).

The general view is that open-ended questions are met with silence. Volunteering to answer questions is rare although occasionally open discussion may attract one or two outspoken individuals. The reason put forward to explain this is that discussion is against Confucian principles of modest behaviour. Open discussion is against the ethic of self-effacement. Expression of criticism is frowned upon and is severely limited by the social norm of the fear of loss of face (Redding, 1980). The perception of teaching staff at Glasgow Caledonian University was that the Chinese students were unlikely to say anything in class and would queue up at the end of teaching sessions to ask questions (Maxwell et al, 2000). Unlike their Western counterparts Chinese students are inhibited in expressing feelings and opinions. They tend not to reveal their feelings and being outspoken is not encouraged. Another reason that is proposed for this behaviour is that due to the collectivist nature of the Chinese culture a student who speaks or asks questions is doing this for her or his peers. Any loss of face resulting from a show of ignorance would be a loss of face not only for the students but also for the whole group (Kontoulis and Williams, 2000).

While this behaviour has been observed it may be that the reason for it is not that Chinese students do not have questions or are afraid to ask it is that they believe that it is rude to ask questions that of based on ignorance (Watkins, 2000). Whereas their Western counterparts ask questions to fill in gaps in their learning Chinese students wait for all of the knowledge to be imparted and then ask questions. Hence the queues at the end of classes. The majority of the Hallam staff at the study schools noted this type of behaviour. Volet and Renshaw (1996) observed in their research that Chinese students did participate in tutorials as much as their (in this case) Australian counterparts but that they were not the most or least voluble.
Both Professor A and Professor B said that they had changed their teaching styles to take account of this behaviour. While this behaviour may be explained it does represent a difference in both teaching and learning styles that may need to be taken account of at the study schools.

4. The Role of the Teacher/Lecturer

The lecturer or teacher is regarded as all knowing and is the sole provider of knowledge. Chinese learners have been brought up to respect knowledge and wisdom, they have been socialised to respect teachers and those who provide them with knowledge (Chan, 1999). Due to high power distance the teacher is held in great respect, students would regard it as disrespectful to ask questions in class. At no time the belief is that the student would challenge the views of a lecturer. These authority relationships between students and lecturers reflect Confucianism and the high power distance in Chinese culture (Chan, 1999: Dimmock and Walker, 1998).

The general view is that in Asia the teacher's role is to teach, teachers are expected to set rules. Students rely heavily on the teacher and seek specific instructions. The teacher must lay down clear directions that the student must follow. In Hong Kong the teaching style is the didactic and teacher-centred. Lectures, tutorials and seminars are far more popular than any other teaching style.

Within the research very little was made of this neither Professor A or Professor B mentioned any differences in the teacher-student relationship. Professor A did say that the students deferred to him but made no further point. Students A, B and C all found the School’s lecturers to be helpful and knowledgeable, none had any suggestions to make regarding any improvements. In follow up questions Student B said that the teacher should provide all of the information and Student A did not wish to engage in debate with teachers. Nothing further with regard to students–teacher relationships was brought up by any of Hallam’s staff.

5. Assignments

The conventional view in the literature is that Chinese students prefer examinations and questions that require a definite answer. Assignments that are structured and with a prescribed answer are preferred. As was stated earlier hard subjects are preferred to the soft. Subjects such as finance (often disliked by British students) that require a precise answer fit the preference for a structured solution. Similarly there is said to be a preference for examinations that possibly stems from the old Chinese public examination system (Maxwell et al, 2000).

When questioned about their assessment preferences none of the students opted for examinations. All three said that the Hallam assessment package suited them and no suggestions for changes were made. Student C said that he found the assessments to be “helpful”. It was only in the follow up questions that Student B expressed a preference for examinations because they provided a “check on his comprehension”.

Both Professors A and B said that Chinese students preferred questions that had a definite answer. That Chinese students need help to “appreciate an assessment that does not have a yes/no or right/wrong answer”. This conventional view is also backed up by personal observation.
Notwithstanding this again there is a contradiction. Some literature suggests that Chinese students do achieve higher level cognitive learning outcomes and outperform their Western counterparts (Biggs, 1996). Unfortunately nothing was said as to how these outcomes are assessed although it was said that Chinese classrooms are different places when not seen through Western eyes (Biggs, 1996; Marton et al, 1996: Tang, 1996).

The learning point here is that Chinese students may be unused to assessments that do not have a right or wrong answer but that they can be taught to develop an argument. This has important implications for the study schools. Part of the study school may be devoted to teaching this skill.

6. The Chinese as Rote Learners

Chinese people are generally regarded to be rote learners, they learn by rote and memory (Chow, 1995). Typically In the Western literature Chinese learners are regarded as “tape recorders” (Biggs, 1996, page 47). This rote learning is seen by some as a result of the desire to do well and to excel academically leaves the students with very little choice than to learn by rote (Yee, 1989). As rote learning is known to lead to poor learning outcomes and learning at a superficial level it should not produce the higher level outcomes that university courses are looking for.

If this perception is correct then Chinese students should perform badly. However, the evidence is to the contrary it is apparent that Chinese students outperform their Western counterparts. It is also true that when responding to questionnaires about their educational preferences Chinese students do not appear to be rote learners (Watkins, 2000).

Research indicates that it is a mistake to assume that Chinese students are rote learning. Memorising and understanding are not separate parts but are one connected and interlocking procedure. Chinese students rely on memorisation as a part of the learning process (Kontoulis and Williams, 2000: Watkins, 2000). The Chinese system of learning is to become familiar with the text, to understand it, to reflect upon it and then to question it (On, 1996). This argues that there is a cross cultural difference in learning in that Western students saw understanding as a sudden insight while Chinese students saw understanding as a long process that requires considerable mental effort. The effort ability dichotomy referred to earlier appears logical when viewed in this way (Watkins, 2000).

This view of Chinese students as rote learners was not confirmed by anyone within the research. To some extent this is not be surprising, as the course contains no examinations where question responses may indicate rote learning.

7. Course Materials should be adapted to Include Hong Kong examples

Although this is not a strictly a point arising from cultural differences it is a point of investigation in the original aims. The literature, both generic business and educational states that course materials and products should be made country specific (McPhee and Nohn, 2000; Thompson and Gui, 2000a; Maxwell et al, 2000). While this may be the case the students thought it to be unimportant. As they saw it they are hospitality professionals in an international industry. As Student B said Hong Kong is international therefore he would expect the materials to be international. Possibly what the students want is the international dimension that is reflected in the learning materials.
CONCLUSIONS

It is evident that Chinese national culture is different to that of other countries. The root of these differences lies in Confucianism. This difference in national culture is reflected in education. Chinese learners are different in that they think differently and as a result have different preferences in terms of learning, teaching and assessment. Some of these we must take account of in our teaching, learning and assessment strategies.

From the literature and the research there is evidence to suggest that concept of Chinese as rote and superficial learners is stereotypical. Although some literature suggests that “soft” subjects are disliked there is no evidence in this study to support this view. Similarly it would appear that contrary to the conventional wisdom examples given in the learning materials in our courses need not to be tailored to the Hong Kong context.

The differences that we should recognise and that will impact upon future course design are as follows. First, there is evidence from the literature and the research that supports the general view that students prefer passive learning. If other active forms of learning are used then they may need adapting to meet Chinese expectations. Second, the same sources of evidence suggest that Chinese students dislike classroom discussion, they prefer to understand first and ask questions later. Next, it would appear that assignments with prescriptive answers are initially preferred although there is evidence that indicates that Chinese learners may be taught to answer questions that do not require a definite answer. Lastly, although it has not lead to any known problems with past students, the role of the lecturer appears to be different from that expected in the West.

The Way Forward

From this study it would appear that teaching, learning, assessment and learning materials offered as part of the distance learning courses are not fully suited to the needs of Chinese learners. The areas that are not suited to them have been made known to teachers as part of their induction to the overseas programme. Lecturers are now helped to take account of these differences to prevent mistakes being made in study schools and to inform what teaching at study schools.

It should now be the case that before lecturers are asked to teach Chinese students they should be made aware of these differences and staff development time should be spent exploring how these differences on both sides may be overcome.

Induction for Chinese students has been changed from being totally subject based to assessment and skills based. As part of the induction process students are taught what is expected in terms of essays and other assignments. Further students are invited to submit drafts of their assignments for comment and to help them improve their analytical skills.

This paper is part of a Doctorate in Education funded by the School of Sport and Leisure Management to look specifically at Chinese learners. What has been presented here are the early findings. As the study now moves in to the research section further research is being undertaken to attempt to fully understand the real educational needs of “our” Chinese learners. I use the word our as what we may be dealing with is a different subset of learners who may be differentiated by occupation, finance and education.

What the courses are to undergo is a two-way development that allows adjustments to be made on both sides. Effectively it should enable the two sides to meet in the middle.
References


Globalisation and culture: new training requirements for tourism

Andrea Macchiavelli, University of Bergamo

Abstract

Globalisation implies a great enlargement of tourist markets. Thanks to its cultural resources, Europe, and Italy especially, is already experiencing a considerable process of substitution of the traditional tourist flows with those from new areas of origin. The problem takes place in the opposite direction, too. European tour operators tend to supply their customers with new exotic destinations, including newly built resorts. The identities of the hosting populations are threatened.

This paper focuses on the impact of the market enlargement on the training for tourism and comprises three principal aspects

1. Until today training for tourism has been mainly steered to the business area. This surely is one of the most important areas of training, but probably today it is necessary to pay more attention to other dimensions: anthropology, sociology, psychology, as well as the knowledge of heritage which should enter training for tourism in all their aspects. Training for tourism should be interdisciplinary.

2. Managers of tourist enterprises and resorts must take into consideration the cultural differences of their guests. Training for tourism should be open to the knowledge of different and distant cultures and of their behaviour, in order to orient the tourism supply towards more qualified and personalised services.

3. The increasingly intense relations between international tourist institutions - and between these and international companies (such as tour operators and hotel chains, etc.) - require the creation of professional skills, which are better geared to work on the cultural level in an international dimension.

Keywords: inter-cultural dialogue, multi-discipline training, cultural mediation

1 Andrea Macchiavelli, University of Bergamo, P.za Vecchia 8, 24100 Bergamo - Italy
tel +39 035 277237
corporate address: Via Mantova 21- 20135 Milano (I)
Tel/fax +39 02 5456131
E-mail: consmac@iol.it
1. TOURISM AND GLOBALISATION: NEW DEMAND AND DESTINATION AREAS

Tourism and economic development

As is known, tourism is at once cause and effect of globalisation processes. The economic development that in recent decades has involved new areas of the planet has created opportunities for the mobility of persons, in addition to goods. This has been enhanced by new context conditions, such as:

- the development of transport and communication systems;
- the diffusion of technologies, which, in as much as they are strongly pervasive, have rapidly spread in new areas of the world;
- the drop in air transport fees, as a consequence of air transport deregulation;
- the cultural growth of populations that has generated new interests in knowledge;
- a greater knowledge of languages; in the past, the scarce knowledge of foreign languages (in Italy the problem is still largely felt) has strongly limited cross-frontier tourism.

These processes of the extension of tourist markets, consequent to economic development, are especially featured in the emerging areas of the world. In the first stage, these areas feature especially as destination areas, and later also as areas of origin. In fact, development tends to generate bi-directional flows, as a consequence of the economic exchange that is created.

Europe and the new originating areas

During the last two decades, Western Europe has felt the opening up of the tourist markets, mainly related to two great areas: the Asia-Pacific, especially as a consequence of new countries in addition to Japan, and Eastern Europe.

In both cases these are areas that bear a culture that is very different from that of Western Europe; the differences are more obvious with the Asian area, but it is also visible in the case of Eastern Europe, which is still scarcely known to western populations, owing to the longstanding division between the two Europes.

The phenomenon is bound to make its effects felt far more in the coming years: forecasts for 2020 by the World Tourism Organization state that China and Japan will be among the first four countries generating tourism, and the Russian Federation will be among the first ten.

Already now, in Italy, the presence of tourist flows arriving from the new areas is being clearly felt. An analysis conducted a few years ago (Macchiavelli, 1999) shows how the south-east Asian component accounted for roughly 9% of the country’s international arrivals, and that the component from Eastern European countries amounted to nearly 5%. However, it is not the overall figures that are important, but the distribution of these flows on the territory which generates the relevant effects.
Tourists coming from the new regions, in fact, tend to concentrate in the great tourist destinations (Rome, Florence, Venice and Milan) which are the biggest attractions for those who still do not know Italy well; owing to these new flows to these big cities, high congestion phenomena are generated (queues, pollution, vehicle traffic, increase in prices) which, in the more intense periods, tend to re-route more traditional tourists, from western European countries, and from Italy itself, towards new less renowned and less congested destinations, in search of new resorts.

Some data can explain this trend: about 80% of tourists from South-East Asia choose destinations in four Italian regions: Veneto, Toscana, Lazio and Lombardia, which also include the cities of great art and business. Tourists from Eastern Europe mainly aim for the Adriatic coasts, for mainly seaside tourism, but from which they can also reach the great cities of art, generally on day-trips. Instead, tourists from central and western Europe tend to distribute more uniformly over the territory: less than 50% concentrate in the regions previously mentioned, and the percentage of those who have different Italian regions as destinations is much higher.

Substantially, what is being outlined is a new market segmentation related to:
• area of origin
• culture of origin
• method of the visit
• time available
• tendency of consumption
• service expectations

All this gives rise to the issue of new conditions for the encounter between the hosting populations and the tourists, and new forms of liaison between demand and supply. Tourists originating from the new regions of the world generally have little time, widely uses intermediaries (Tour Operators), and know little of the Italian culture, or else, what they do know is stereotypical; in terms of the East-Asian tourists, they possess high expense capabilities and are very sensitive to the quality of services, being accustomed to international standards.

In contrast, the more traditional European tourists move more independently, use above all their own means, have more time, know the typical Italian offer better and are more ready to encounter and deepen their knowledge. They are often oriented towards less well-known destinations to discover novelties and the local cultures.

The human resources that operate in the system of the tourist offer are summoned to respond, sometimes with different methods, to the new requirements which the tourists express relative to their tourist expectations.

**New destinations for Western tourists**

The relationship with new world areas also involves another aspect. Over the last few years, investments by large western corporations in countries with low levels of development have increased, and these represent exotic destinations for westerners (the Caribbean, South America and Africa). The great hotel chains and tour operators have invested considerably in the construction of resorts, hotels, tourist villages; estate development has been intense and the development of cruise tourism has further widened interest in these areas.
All this implies an increasing interaction between western operators and the institutions and governments of those countries; environmental impact issues are beginning to be felt; the involvement of local workers poses juridical and economic relationships; it is increasingly understood that tourism considerably affects the local culture, and that the so-called “sustainability” of tourism implies respect of these cultures.

Also in this case the implications for the human resources that operate within the great corporations of tourism are obvious: what is needed is skilful people who are able to communicate with different institutions and cultures, to comprehend the differences between juridical and economic systems, and to manage relationships characterised by a high level of cultural difference.

2. TRADITIONAL TRAINING IN TOURISM: THE MANAGEMENT PRIMATE

In countries with a long-standing tourist tradition (and Italy is among them), the tourist offer developed like a spontaneous phenomenon, as a response to a demand that emerged with increasing consistency.

This explains why the first generation of tourist operators was characterised by the “self-made man” type, that is, entrepreneurs who had trained independently, who, creatively and with interpreting skills, developed their response to a demand that was for the first time experiencing new requirements in travelling, accommodation, and use of leisure time. In Italy, the “self-made man” primate still persists, and only for a few years, especially owing to the generation turnover, has the need for training in the tourist sector been felt.

It is also understandable that during this first stage training was above all oriented to forming economic-management competence: it was a matter of providing organisation skills and management abilities for companies that had, in the meantime, become larger and more complex and therefore required better methods and tools to ensure their competitiveness.

Management training has until now been the core of tourist training and will remain so always, considering that tourism is above all the expression of an economic phenomenon, and requires economic behaviours and tools to ensure the effective meeting between demand for consumption and the offer of goods and services.

This is not the case only for Italy; in Great Britain, where training for tourism has a much older history than the Italian one, and where many universities have long been offering courses in the field of tourism, the orientation to Tourism Management remains prevalent in the offer of training proposals, although they respond to a greater topical spread (Tourism, Hospitality, Leisure, Heritage).

As the tourist phenomena become more complex, prompting interaction with other fields of human knowledge and behaviour, the belief that tourist studies should be set at the centre of a variety of disciplinary fields is consolidating, although they are not in themselves a discipline. The Jafari (1981) model of 1981 identifies a spread through 16 disciplines; more recently Tribe (1997) proposed a method broken down into disciplines and sub-disciplines in which tourism business studies share the training with non-business studies. It is Tribe who stresses the lack of unity in tourist studies, which leads to abandoning the hypothesis of considering tourist studies as a discipline.
The complexity of the tourist phenomena as previously pointed out further highlights the need to intensify the liaison between the various knowledge areas that interact with tourism. More especially, nowadays more than in the past, we feel the way in which tourism is expressed through a cultural meeting: a “culture” is not just a way of reasoning, but also of acting, moving, feeding, sleeping, and relating to a work of art. “Tourists tend to move on in their search for further experience. In developed economies, individuals are increasingly replacing the amassing of economic capital by the amassing of goods, experiences, and insights. Cultural tourism is a principal vehicle in this new acquisitiveness” (Prentice, 2001).

The globalisation of tourism has also shown this dimension more clearly, because it has allowed different and distant cultures to be set close to one another; also when the origins of the tourists are in nearby territories, there is an “encounter” between cultural identities that are, to some degree, different.

Although it may be true that globalisation processes lead to a tendency towards homologous services and behaviours, this affects some components of tourism; for others, on the contrary, tourism tends to give value to diversity and peculiarity (Weiermair, 2000).

In this context, the encounter that the tourist phenomenon produces is effective if the cultures of the two parties (the host and the guest) are given the opportunity to know one another, to understand each other, also interacting through the goods and services they exchange.

In today’s world physical distances are increasingly small, but cultural distances are still great and tourism can contribute to closing them.

Firstly, through training, tourism must provide students with a wide range of basic knowledge and methods that allow for operation in complex systems that are rapidly changing. The governance of globalisation processes requires a deep knowledge of the phenomena that determine them. For this reason, those that operate in tourism require a cultural formation and not just training geared to the acquisition of techniques; training that must be the result of a combination of knowledge, competence and reference values. Hence the need to surpass the tourist phenomena as an exclusive expression of economic-management issues.

3. COMPLEXITY AT THE CENTRE OF TOURISM TRAINING

Tourists visiting a country or destination relate to a complex system made up of different goods and services (reception, catering, complementary services, environmental and cultural heritage, infrastructures, transport vectors, etc.). The success of a destination depends on its ability to present itself through an integrated offer system.

Hence the tourist system is configured as a network, the nodes of which (the components of the supply) are linked, made available and enhanced by the competence, the experiences and the organisation skills of the tourism operators. They affect the ability to turn a number of goods and services into an integrated supply system (Manente & Cerato et al., 2000).

Considering the front facing inside, those operating in tourist services require liaison skills and problem-solving methods aimed at a growth in the consistency between stakeholders, and to pursue shared development objectives. On the front of relationships with clients, the need is felt for the cultural mediation and interpreting skills of those who bear a different culture.
New professional opportunities in tourism arise especially in these new spaces, in countries with high tourist intensity, and not in the traditional activities that, because they need to recover productivity (Keller, 1997; Centro Studi TCI, 2000), tend to cut down the use of workers. This was well highlighted by a study on new professions in tourism in Venice (Furlan & Scaramuzzi, 1999) in which new professional figures are identified as being addressed to the tourist market, although with roots in different activities. Some examples: passenger attendant, welcomers, shopping tour promoter, heritage promoter, housemaster, ecological guide, franchisor, tourism news spreader, city tour organisers, experts in theme events and experiences.

All these professions are oriented on one hand to enhancing the market opportunities on offer by making the relationships among actors more fluid and coordinated, and on the other hand to reduce tourist “idle time”.

An integrated supply system, for the operators committed to organising and qualifying it, entails:

- **The quality of relationships among actors**
  This is achieved on the basis of new competences acquired, of better-outlined professional profiles, and of a breakdown of expertise;

- **The ability of interaction between functions**
  This implies a greater circulation of information, the skill to coordinate services and, above all, the sharing of common objectives: all attitudes that require the ability to partly give up individual objectives and interests in order to pursue common ones;

- **The knowledge of the addressees’ culture and inter-cultural dialogue skills**
  The offer cannot always be proposed separately from the culture of the tourist (Weiermair, 1995). The accompaniment of a Chinese tourist visiting the Italian cultural heritage, which is an expression of Christian culture and history, cannot be the same as that for a European tourist. The first, differently from the latter, is certainly foreign to that culture and therefore requires different tools and methods. The same, for instance, can be said for food: a tourist for the first time in Italy, will almost certainly want to taste spaghetti and pizza, while a tourist who knows the country is possibly willing to taste local specialities.

- **The ability to interpret tourists’ needs in different territorial contexts**
  The little time available to non-European tourists visiting a great art city involves above all effectiveness in the management of time; in contrast, slow tourism will require opportunities for the discovery, knowledge and availability of services, so as to access territorial resources.

### 4. IMPLICATIONS FOR TRAINING

These components of market evolution lead to special attention in training for tourism, which we shall attempt to summarise:
a. **Multi-discipline training**

There is no doubt that the different dimensions of tourist behaviour prompt special care for the co-presence of different disciplines in tourism training; however, we must also avoid the risk of a generic growth of subjects that are not strictly geared to training objectives. The required disciplines must therefore be identified on the basis of an accurate definition of the trainees’ curriculum, and they must above all be strongly oriented to the professional profile.

b. **Dialogue among disciplines**

Multi-discipline training implies dialogue among the disciplines (Albanese, 1996-97). This is the biggest problem because it implies an effort by trainers that does not depend on individual wills, but also on their abilities, which comes from the knowledge and understanding of various languages. Therefore, trainers in a complex context cannot just be experts in their own subjects, but be endowed with those minimum tools that will allow them to interpret, essentially, the languages of colleagues in different disciplines.

c. **Humanology and technology**

Liaison competence, an attitude to problem-solving and the requirement of an ample cultural dimension (Macchiavelli, 1997) point to the need for a strong humanistic component in tourism training. But, the complex context and the growing use of technologies insist on rather advanced technical skills. It is the mix between these two areas of knowledge that gives rise to the future professional profiles in tourism, at all levels, though with different degrees of intensity.

d. **Producing innovation**

A systematic approach to tourism issues is essential, but no longer sufficient. The world of tourism requires innovation in terms of products, production processes, and liaison systems. Training must be oriented to generating the conditions and prompts for innovation; hence, in addition to the transmission of techniques, it is necessary to transmit interpreting models that allow the introduction of innovation components in the relationship between tourists and the territory.

e. **Well-identified training courses**

The multiple disciplines interacting with tourism and the variety of activities that affect the sector lead to the risk of generic training courses, especially based on the worry of not neglecting basic subjects. What must be avoided is training that means “everything and nothing”. Once a basic training at the lowest levels has been provided, it is appropriate to foresee well-identified training courses, based on the requirements expressed by the market and on the evolution dynamics of the demand.

f. **Training in progress**

The tourist market is one of those that features the fastest moving evolution dynamics, also induced by consumer behaviours, which are often conditioned by current trends. Training will be in continuous evolution, in its contents and methods. In parallel, there is an issue of updating those already operating in the sector, and which only recently has begun to be felt by operators.
5. TRAINING FOR “INTERNATIONAL” TOURISM

Training for tourism is still largely thought of as a function of domestic tourism. The greater part of the professional figures that leave schools and universities are, in fact, heading for the domestic market, in service companies at the various tourist destinations or in incoming agencies. Also those who operate within large tour operators prevalently originate from training courses oriented to tourist management or company management.

Because the larger tourism corporations (hotel chains, tour operators, cruise-fleet companies, real-estate tourist operators) increasingly operate at a global level, it is becoming appropriate today to start thinking in terms of training specifically oriented to an international dimension of tourism, by proposing professional figures specialised in operating in the countries in which the tourist operations are conducted.

The realisation of a tourist village in an African or South-American country, for example, entails the knowledge of geographic and climate references, of the political, economic and institutional systems, of the juridical context, and also of the social system and features of the local culture: in other words, it means knowing the country in all its aspects. Moreover, the choice of the destination area for the realisation involves the knowledge of international geo-political systems, international economics, and the role and function of international organisations. The lack or insufficient knowledge of these issues may lead, on one hand, to an unsuccessful investment and, on the other, to negative effects on the environment or on the culture of the local population.

The sensitivity of the major tour operators towards the sustainability of their investments, both in environmental and cultural terms, has no doubt grown during the past years, though much remains to be done; however, this must be supported by professional figures who feature specific competence in order to operate in complex systems that are also different from one’s original culture.

Therefore, it is a matter of introducing competence that allows for dialogue at an international level, with an ample strategic viewpoint, with the governments of the destination countries, territorial authorities, and those responsible for tourism policies. It is, above all, a matter of ensuring respect for equilibrium between the tourist realisation produced and the requirements of the local communities. In this case, once again, a primary resource will be the ability for cultural mediation.

6. CONCLUSIONS

Training for tourism is no doubt still a young activity when compared to other sectors. However, the very fast development of the tourist market and the extension of the territorial reference framework mark the need to rapidly adapt training processes to the new market requirements. Therefore, training for tourism needs to claim the same dynamics that are featured by the market evolution.

It becomes increasingly essential to relate the originating and destination markets of the tourist flows with the contents of the training, which, instead, are nowadays thought of as a function of the internal dynamics of a territory or a country. The more the globalisation process involves frequent interaction with cultures that are distant and different from one’s own, the more it becomes essential to have a cultural mediation process, which must also become concrete at the level of services management.
Complexity in the tourist framework involves *complexity in training*. We need to depart from the strict limits of one’s own discipline (*Echtner & Tazim, 1997*) so as to form a dialogue between the various disciplines that interact with the tourism phenomenon. The professional profiles that tourism requires, and the characteristics of which are only partly outlined, will arise from an intense liaison between the humanistic and the technical components.

REFERENCES


Setting the stage:
a global curriculum for tourism – a proposed curriculum

L Steynberg, North West Department of Social Services, Arts, Culture and Sport
E Slabbert, Institute for Tourism and Leisure Studies at Potchefstroom University for CHE
M Saayman, Institute for Tourism and Leisure Studies at Potchefstroom University for CHE

Abstract

Tourism as one of the fastest growing industries in the world, is facing various difficulties in terms of curriculum development. Many questions need to be answered for example how do we go about the issue of professionalisation, do we need to distinguish between various countries’ training needs, do we need a curriculum that is internationally accepted? Who will eventually set the standards? These and other questions need clarification. This paper will propose a model for an international tourism curriculum and hope to provide some answers and initiate new debates. This model tends to think global but act local. A study conducted in South Africa from an industry point of view indicated no significant skill differences between tour operators, tourist guides and travel agents. The striking thing about modern education is that everywhere in the world the same interpretive scheme underlies observed reality. Therefore a functional need exist for the development of a global tourism curriculum. International literacy is a crucial element for institutions of higher education. The best method for helping students to achieve international literacy is through internationalising the curriculum, which will include cultural and global concepts and theories of interrelationship with regard to the global tourism industry. A major driving force behind global economic growth in the tourism industry is improved access to education. A better-educated population creates a workforce that is more knowledgeable, skilled, efficient and can use technology to increase productivity. Of paramount importance to future tourism economic growth is the rejuvenation of the tourism education system, which will ensure a world-class work force that is able to perform effectively in an increasingly competitive world.

Keywords: higher education curriculum, tourism, global approach, international education

1 Potchefstroom University for CHE Private Bag X6001 Potchefstroom 2520 SOUTH AFRICA
Tel: +27 18 2991806 Fax: +27 18 2991812 E-mail: ontms@puknet.puk.ac.za
1. INTRODUCTION AND PROBLEM STATEMENT

The travel industry, and tourism in particular, has enjoyed a positive growth rate during the past three decades that puts it in the near-phenomenal category. Influential forecasters, such as Herman Kahn, have predicted that in spite of inflation, recessions, wars, and energy problems, it will become the number one industry in the world in the 21st century. This growth, coupled with impact of these global problems, provides career, employment, and educational opportunities for educators or industry operators (Geldenhuys, 2001).

The field of tourism and hospitality is one of the most rapidly changing areas in education at all levels, both in South Africa and internationally. Hall (1991:3), Van Harssel (1994:2), Nickerson (1996:2), Riegel and Dallas (1998:1) and the World Travel and Tourism Council (WTTC) report of 1999 recognize the fact that tourism has become the world’s number one industry. Because of the importance of tourism as an economic activity, Ritchie (1988) demands a more sophisticated education infrastructure and a more competent workforce. Sheldon and Gee (1997:173) supports Ritchie and claims that the success of the travel industry at any destination is largely dependent on the quality of its personnel. This opinion is reiterated by Teare and Brotherton (1990:5) and Fayos-Sola (1999) who argue that the prosperity of the tourism industry will depend largely on well-educated human resources and that this can only be achieved by quality education and training and the optimal use of resources. Unfortunately the industry as a whole has not realized that training and education are essential to produce a quality tourism product, nor have many governments around the world given tourism the credit it deserves as major earner for the economy (Cooper et al., 1996:5).

Although the formal study of tourism began as early as the 1940s, interest in tourism education commanded little attention until the 1980s (Koh, 1994). Since then, the literature on what tourism education ought to be has substantially increased (Koh & McGahill, 1993). One of the most significant problems identified in the literature study was that tourism curricula are designed by tourist educators, who guided by their individual biases, do so with little or no input from industry (Golden, 1992; Keyter, 1982; Knutson, 1989; Wolfire, 1988). If the tourism profession hopes to obtain professional recognition, curriculum diversity cannot be allowed to continue because professionalism demands standardisation. Further, like any other market offering, the 4-year tourism curriculum must be periodically reviewed so as to maintain its relevance to the needs of students and industry. One of the aspects of globalisation is a greater movement of people and businesses (Saayman, 2000). This leads to a situation where students from one country move to another to work for a specified period of time. This also contributes to students doing postgraduate studies in other parts of the world. South Africa is experiencing a growth in foreign postgraduate students. A situation like this leads to questions that academics have to be able to answer and that is do training institutions globally need to have set standards and do institutions have to follow the same tourism curriculums.

The literature study revealed a number of studies undertaken to develop tourism curricula. One such study was undertaken by Koh (1994) to develop a 4-year tourism curriculum where the views from the US industry were solicited specifically on likely tourism development in the 1990s, the types of human resources that would be most needed by the industry and the scope of knowledge/skills 4-year tourism graduates would be expected to have. The panel suggested that the curriculum should comprise 40% general education, 30% business education, 25% tourism-specific education and 5% experiential education. A
similar study, conducted in Hawaii by Sheldon and Gee (1997), which covered the entire travel industry and canvassed the opinions of both employers and employees, confirmed Koh’s findings. Cooper (1996), working under the auspices of the WTO, consulted industry, government and educational representatives worldwide to determine the key skills required by all parties, and came to the same conclusions as Koh, and Sheldon and Gee.

Many questions need to be answered for example how do we go about the issue of professionalisation, do we need to distinguish between various countries’ training needs, do we need a curriculum that is internationally excepted? Who will eventually set the standards? These and other questions need clarification. Therefore this paper will propose an international tourism curriculum, with the hope to initiate new debates and ideas. The organisation of the paper will be as follows: methodology, tourism in the global curricula arena, the core curriculum debate, recommendations and conclusion.

2. METHODOLOGY

This is a work in progress report. The literature study was based on a qualitative study, which included journal articles, books, conference papers, theses and similar studies e.g. Koh (1994) and Sheldon and Gee (1997). The internet also played a role in this study. Key words included: tourism, curriculum, global, international, education and training. From the literature study a proposed global tourism curriculum for a BA-degree was compiled. The subsequent step is to conduct a survey using the Delphi-technique whereby a panel of experts will be put together to act as a working team on this global issue. Electronic mail will be used to obtain the survey to the panel of experts in 2002. The panel will be asked to provide their opinions on certain issues represented on various scales. With this information a global curriculum will be put together.

3. TOURISM IN THE GLOBAL CURRICULA ARENA

Programs in tourism education have been proliferating in much the same way that leisure curricula did two decades ago. Most are offered as options or areas of concentration within an established umbrella discipline. Because of the diversity of the tourism industry, the host higher education institutions and departments are equally diverse. They include business, leisure and parks, home economics, social sciences, landscape architecture, planning and design, hotel administration, fish and wildlife, geography, and others. The industry is segmented into specialisation’s, such as transportation, food service, lodging, and leisure. For this reason, it may be advantageous to maintain the present diversity in education, as long as some high quality content standardisation is developed to govern presentation of basic tourism concepts. The number of tourism programs connected with parks, resource management, and leisure studies is relatively small, but growing. This growth is not without opposition, and it seems proper to investigate the question, Does tourism education have a rightful and appropriate place as a global curricula?

There is certainly little argument – in these days of budget-cutting propositions, fiscal efficiency analysis, and added fees and charges – that the skills necessary for a good commercial operation would also benefit the tourism professional. These skills have been sorely lacking in many of our general tourism curricula. There is also an apparent need within many sectors of the tourism field for professional skills and philosophy, as well as the obvious need to open more career opportunities for tourism graduates. A well-balanced
educational program should therefore strive for wholeness in its philosophy. Creating this can be the toughest task facing tourism educators during the next decade. Few, if any, university programs can teach the entire range of tourism subject matter. Specialisation to some degree is unavoidable. However, the basic philosophy and basic skills necessary for all tourism professionals can be taught either in core curricula or in required related courses in other disciplines, such as management.

The term tourism refers to the phenomena and relationships arising from the travel and stay of people away from their normal home environments for a variety of purposes. Tourism curricula have their origins in providing a vocational understanding relevant for potential employment in some or all the components of what is loosely referred to as the tourism industry. This includes activities in the private sector such as tour operators, airlines and hotel companies, as well as public and not-for-profit bodies such as tourist boards.

Most programmes have broadened from their vocational origins to embrace wider issues relating to the nature, impacts and meanings of tourism, thereby furnishing an understanding of what is now a major world phenomenon. However, most programmes still lay emphasis on career and vocational objectives.

Over the past fifteen years the number of programmes in tourism has proliferated. They have a wide range of titles. The most common are Tourism Management, Tourism, Leisure and Tourism Management and Tourism Studies but also included are other titles reflecting the focus of particular programmes such as Travel Agency Management, Sports Tourism, Rural Tourism, Sustainable Tourism. Of the programmes with management in the title many focus particularly on business management. Others are more concerned with the management of scarce resources in the community through concepts of planning and public policy.

The study of tourism overlaps with subject domains from both within, and outside the tourism industry. To some extent, this is reflected in the trend for more recently validated tourism programmes to incorporate ideas and concepts drawn from, for example, social anthropology, sociology and cultural studies.

Degrees in tourism typically involve the following:

- A consideration of the concepts and characteristics of tourism as an area of academic and applied study
- An examination of the nature and characteristics of tourists
- A study of the products, structure, operations and interactions within the tourism industry
- An analysis of tourism in the communities and environments that it affects.

While most include some considerations of all the above areas of study different programmes have different emphasis. Typical subject areas might include: accommodation for tourists, destination planning and development, geography of tourism, impacts of tourism, international tourism, operation of the tourism industry, passenger transportation, research methods, technology in travel and tourism, tourism and the environment, tourism economics, tourism marketing, tourism policy, tourism management, sustainable tourism.
4. THE CORE CURRICULUM DEBATE

One of the factors that influence the delivery of tourism education is a core curriculum. Cooper et al. (1996:179-182) argue that despite international moves to standardise tourism curricula there is still an enormous diversity in the way in which tourism studies is being taught and interpreted by individual educators and departments. Where tourism qualifications are offered as nationally recognized academic courses, as is the case with the technikons in South Africa, a core curriculum is necessary to maintain minimum standards, and is seen as an attempt to develop a consensus-based approach to teaching tourism. It also minimizes confusion amongst students as to what a tourism qualification actually involves. The core curriculum provides a more general understanding within the tourism industry as to what could be expected of graduates who emerge from tourism specific programmes with a higher level qualification. Although technikons have to follow a national core curriculum, individual technikons are allowed to deviate with up to 30% from the prescribed core curriculum and enrich as much as needed to address regional needs in South Africa. Consequently it is debatable whether a core curriculum will in fact provide a more general understanding within the tourism industry, of what could be expected from graduates in tourism.

Therefore the knowledge and skills of a typical graduate will be identified that would be expected to be developed as part of a graduate curriculum. The depth of knowledge, the proficiency of skills and the balance of specific knowledge and skills may differ with the particular curriculum. This will reflect the approach taken, the context of study and the aims and objectives of the curriculum. Each institution is free to decide on the content, nature and organisation of the degree programme and its constituent courses/models, but it is expected that curriculum designers will ensure that the following generic knowledge base underpins all programmes, together with the knowledge base given in Model 2. The intellectual skills and the key skills identified should also feature in all undergraduate programmes. The skills specific will be developed variously, depending upon the particular context in which the student is studying.

Knowledge. Students will be able to demonstrate:

- A critical understanding of the development of knowledge in their particular subject domain.
- An understanding of the need for both a multi-disciplinary and inter-disciplinary approach to study, drawing, as appropriate, from service, research and professional contexts.
- Their understanding of the subject through both academic and professional reflective practice.
- Their research and problem solving abilities by critically understanding methods of acquiring, interpreting and analysing information appropriate to their context of study.
- An understanding and critical awareness of the moral, ethical, environmental and legal issues which underpin best practice.
**Intellectual skills.** The typical graduates of programmes in Tourism will have developed a range of intellectual skills including being able to:

- Research and assess subject specific facts, theories, paradigms, principles and concepts
- Critically assess and evaluate evidence
- Critically interpret data and text
- Describe and analyse information
- Apply knowledge to the solution of familiar and unfamiliar problems
- Develop a reasoned argument and challenge assumptions
- Take responsibility for their own learning and continuing professional development

**Skills specific.** Skills will be developed in various ways largely depending upon the subject domain within which the student is studying. The range of skills will normally include some or all of the following with graduates being able to:

- Plan, design and execute practical activities using appropriate techniques and procedures
- Undertake fieldwork with due regard for safety and risk assessment
- Plan, design, execute and communicate a sustained piece of independent intellectual work using appropriate media
- Recognise and respond to moral, ethical and safety issues which directly pertain to the subject domain including relevant legislation and professional codes of conduct

**Key skills.** In addition to skills specific, all undergraduate programmes will enable students to develop the following:

- Communication and presentation skills
- Numeracy and Computer & Information Technology skills
- Interactive groups skills
- Problem solving skills
- Ability to self-appraise and reflect on practice
- Ability to plan and manage learning

**Approaches to programmes.** Where the programme title contains the word ‘Management’ then it should *inter alia* enable students to:

- Demonstrate vacationally relevant managerial skills and knowledge by exposure to professional practice
- Evaluate and apply vocationally relevant concepts associated with the operational and strategic management of financial, human and physical resources and/or understand and apply concepts associated with the allocation of resources in the community

Where the programme title contains the word ‘Science’ then it should *inter alia* enable students to:

- Demonstrate an understanding of the philosophical basis of scientific paradigms
- Demonstrate evidence of competence in the scientific methods of enquiry, interpretation of analysis of relevant data and appropriate technologies
Where the programme title contains the word ‘Studies’ then it should *inter alia* enable students to:

- Critique the contributions of a range of academic disciplines that have informed the development of the subject as a field of study
- Demonstrate an appropriate degree of progression within specialist fields
- Display an integrated knowledge of the scope and breadth of the subject domain

Therefore a model will be proposed for a global tourism curriculum (see model 1). This proposed model for a global tourism curriculum is divided into three categories: fundamental-, core-, and elective units.

The **fundamental units** are basic units that need to be included in all tourism-training programs. This is the foundation for training and can be standardized throughout different tourism curriculums. Without this the student is not prepared to proceed to the next level of training.

The **core units** refer to knowledge that is important to understand all the different facets of the tourism industry. What is important in this category is that the content of each subject can differ from destination to destination. The basics of entrepreneurship will be the same but the practical implications may differ.

The **elective units** make provision for destinations/training institutions to choose whichever subjects suit their needs best. Not all destinations have ski-resorts, so they can choose whatever speciality they have. For South Africa the focus will for example be ecotourism.

Important to note that all of these subjects will differ in terms of content and period of training. Some of the core units can be subjects running for three years and others can be for only 6 months. The subjects inbound- and outbound tourism knowledge will be presented over three years.

Model 2 indicates a possible compilation of a three-year degree with the 4th year or honours degree option. This makes provision for only tourism content.

**1st year:** The first year will include all the fundamental units. Some of the core units can be included in the first year. Inbound tourism knowledge is important in the first year (Knowledge of own attractions and facilities). Written communication skills, interpersonal relations, ethics/social responsibility, societies and cultures of the world, use of natural resources and related issues, computer literacy, arithmetical skills, government and citizenship, leisure appreciation and foreign languages.

**2nd year:** Focus on the core- and elective units. Some of the core units will continue in the 3rd year. Outbound tourism knowledge starts in the 2nd year (Knowledge of foreign attractions and facilities). Research methodology continues. Management theories, marketing theories, principles of service management, entrepreneurship and innovation, accounting principles, principles of finance and principles of economics.

**3rd year:** Continued study of the core- and elective units. Research methodology continues. Dynamics of the travel industry, tourism geography, tourism development policies, hospitality operations, principles of tourism facility planning/design, planning for special events/conventions, tourism research methodologies, statistics for tourism research and the laws for the travel industry.
4th year: Internship (Two different fields)
300 – 500 hours
Mini dissertation
A typical honours graduate in Tourism will be able to demonstrate an understanding of:

- the concepts and characteristics of tourism as an area of academic and applied study including being able to:
  - Understand and appreciate the potential contributions of disciplines that help to explain the nature and development of tourism
  - Explain and challenge theories and concepts which are used to understand tourism
  - Explain and challenge the definitions, nature and operations of tourism
  - Utilise a range of source material in investigating tourism
  - Demonstrate an awareness of the dynamic nature of tourism in modern societies
  - Understand the inter-cultural dimensions of tourism

- the products, structure of and interactions in the tourism industry including being able to:
  - Demonstrate an understanding of the structure, operation and organisation of the public, private and not-for-profit sectors and their activities
  - Evaluate the factors that influence the development of organisations operating in tourism
  - Analyse relations between consumers of tourism and the providers of tourism services

- the role of tourism in the communities and environments that it affects and in particular:
  - Have an understanding of the relationship between tourism and the communities and environments in which it takes place
  - Be able to evaluate the contribution and impacts of tourism in social, economic, environmental, political and cultural and other terms
  - Have an understanding of and be able to evaluate the approaches to managing the development of tourism through concepts of policy and planning
  - Appreciate the ethical issues associated with the operation and development of tourism

- the nature and characteristics of tourists and in particular:
  - Be able to explain the patterns and characteristics of tourism demand and the influences on such demand
  - Have an understanding of the ways in which tourists behave at destinations
  - Understand the cultural significance of tourism for the tourists and their societies

Other supporting subjects:
- Economy
- Communication
- Geography
- Psychology
- Leisure
However, involving industry to participate in curriculum design as set out above, could be a win-win strategy for all parties concerned. At institutions of higher education the tourism curriculum would be more in line with industry’s needs and expectations. Tourism students could look forward more confidently to the multitude of the challenging job opportunities that await them in a dynamic industry, while in industry, the human resource needs would be better met. Furthermore, as in any marketing offering, the 4-year tourism curriculum should periodically be reviewed to maintain its relevance to the needs of students and industry. It is thus necessary to develop the 4-year curriculum with industry rather than for industry.

This marketing approach is tourism curriculum design with industry as a partner, was also identified as an issue at the National Conference on Tourism Education in Australia in December 1990, where the nature of the relationship between industry and educators was identified as a major issue that needed attention in tourism education and training. Several other studies found that educators, influenced by their individual biases, designed tourism curricula with little or no input from the tourism industry (Golden, 1992; Keyter, 1982; Knutson, 1989). In South Africa tertiary institutions rely on advisory committees, set up by the faculty or department, to advise them on market demands and needs. The advisory committees comprise of educators and people from industry. Wollhuter (2000) however, is of the opinion that there are few tourism departments where these committees function effectively.

In a study conducted by Pollack and Ritchie (1990:568) the four year tourism curriculum varied considerably. These authors are of the opinion that tourism is in need of a comprehensive framework within which to design and deliver education and training more effectively. In a research project conducted by Pearce et al (1998:xvii–xix) the skills required by tourism students were divided into two categories: skills to be acquired during the course of the study and which would be required after graduation. Tourism students should be:

- **literate** (read efficiently and well)
- **articulate** (speak convincingly in public) and
- **numerate** (understand figures and statistics).

Hawkins (1996) and Cooper (1996), working with the World Tourism Organization, listed a further five categories of skills for tourism graduates:

- **General skills**: communication and interpersonal skills, analytical skills, computer literacy and numeracy
- **Business skills**: knowledge of economics, financial management, marketing law and human resources management.
- **Tourism knowledge**: an appreciation of distribution patterns, geography, information technology, research methods, planning and policy.
- **Practical skills**: *inter alia* practical experience and knowledge of tourism employers
- **Interdisciplinary perspective**: local, regional, international and global perspectives, including ethical, environmental and social responsibilities.

The above list of skills was compiled by 300 tourism educators around the world, with substantial input from business. This shows considerable similarities with the study done by Koh (1995), which was conducted in the United States of America.
The above-mentioned studies did not focus on particular sectors. It should therefore be noted that authors such as Pearce et al (1998:xviii) acknowledge the fact that different sectors of the tourism industry require different skills; a person working in attractions is expected to have different practical and business skills from one working in a retail travel agency, marketing, tourist guiding or tour operations. This view was confirmed by the BMI Report in which respondents from the travel sector accused traditional training institutions of offering theoretical, irrelevant courses in general tourism (BMI, 1997:119).

5. RECOMMENDATIONS

The following recommendations can be made with regard to a proposed global curriculum for tourism:

- The curriculum must be designed to expand students’ interest in global tourism issues.
- One of the objectives of the curricula must be to develop within students an active rather than a passive attitude toward the subject manner, and attempt to demonstrate that their informed actions will help to further the resolution of travel issues facing our world.
- To involve students in extracurricular investigation or expression of major issues that impact on tourism. A brief example of bringing these objectives to classroom practice would be to have each student research a common area of tourism.
- Other sectors in the tourism industry should be investigated to determine whether the overlap is sufficient for a generic basic course followed by specialization.
- New curricula should be implemented soon. Currently it can take in excess of two years to implement a new curriculum or even to just to make changes to the existing curriculum at institutions in South Africa. This is unacceptable when one considers the rapid rate of changes in the international arena.

6. CONCLUSION

Travel and tourism is one of the largest social and economic forces in our society today. It has an impact upon virtually every community to some degree. Global issues play an important role in different professions. When receiving training in the medical profession it is easy to practice in another country. The same applies with accountants and engineers. The question to be asked is Why is this not the case with tourism? Each tourism curriculum focus on local issues and forget about international issues. It is time to develop a global tourism curriculum to ensure that tourism will become a profession practised on basically the same principles worldwide. It must be agreed that there is both justification and a need for tourism education within the global arena and therefore a global tourism curricula is recommended. Inclusion of such a curricula’s precepts and skills should strengthen existing tourism programs. Preparation in aspects of tourism would provide additional career opportunities in the global market for tourism graduates and a vast new area for research. A global tourism curriculum can provide new resources for resource-starved universities. Those tertiary institutions willing and able to develop quality programs in this emerging field will surely benefit. The institutions that not only develop a tourism concentration, but also incorporate a more broadly-based philosophy encompassing all tourism – along with a broader skill base – will surely reap benefits far beyond those immediately visible. Yet
tourism educators must create an acceptable, internationally applicable, definitive list of items or subjects to be covered in basic tourism curricula. It is hoped that other countries will adopt a similar (or the same) curriculum list. Truly, with increasing international competition, *It is not education that will save us, but education of a certain kind* (Orr, 1990:351).

REFERENCES

BMI see BUSINESS AND MARKETING INTELLIGENCE.

BUSINESS AND MARKETING INTELLIGENCE, 1997, *Tourism training needs and resources in South Africa: a situation analysis to assist in the formulation of a tourism training strategy*. (South Africa: Rivonia).


SAAYMAN, M., 2000, En route with tourism, (Potchefstroom: Leisure Consultants and Publications).


WOLHUTER, R., 2000, Verbal communication with Me. R. Wolhuter, lecturer tourism, (Witwatersrand Technikon: 23 Mar).
## CONTENT OF A BASIC THREE YEAR BA-DEGREE

<table>
<thead>
<tr>
<th>FUNDAMENTAL UNITS</th>
<th>CORE UNITS</th>
<th>ELECTIVE UNITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer literacy</td>
<td>Sports tourism</td>
<td>Ecotourism/Nature Tourism</td>
</tr>
<tr>
<td>Communication skills (Read, write and speak)</td>
<td>Cultural tourism</td>
<td>Marine Tourism</td>
</tr>
<tr>
<td>Foreign language (own choice)</td>
<td>Resort management:</td>
<td>Dark Tourism</td>
</tr>
<tr>
<td>Basic knowledge of the tourist and tourism industry:</td>
<td>Guesthouse/Lodge Management</td>
<td>Cruise Ship Management</td>
</tr>
<tr>
<td>Definitions</td>
<td>Conference tourism</td>
<td></td>
</tr>
<tr>
<td>Components</td>
<td>Planning and development</td>
<td><strong>Ski-Resort Management</strong></td>
</tr>
<tr>
<td>Advantages</td>
<td>Inbound tourism knowledge</td>
<td></td>
</tr>
<tr>
<td>Disadvantages</td>
<td>Outbound tourism knowledge</td>
<td></td>
</tr>
<tr>
<td>Impacts of tourism</td>
<td>Tourism legislation</td>
<td></td>
</tr>
<tr>
<td>Globalisation</td>
<td>Total quality service</td>
<td></td>
</tr>
<tr>
<td>Ethics in tourism</td>
<td>Total quality management</td>
<td></td>
</tr>
<tr>
<td>Research methodology</td>
<td>Business Management</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Financial Management</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Marketing Management</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Entrepreneurship</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
MODEL 2: PROPOSED MODEL FOR A CORE TOURISM CURRICULUM

1st year
2nd year
3rd year
4th year
Education as a factor of efficiency in tourism

Zoran Jašić, University of Zagreb

Abstract

Production function in tourism in addition to quantifiable inputs of labour and capital has its specific residual. It comprises qualitative factors – education and technological changes. Those factors are complementary.

Their contribution to increase of efficiency in tourism is methodologically difficult to quantify. Residual in tourism produces positive and negative spill over effects. In mass tourism the effort should be made to reduce negative impact of tourism on environment. In a framework of development policy, where tourism in developing countries is playing a great role, an optimal trade off should be found between tourism and sustainable development.

Through diversifications in tourism industry organisational and other efforts should be made to maximise positive spill over effects through generating contribution to human capital and enculturation.

Key Words: education, tourism, efficiency, homo-touristicus, diversification, human capital, spill over effects, sustainable development
1. INTRODUCTION

The topic of education as a factor of efficiency in tourism can be approached from different points of view.

The classic approach was mainly concerned with analysis of educational structure in hotel industry and its impact on productivity (as a measure for efficiency). Productivity in turn depended on endogenous and exogenous factors.

Usually the standardized structure of employees in tourism and catering industry in terms of educational degree, was presented for the statistical and other purposes in the following way: university degree, college degree, secondary school degree, elementary school degree, highly skilled worker, skilled worker, semi-skilled worker and unskilled worker.

Endogenous factors that impact on productivity are: type of ownership, personnel qualification structure, efficiency of work organization and planning, internal regulations dealing with work and remuneration, wages and other income, staff motivation and skill, permanent education and career planning for talented personnel, business ethics, and most recently adherence to internationally recognized hotel working standards, which are closely related to product and service quality.

Exogenous factors which determine the productivity in tourism are those dealing with economic development of the tourism receiving country such as: the achieved level of economic development, the existing sectoral structure of economy, rate of growth of GNP, the available infrastructure (roads, air transportation, telecommunication), ecology (adherence to the concept of sustainable development), regional and local development, the image and the acceptance of tourism and hospitality sector in terms of sectoral priority when it comes to the development strategy of a particular country.

Given a host of those endogenous and exogenous factors it is difficult to construct a single quantitative indicator of contribution of education to efficiency of tourism since education has been intertwined with other factors of productivity (usually measured as increased earning per employee).

2. TOURISM IN ERA OF GLOBALISATION

The contemporary approach to a study of contribution of education to efficiency of tourism industry should take into account two processes with which the phenomenon of tourism deals with: the process of globalisation and process of diversification.

In comparison to the classical case described above, the role of education in era of globalisation is increasingly becoming complementary to the technological innovations in transportations and communications industries. Those industries permanently generate positive spill over effects for a tourism industry (increasing returns to scale) which are contributing to decreasing cost of air transport and in turn to growth of international tourist arrivals (670 million in 2000). According to the recent data each tenth employee in the world works in tourism and travel industry (ITC, 1999).

Those data support the claim that tourism should be considered as one of the world’s fastest globalising industries. At the core of this statement is the fact that tourism implies movement, which is also one of the main characteristics of the phenomenon of globalisation.
In a narrow economic sense the term globalisation stands for ever increasing interdependence of markets and production in different countries through increasing mobility of information, capital, trade in goods and services, and movements of people. Globalisation stimulates international strategic alliances, mergers and transfer of know-how. Closely connected with phenomenon of globalisation is the increase in the international division of labour, fragmentation of production and political trend towards a more liberal world economic order.

The globalisation in tourism industry shows its advantage especially on the supply side when the different destinations compete with each other on a global scale. The most important supply factors are (Smeral, 2001):

- Suppliers acting globally and the impact of computerized information and reservation systems.
- Globally active airlines, hotel chains and tour operators already have branches through the world and cover major parts of international tourism demand with their global distribution system (GDS). Strategic alliances, cooperation’s and/or mergers are additional driving forces of the globalisation process.
- The use of modern information and communication technologies in connection with various forms of horizontal, vertical and diagonal integration extends the value chain. This is particularly true for destination management systems.
- Decreasing costs for air travel and ready access to destination of relatively low price and income levels as well as relatively low social standards.

For a tourism enterprise operating in a multinational market there are additional advantages to increased size. (Cooper et al, 1996: 270):

- Economies of scale.
- Ability to resource high-profile promotional campaigns.
- Brand name benefits through standardization and quality control.
- Ability to spread the risk among various markets.
- Implementation of advanced marketing techniques on an international basis.
- Utilization of technology (especially CRS).
- Optimisation of capacity/inventory usage and reduction of seasonality problems.
- Access to the international labour market.
- Advantages over other members of the distribution channel.
- Improved political influence.
- Managers who have more time to “manage”.
- Market prominence and stronger branding.

Fast tourism growth in era of globalisation generates negative spill over effects as well. These effects in Smeral’s view (2001:10) conflict with the principles of sustainable development. Tourism demand affects many goods and services as well as natural resources. In most cases, meeting tourism demand and demand for the related leisure – time activities requires environmental factor as an input. A consequence of this development results in an excessive strain on the use of environmental resources.

Some Mediterranean countries have already experienced the consequences of excessive growth of tourism industry that had adverse effects on the state of their environment. This situation is according to Smeral (2001:11) “result of long-term overdevelopment on the
supply side in certain areas as well as the strong regional and seasonal concentration of tourism”.

In order to find a proper trade-off between the expansion of tourism and adequate preservation of environment there should be an increasing awareness concerning the complexity of the phenomenon of sustainable development.

By its very nature sustainable development is not only a challenging topic for development of tourism but also for educational scientists as well as for decision-markers dealing with economic policy. This new paradigm that is emerging dealing with economic aspects of sustainable development is based on a broader view of economic activity that pays greater attention to the physical and biological environment within which production and consumption take place.

Within this framework environment costs must be internalised rather than transferred to other current or future generations (Panayoto, 1993: X).

According to Bruntland Report (1987), we can define the sustainable development in the following way.

“Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs. It contains within it two concepts:

- the concept of “needs”, in particular the essential needs of the world’s poor, to which overriding priority should be given; and
- the idea of limitations imposed by the state of technology and social organization on the environment’s ability to meet present and future needs”.

Sustainable development should integrate environmental, social, cultural and economic sustainability and should use these four dimensions in order to make a head start on achieving viability (Saleem, 2001: 27-29):

- The ecological segment of sustainability focuses on minimizing or avoiding the environmental damages of tourism industry. Precondition to minimize the environmental impacts is the proper evaluation of ecological carrying capacity which is lower than physical capacity (availability of the space, the shape of the landscape as well as carrying capacity of the land);
- Social sustainability in tourism refers to the ability of community, whether local or national, to absorb input, such as extra people, over short or long periods of time. One of most important sources of disharmony can appear in the form of increasing differences between the beneficiary of tourism and those who are marginalized by it, or through the creation of geographical ghettos, either of the tourists themselves or of those excluded from tourism.

- Cultural sustainability deals with question of how already established cultural milieu is going to react on changes brought by tourism. The question arises to which extent local people (indigenous population) will be able to retain or adopt elements of their culture which distinguishes them from other people.

- Economic aspect of sustainability in tourism development refers to a level of economic gain from the activity which is sufficient either to cover the cost of any special measures taken to cater to the tourists and to mitigate the effects of the tourists presence or to offer an income appropriate to the inconvenience caused to the local community visited – without violating any of other conditions – or both.
Each country depending on specific circumstances is trying to find a proper balance between expansion of tourism and sustainable development. English Tourist Board proposed the following principles for sustainable tourism (Cooper, 1996:87):

- “The environment has an intrinsic value which outweighs its value as a tourism asset. Its enjoyment by future generations and its long-term survival must not be prejudiced by short-term considerations.
- Tourism should be recognized as a positive activity with the potential to benefit the community and the place as well as the visitor.
- The relationship between tourism and the environment must be managed so that the environment is sustainable in the long term. Tourism must not be allowed to damage the resource, prejudice its future enjoyment or bring unacceptable impacts.
- Tourism activities and developments should respect the scale, nature and character of the place in which they are sited.
- In any location, harmony must be sought between the needs of the visitor, the place and the host community.
- In a dynamic world, some change is inevitable and change can often be beneficial. Adaptation to change, however, should not be at the expense of any of these principles.
- The tourism industry, local authorities and environmental agencies all have a duty to respect the above principles and to work together to achieve their practical realization.”

In formulating tourism policy in developing countries it is useful to follow the set of guidelines for pursuing the goal of sustainable development (Panayotou, 1993:148,149).

- Ensure self – renewal of renewable resources by preventing overexploitation and mismanagement;
- Prevent unnecessary environmental damage from the extraction and processing of both renewable and non-renewable resources;
- Promote recycling where it is economically and environmentally beneficial;
- Avoid irreversible environmental effects;
- Undertake environmental protection measures that can be shown to have economic benefits that exceed their economic costs;
- Emphasize effective protection over rehabilitation on grounds of greater cost – effectiveness.
- Adopt the principle “users and polluters pay” to internalise scarcity and environmental costs;
- Assess the environmental effects of sectoral and macroeconomic policies and internalise them, partly by adjustment of these policies and partly by mitigation of residual impacts.
3. THE ROLE OF EDUCATION IN DIVERSIFICATION OF TOURISM INDUSTRY

The previous section stressed the supply side of tourism by emphasizing the advantages of tourism enterprises operating in multinational markets of tourism creating countries.

We came to conclusion that contribution of education to efficiency was intertwined with innovation in transportation and information technology. This way of conducting tourist business was branded as a mass tourism.

Nowadays new trends in tourism industry are emerging. They differ from the pattern of mass tourism which sometimes was reduced to phenomenon of entertainment (sun, see, sand). New tendencies in tourism industry are favouring diversifications of tourist product in accordance with philosophy of “NEW TOURISM” (Laesser and Jeager in Cooper, 1996:40), where the leisure time is a precarious resource.

*Homo Turisticus* is now approaching tourism by departing from new broader insights, by choosing new priorities on Maslow’s hierarchy of needs.

Opaschowski, Kaspar and Cohen quote according to (Vukonić, 1996:46) the whole spectrum of needs, motives and modes which give an impulse to diversification of specialized segments of tourism.

Opaschowski lists eight needs: the need for recreation, compensation, education, contemplation, communication, integration, participation and enculturation. Kaspar and Cohen both distinguish five major areas of tourist motives, but they differ in the motives they list. Kaspar mentions physical, psychological, interpersonal and cultural motives, as well as motives connected with persons’ reputations or status, within the framework of his *Motivbereiche*. Cohen’s list of “modes” includes recreational, diversionary, experimental, and existential ones.

The religious tourism is one of the main out-springs in the process of diversification in this industry. Not only has religion recognized tourism as a phenomenon of modern civilization, but has accepted it as a new and interesting way of life, in which “humanity moves from a static understanding of the order of reality to a dynamic and evolution understanding” (Gandium et Spes No. 5). In this situation the church wishes to “help make tourism, conducted always in a perfect framework and with noble standards, an important factor of modern education, a link of understanding and peace among nations, making possible and ever greater raising up of the spirit worthy of the blessed contemplation of God” (Vukonić, 1996:103).

In addition to religious tourism there are more recently appearing specialized branches of tourism as a reflection of specific needs of *Homo Turisticus*. Those needs are to a great extent correlated with the process of ever faster obsolescence of already acquired knowledge. In turn, it creates demand for individually tailored tourism where a consumer of tourist services looks not only for entertainment but for enlargement of his human capital and enculturation. There is an increasing role of education. Education at all levels according to Ohmae (2001: 233) has become the weapon for winning the new war. This time, education will not exist to teach knowledge to last for decades, but to impart wisdom to challenge the status quo and learn the paths as you go. Self-denial and self renewal are the only sure passports to the parts of entry into “invisible continent” (metaphor for the accelerated evolution of computer and communications technology). People look for educational tourism which fulfils their needs of learning foreign languages in their native countries.
The sport and recreation tourism offers the whole spectrum of contents which contribute
to health and quality of life of participants as well as increases returns to scale of economic
benefits to those hotels were facilities for sports and recreation are provided.

Sport and recreation facilities prolong the tourist season and contribute to better use of
capacity. It is interesting to mention that the prolonging of the season was an impulse to
develop a specialized subject – the economics of tourism and recreation - where interna-
tionally acknowledged contribution were made at the Faculty of Economics and the Faculty
for Physical Culture (e.g. Bartoluci, M. and Čavlek, N. 1998).

Diversification in tourism industry continuously adds to the offer of new tourist prod-
ucts like visits to exhibition of famous painters or visits to concerts which in turn means the
promotion of tourism of world metropola. In that way modern tourism industry is in fact
exercising Porter’s clusters concept, where through sophisticated management an optimal
economic way is used complementarily with cultural heritage of great cities (monuments,
exhibitions, concerts).

In summing up we can say that individually tailored tourist products in process of diver-
sification, in contrast to mass tourism, has a direct impact on a formation of human capital
and enculturation of Homo Turisticus.

That fact at the same time puts pressure on management in tourism business to take care
of sensitivity of Homo Turisticus who demands special tourist products and high quality of
services. They behave according to the rule “You never get the second chance to make a
first impression”.

In order to increase efficiency of Croatian tourism the cluster concept should play more
important role in the future than it did in the past. Specific instruments of economic policy
in tourism sector are needed, as a conclusive environment to produce synergy of comple-
mentary elements of particular cluster.

Cities along the Dalmatian coast like Zadar, Split, and Dubrovnik with a variety of his-
torical and cultural heritages badly need new impulses through economic policy to present
their advantages, as favourable tourist destinations in a global tourist market.

Through the cooperation of central and local levels of government more consistency and
coordination should be brought among the policy instruments dealing with urban develop-
ment, development of local infrastructure, preservation of environment according to the EU
standards, and conservation of cultural heritage. The second set of policy instruments should
in the long run define tax credits as stimuli for more investment in heritage preservation.

Cluster concept of tourism in a very specific way fits well with the characteristics of
Adriatic islands. According to the Human Development Report, Croatia (UNDP, 1999:78)
Croatian islands show at least two groups of characteristics which call for specific interven-
tion by central and local governments in order to stimulate the development of tourism:

1. “The islands in their presence and the islanders in their consciousness have preserved
the major values of national identity. From the archeological sites, sacred and secular
buildings, over the glagoliza script, writings and literary heritage to all kinds of crofts
and shills they are all administrable features of the national identity and continuity.

2. The islanders are determined by two seemingly contradictory peculiarities: on one
hand a high degree of autonomy and self-containment i.e. necessarily relying on
themselves and their own microcosm, and on the other on enviable degree of open-
ness toward civilization by achievement primarily resulting from the positive effects
of the sea and sailing.”
4. CONCLUSION

Impact of education on efficiency in tourism industry is multidimensional. It is methodologically difficult to measure its impact in quantitative terms.

In case of mass tourism contribution of education to efficiency is intertwined with contribution of technological progress in transportation (leading to decreasing price of transportation) as well as with new developments in information technology.

By the individually tailored tourist products most recently *Homo Turisticus* is becoming very sensitive to fulfilling his needs and allocation of free time. Elements of education and enculturation are playing ever increasing role in his priorities when choosing tourist product.

He is all the time demanding improvement of tourist services, as a precondition to obtain benefits he expects from a particular tourist product.

REFERENCES


Ecotourism development - principles and content
for this instructional offering

1Coetzee, W.J.L. (Willem), Technikon PRETORIA, South Africa

Abstract:

Rapid development of tourism in South Africa has brought to light an increasingly urgent need to supply adequate numbers of skilled personnel in the tourism sector. The government of South Africa has seized upon this newfound interest and has promoted tourism as an opportunity to earn much-needed foreign exchange.

Literature indicates that sustainable tourism development connects tourists and providers of tourist facilities and services with advocates of environmental protection and community residents and their leaders who desire a better quality of life. That leaves tourism educators at a point where we must accept a holistic approach in curriculum design.

A curriculum that will intercept the
- Social/ cultural factors of global culture; authenticity; otherness; indigenous groups and new middle classes and lifestyles;
- The economic view of economic linkages; work ethic; global economy; foreign exchange and sustainable development; and
- The environmental factors of conservation and preservation; ecology and sustainability; conservation ethic; the community with their cultural & natural resources.

It is argued that there is something hugely contradictory in viewing the underdeveloped country solely through an analysis of economic factors. Factors that associate South Africa with overpopulation, poverty and crime at the one end of the continuum. At the other there are the views of South African as friendly people, natural environments and ecological and cultural diversity.

This paper presents a review of current tourism education at Technikons in South Africa in terms of the educational programs and argues that education for tourism at degree level in the third world needs to be more community-centered sustainable tourism.

Keywords: South Africa; Ecotourism; development

1 Technikon PRETORIA, Department: Tourism Management, Private Bag X680, Pretoria 0001, South Africa
Phone number: work +27 12 318 5564, mobile +27 82 925 1491, fax +27 12 318 5510;
E-mail: coetzcew@techpta.ac.za
Introduction

Rapid development of tourism in South Africa has brought to light an increasingly urgent need to supply adequate numbers of skilled personnel in the tourism sector. The government of South Africa has seized upon this newfound interest and is promoting tourism as an opportunity to earn much-needed foreign exchange.

Literature indicates that sustainable tourism development connects tourists and providers of tourist facilities and services, with advocates of environmental protection and community residents and their leaders, who desire a better quality of life. According to Honey (1999:4) “Ecotourism has been hailed as a panacea: a way to fund conservation and scientific research, protect fragile and pristine ecosystems, benefit rural communities, promote development in poor countries, enhance ecological and cultural sensitivity, instill environmental awareness and a social conscience in the travel industry, satisfy and educate the discriminating tourist, and, some claim, build world peace.”

In 1996 the White Paper on Development & Promotion of Tourism in South Africa was drawn up with the following vision (White paper, 1996:14):

“...To develop the tourism sector as a national priority in a sustainable and acceptable manner, so that it will contribute significantly to the improvement of the quality of life of every South African. As a lead sector within the national economic strategy, a globally competitive tourism industry will be a major force in the reconstruction and development efforts of the government.”

The White Paper compels tourism educators in South Africa at a point where we accept a responsible tourism approach in curriculum design. A holistic curriculum will need to include the:

- Sociocultural factors of global culture; authenticity; “otherness”; indigenous groups, and new middle classes and lifestyles;
- An economic view of linkages; work ethic; global economy; foreign exchange and sustainable development (Ross & Wall, 1999:677); and
- Environmental factors of conservation and preservation; ecology and sustainability; conservation ethics; and the community with its cultural and natural resources (Orams, 1995:3; Orams, 1999:24; Ross & Wall, 1999:678).

This paper presents a review of current tourism education at Technikons in South Africa in terms of educational programmes and argues that education for tourism at degree level in the third world must aim to be more community-centered tourism. This could also be seen as the “Africanisation” of the curriculum, motivated by a statement made in the White Paper (1996:14) that:

“The greatest deficiency in the tourism industry in South Africa is the absence of adequate education, training and awareness opportunities. The previously neglected groups in society are highly disadvantaged and the job of leveling the playing field in a massive one. One of the key vehicles for doing so is education and training – a basic necessity that the majority of the population has not had access to.”
This paper will focus on the following issues:

- The pull-factors to South Africa are precisely the factors that we traditionally did not enforce in tourism students;
- The tourism curriculum in a culturally diverse South Africa should address certain inclusive factors, factors that will shape students for the international visiting market;
- A culturally inclusive tourism curriculum is a vehicle for community development.

**Pull-factors and other statistics of South African tourism**

South Africa society portrays a fascinating mix of cultures. It can be seen as a rich “fruit salad in which some cultural elements have remained the same over long periods of time, while some uniquely South African-cultural expressions have evolved. In the village, town and city life, in clothes and fashion, in worship, in the 11 official languages reflecting literature and storytelling, South Africa’s multiculturalism, its unity and its diversity, and its essence as a World in One Country, is portrayed.

We recognize the remarkable biological and cultural diversity of South Africa; our diversity is what makes our country attractive (White Paper, 1996:1) (4) to visitors. We have a wealth of cultural and natural heritage resources, which can be enjoyed by local people, and domestic, regional and international visitors traveling in South Africa as tourists. The customs and traditions of our people, their heritage, history and way of life is something to introduce to tourists (White Paper, 1996:v). If we want to develop tourism with dignity, encouraging mutual respect and promoting the diversity of cultural resources in our country (White Paper, 1996:25) we as educators need to address these challenges in the classroom.

Responsible Tourism is not only the key guiding principle for tourism development in South Africa (White Paper, 1996:20) but also a guiding principle for educators in this rainbow nation. Responsible tourism is not a luxury for SA; it is an absolute necessity if SA is to emerge as a successful international competitor (White Paper, 1996:20). Educators can make a significant impact to improve the tourism product, the livelihoods and quality of life of local people (White Paper, 1996:23) if we educate responsible tourism leaders for the industry.

Since the political changes in 1994, the profile of visitor interest in South Africa has shown a market change. A SATOUR survey shows that 26% of overseas visitors are coming to see South Africa after the political change, and 21% are interested in South Africa’s cultural attractions. SA decision to adopt a responsible tourism approach was a fresh approach (White Paper 1996:20) that offers a competitive advantage.

Traditionally South Africa’s unique selling points have been Scenic Beauty, Wildlife and Climate. Interest in African cultures was rated at only 6% for many years. However, since the political changes in 1994, the profile of visitor interests has shown a marked change (Table 1), an exiting 29% are interested in South Africa’s cultural attractions (Table 2).

The country’s growing domestic market attributes some 67% of the total tourism industry in South Africa and year-end statistics for 2000 - published by Statistics South Africa - indicated a growth of 2.7% in the total number of overseas tourists visiting South Africa between January to December 2000. This implies a rise in overseas tourist from 1,49m in 1999 to 1.53 million in 2000. This South African trend (an increase in tourism activities) is
in line with trend displayed by the international market. With the exception of Italy, which posted a nominal decline in arrivals for 2000 from the previous year (down 38,757 to 38,195), overseas' markets in general recorded above-average growth in visitor arrivals during 2000, maintaining an average growth rate of 2.4%.

*Table 1 Attractions prior to visit (Air arrivals)*

<table>
<thead>
<tr>
<th>ATTRACTION</th>
<th>Jan 95</th>
<th>Aug 95</th>
<th>Jan 96</th>
<th>Aug 96</th>
<th>Jan 01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenic beauty</td>
<td>33</td>
<td>24</td>
<td>29</td>
<td>30</td>
<td>32</td>
</tr>
<tr>
<td>Wildlife</td>
<td>19</td>
<td>23</td>
<td>21</td>
<td>30</td>
<td>33</td>
</tr>
<tr>
<td>To see SA after 1994</td>
<td>24</td>
<td>26</td>
<td>21</td>
<td>26</td>
<td>22</td>
</tr>
<tr>
<td>Culture</td>
<td>17</td>
<td>17</td>
<td>15</td>
<td>21</td>
<td>29</td>
</tr>
<tr>
<td>VFR</td>
<td>19</td>
<td>19</td>
<td>21</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Business interest</td>
<td>18</td>
<td>19</td>
<td>18</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Curiosity</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Diversity of attractions</td>
<td>8</td>
<td>7</td>
<td>7</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Climate</td>
<td>20</td>
<td>7</td>
<td>15</td>
<td>8</td>
<td>15</td>
</tr>
<tr>
<td>Value for money</td>
<td>8</td>
<td>3</td>
<td>5</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Facilities</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Other</td>
<td>9</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Not a matter of choice</td>
<td>9</td>
<td>6</td>
<td>4</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>159</td>
<td>164</td>
<td>170</td>
<td>191</td>
<td>221</td>
</tr>
</tbody>
</table>

*Table 2: Patterns with regards to cultural attractions (SATOUR)*

<table>
<thead>
<tr>
<th>Cultural Attractions</th>
<th>Visitors (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historical sites</td>
<td>40</td>
</tr>
<tr>
<td>Experience of a museum &amp; art gallery</td>
<td>37</td>
</tr>
<tr>
<td>Cultural village</td>
<td>26</td>
</tr>
<tr>
<td>Theatre</td>
<td>19</td>
</tr>
</tbody>
</table>

Source: SATOUR – Cultural campaign
If one analyses some specific statistics related to South Africa, it is clear that the following international markets show a continued interest and confidence in the South African tourism industry:

- Visits from the United Kingdom are up 5% from 1999 (335,000 to 350,000);
- Visits from France is up 6% from 84,460 to 89,573;
- Visits from the Netherlands is up 6% from 85,586 to 91,154;
- Visits from the USA is up 5% from 166,236 to 174,728;
- Visits from Central and South America is up 9% from 42,284 to 46,094;
- While arrivals from the German market grew just below the market average at 2% (205,955 to 210,227).

The reason for the slight decline over the 1999-2000 period is attributed primarily to a percentage drop in arrivals from the rest of Africa (down from 4,285,112 in 1999 to 4,235,725 in the year 2000). African air arrivals nevertheless increased by some 8% - from 259,000 arrivals in 1999 to 281,000 in 2000.

With its roots in the heart of Africa, South Africa has a number of indigenous groups, with different languages, customs, dress-styles and architectures. Add to this a large cross-section of settlers from the East and West who have, to varying degrees, kept their own unique cultural expressions, and one finds a country pulsating with contrast, that the Government has adopted the slogan “Unity in Diversity”. It is my view that a new tourism curriculum would be an ideal vehicle to address cultural diversity and exploit this phenomenon to make students aware of the tourism potential within our diverse cultures.

From the preceding section it is clear that the following statement of Gunn (1998:72) is significant: “there is no single model curriculum that will apply equally to all needs of tourism education and training. Instead, administrators and educators need first to define the expected outcome of a curriculum—for which it is intended. The purpose is to provide students with needed tools and to educate them in ways that will enable them to accept the responsibilities required in the future.”

Gunn (1998:73) concludes that: “for tourism, it is likely that the present business-oriented curricula will be expanded to include the many social, economic, and environmental impacts, as well as business and visitor ethics”. With this statement in mind it is exactly what the two new South African qualifications in ecotourism and adventure tourism intend to address.

Eco- and adventure tourism are two offerings that are ideally suited to the practice of quality teaching. Factors such as cultural, rural and development issues could be reflected easily in the new tourism curriculum. It must be stressed that these qualifications may still be viewed as “western paradigms” but the focus is much stronger on expected outcomes, relevant to the South African context.

While basic education underpins any environmental and tourism development education, the latter needs to be incorporated as an essential part of learning. Education is also critical for achieving environmental and ethical awareness, values and attitudes, skills and behaviour consistent with sustainable tourism development and for effective public participation in decision-making (Myburgh & Saayman, 1999:225).

In thinking about the implementation of a multicultural ecotourism perspective it is helpful to keep the principles of responsibility, flexibility, equity, inclusiveness and respect
(Sachs, 1993) in mind. The following principles (White Paper, 1996:21) will guide the development of responsible tourism in the South African tourism education curriculum:

- Tourism will be private sector driven
- Government will provide the enabling framework for the industry to flourish
- Effective community involvement will form the basis of tourism growth
- Tourism development will be underpinned by sustainable environmental practices
- Tourism development is dependent on and the establishment of cooperation and close-partnerships among key stakeholders
- Tourism will be used as development tool for the empowerment of previously neglected communities and should particularly focus on the empowerment of women in such communities
- Tourism development will take place in the context of close cooperation with other states in Southern Africa
- Tourism development will support the economic, social and environmental goals and policies of the government

The government is committed to effectively managing and conserving the cultural resources of SA. The following guidelines were put forward by the South African government (White Paper, 1996:21):

- Ensure tourism takes note of the cultural heritage resources within specific communities and environments
- Cultural resources should be managed to the negotiated benefit of all interested parties within the communities
- Access to management of cultural resources should be as broad as possible within specific communities and should promote co-operation between all affected parties
- Landuse planning and development projects for tourism should include effective protection and sustainable utilization of cultural resources

In accordance with the tourism vision for SA, a united, sustainable and competitive tourism industry in SA will lead global ‘best practice’ in socially, environmentally and culturally responsible tourism (White Paper, 1996:15). This vision of cultural inclusion will be realized in the new curriculum in accordance with the following principles that will maintain and encourage social and cultural diversity White Paper (1996:24):

- Develop tourism with dignity and respect; nurture local cultures, so that they enrich the tourism experience and build pride and confidence among local communities
- Use tourism as a catalyst for human development, focusing on gender equalities, career development and the implementation of national labor standards
- Tourism development should not compromise respect for social and cultural rights, to the essential human rights of people to food, a safe and clean environment, work, health and education
- Support the development of skills and earnings of women, particularly in rural areas
- Respect and develop local cultures and protect them from over-commercialization and over-exploitation (White Paper, 1996:19)
- Develop forms of tourism, which promote pride in local cultural resources (White Paper, 1996:25)
- Understand community and tourism enterprise stability, hierarchies and conflicts in interactions between parties
- Create opportunities for visitors to interact with locals in an unobstructed, spontaneous manner
- Provide visitors with inclusive, honest and reliable information about local tourism attractions and facilities
- Promote a sound service ethic among all participants in the tourism industry
- Promote and ensure the respect and dignity of people in the development, marketing and promotion of tourism (White Paper, 1996:56)
- Be aware of potential negative impacts on local communities

While the tourism industry has tremendous potential to create jobs, it is clear from the above-mentioned guidelines that the government recognizes that appropriate skills and experience are necessary to facilitate employment growth as well as international competitiveness. The following critical success factors were identified and forms the cornerstone for ecotourism development (White Paper, 1996:15)

- Sustainable environmental management practices
- Involvement of local communities and previously neglected groups
- A safe and stable tourism environment
- Globally competitive practices, by offering quality services and value for money
- Innovative and responsive to consumer needs
- Focus on product enhancement and emphasis diversity
- Effective tourism training, education and awareness
- Creative and aggressive marketing and promotion
- Strong economic linkages with other sectors of the economy
- Appropriate institutional structures
- Appropriate supportive infrastructure

These critical success factors are addressed in ecotourism development, and students are trained to develop ecotourism in a sustainable and responsible manner.

**Instructional offering: Ecotourism development**

Tourism education and training is one of the fundamental pillars of the development of a new responsible tourism in SA. The main principles and course content governing tourism development for responsible tourism education and training are as follows:
<table>
<thead>
<tr>
<th><strong>Ecotourism Management</strong></th>
<th><strong>Year I</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecotourism Development I</td>
<td>An introduction to the travel and tourism industry</td>
</tr>
<tr>
<td></td>
<td>An introduction to ecotourism</td>
</tr>
<tr>
<td></td>
<td>Tourism in developing countries</td>
</tr>
<tr>
<td>Ecotourism interpretation I</td>
<td></td>
</tr>
<tr>
<td>Ecotourism interpretation II</td>
<td></td>
</tr>
<tr>
<td>Ecotourism Marketing I</td>
<td></td>
</tr>
<tr>
<td>Wildlife management I</td>
<td></td>
</tr>
<tr>
<td>Bio-diversity I</td>
<td></td>
</tr>
<tr>
<td>Ecotourism Practice I</td>
<td></td>
</tr>
<tr>
<td>Ecotourism Management I</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Ecotourism Management</strong></th>
<th><strong>Year II</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecotourism Development II</td>
<td>Tourism and sustainability</td>
</tr>
<tr>
<td></td>
<td>Tourism and indigenous people</td>
</tr>
<tr>
<td></td>
<td>Cultural tourism</td>
</tr>
<tr>
<td></td>
<td>Rural tourism</td>
</tr>
<tr>
<td></td>
<td>Marine tourism</td>
</tr>
<tr>
<td>Ecotourism Marketing II</td>
<td></td>
</tr>
<tr>
<td>Bio-diversity II</td>
<td></td>
</tr>
<tr>
<td>Ecotourism Practice I</td>
<td></td>
</tr>
<tr>
<td>Wildlife management II</td>
<td></td>
</tr>
<tr>
<td>Interpretation III</td>
<td>Field guiding</td>
</tr>
<tr>
<td></td>
<td>Community involvement &amp; development</td>
</tr>
<tr>
<td>Computer studies I</td>
<td></td>
</tr>
<tr>
<td>Ecotourism Management II</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Ecotourism Management</strong></th>
<th><strong>Year III</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecotourism Development III</td>
<td>Heritage visitor attractions</td>
</tr>
<tr>
<td></td>
<td>Ecotourism planning</td>
</tr>
<tr>
<td>Bio-diversity III</td>
<td></td>
</tr>
<tr>
<td>Ecotourism Management III</td>
<td></td>
</tr>
<tr>
<td>Experiential training I + II</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Ecotourism Management</strong></th>
<th><strong>Year IV</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecotourism Development III</td>
<td>Managing tourism growth</td>
</tr>
<tr>
<td></td>
<td>Planning &amp; EIA</td>
</tr>
<tr>
<td>Ecotourism Management III</td>
<td></td>
</tr>
<tr>
<td>Bio-diversity III</td>
<td></td>
</tr>
<tr>
<td>Research methodology</td>
<td></td>
</tr>
</tbody>
</table>
Conclusion

Multiculturalism in the tourism curriculum means that the various South African cultures are addressed. Subjects must aim to provide a knowledgebase in the philosophy and culture of South African society. The more recent attempts to introduce Indian Music and Dance and ‘Music’ of the World, a project (in Mauritius) that is elaborated by the Conservatoire Francois Mitterand to provide learners with exposure to different types of musical traditions, seem to be moving in the same direction (Nirsimloo-Gayan et al. 1994:55). Within the tertiary sector of education, the broadening of the curriculum to include areas of cultural studies is a major means of reflecting the cultural reality of the society, and of preserving cultural heritage. Ecotourism, as an instrument of social change, if used with caution, can play a determinant role in promoting multiculturalism.

Bibliography


Assuring quality in tourism and hospitality management education

Ivanka Avelini Holjevac1, Faculty of Tourism and Hospitality Management Opatija
Vidoje Vujic, Faculty of Tourism and Hospitality Management Opatija
Mustafa Prohic, Faculty of Tourism and Hospitality Management Opatija

Abstract

Higher education institutions need to respond to the requirements created by a new environment characterized by the emergence of knowledge-based economies and societies. It is obvious that, in a world where knowledge and creativity have become the most important source of value creation, human capital will be a prime ingredient of business competitiveness and that the quality of education and training will be crucial for achieving that goal.

Tourism and hospitality industries are undergoing structural changes and are demanding new forms of management. Companies need new approaches to management development for the challenges of the 21st century. There is a need to rethink the current models and practice of university level higher education.

This paper proposes a framework for assuring quality in higher education for tourism and hospitality management, based on the principles of TQM and the process approach to quality management systems. A combination of the WTO TedQual Certification System and the ISO 9000 standard as the formal quality assurance model is recommended. A comparative analysis of degree programmes in tourism and hospitality management in colleges and universities in the USA, Europe and Australia is presented. Such an analysis forms the basis of a discussion of problems surrounding the efforts for international harmonization of tourism and hospitality management education. The conclusions underscore the need for, and the usefulness of, a soundly grounded approach to the assurance of quality and international standards (flexible) in higher education institutions in tourism and hospitality management.

Key words: management education, tourism and hospitality, TQM, quality assurance, ISO 9000.

1 Ivanka Avelini Holjevac, Primorska 42, p.p. 97, 51410 Opatija, Croatia, tel. 00385 292 633, fax. 00385 291 965, Ivanka.Avelini.Holjevac@hika.hr
1. INTRODUCTION: KNOWLEDGE INDUSTRY - A VISION FOR THE 21ST CENTURY

Education and training for tourism generally, and for tourism and hospitality management specifically, is in need of major transformation to meet the requirements of the new environment characterized by the globalization of the economy and the emergence of knowledge-based economies and societies. The knowledge industry is constantly developing and gaining importance and in the 21st century it will become one of the dominant world industries. It is an industry which will support economic and social development so that education and education quality will become a part of the strategy of all developed countries (which is particularly emphasized in OECD and European Union documents).

The industry of knowledge is a global industry, unrestricted by state boundaries. Knowledge is global and belongs to everyone. Communication technology in the 21st century will enable everyone to access and participate in the process of learning and acquiring knowledge.

In the last few years large changes in the organization of business have occurred. Tasks are not strictly divided but are integrated within the work place and through teamwork. Knowledge and work based on knowledge should provide every human being with a financially and spiritually richer environment.

Every nation and every country will tend to become a part of this global industry of knowledge. Great changes are anticipated in the national systems of education and science in which knowledge is generated. Large investments in these institutions are expected, as knowledge becomes the basis of competitive advantage on the global marketplace.

The globalization of knowledge is a great opportunity and challenge in the general trend of globalization. When knowledge becomes a universal commodity, the process of knowledge globalization can begin. This process involves the creation of a unique global framework and common scientific and educational standards, as well as a free international flow of knowledge.

The development strategy of Croatia for the 21st century should be based on the vision of a knowledge-based society and economy, and the educational system should be adapted to the demands for innovations created by new knowledge. The economic development of Croatia will to a large extent depend upon the development of tourism and hospitality industries, which are the important strategic driving forces of economic growth, development and increased employment.

It is becoming increasingly obvious that, in a world where knowledge and creativity have become the most important source of value creation, talented human capital will be a prime ingredient of business competitiveness and that the quality of education and training will be an important instrument for achieving that goal. On the other hand, the tourism and hospitality industry is undergoing major structural changes, which include the demand for new forms of management. Companies need new approaches to management development for the challenges of the 21st century. As a response to these challenges there is a need for the rethinking of the current models and practice of university level management education.

Within this context, this paper aims to propose a general methodological framework for assuring quality in higher education for tourism and hospitality management. The framework is based on the principles of total quality management (TQM) and the process ap-
proach to quality management systems. In choosing formal quality assurance models, a combination of the TedQual certification system of the World Tourism Organization (WTO) and the international quality management standard ISO 9001:2000 is recommended.

2. TOTAL QUALITY MANAGEMENT IN HIGHER EDUCATION

Total quality management is a system that evolved in the manufacturing industries, but has today found its application in various service activities, one of them being education. This system is fully market oriented. It begins with the question “what does the customer want?” and ends with the answer “satisfied customer”. Today, quality is managed and the single goal is a job well done, because only a good product or service is worth paying for. The global market recognizes only the results of work. A job well done (the first time and each following time) is the essence of quality. It satisfies both the worker and the customer.

Total quality management is both a management approach of an organization centered on quality and a set of guiding principles that represent the foundation of a continually improving organization. The principle of continual improvement is best illustrated by examining how the Plan-Do-Check-Act (PDCA) cycle, often referred to as the Deming Cycle, can be used to manage the processes of the system.

Figure 1. Quality cycle

<table>
<thead>
<tr>
<th>PLAN</th>
<th>ACT</th>
<th>DO</th>
<th>CHECK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan – determine the goals and the process that are essential in achieving results in accordance with customer demands and institution policies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do – implement the process</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check – monitor and measure the processes and product in relation to the policies, aims and demands, against the product and report the results.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Act – undertake measures and activities for permanent process improvement.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
All quality management system processes can be managed by using the PDCA concept.

Total quality management is possible and useful in the educational system as well. All the rules of system quality apply and are adapted to the teaching process and the requirements of the students and teachers. Each of these levels and each phase of the development cycle of education requires different knowledge, capability and other managerial features, especially with regard to achieving total quality.

In the introduction of the book “Total Quality in Higher Education” (Ralph G. Lewis, Douglas H. Smith, 1994) the authors ask and answer the key question “Question: Why total quality in higher education? Answer: Because it is right. We believe that it is right because:

- It builds on the tradition of concern for quality that has characterized higher education in the United States and throughout the world.
- It recognizes the need for continuous development of the people who are part of the higher education system, whether students, faculty, or administrators.
- It involves principles applicable to institutional administration and classroom teaching, thus providing a bridge between traditionally separated parts of the system.
- It will help us meet the challenges of the 1990s and build effective universities and colleges of the twenty-first century”.

Teaching process elements are featured in Figure 2 and basic questions concerning the quality assessment of education are presented in Figure 3.

---

Figure 2. Input and output elements in the teaching process

![Diagram of teaching process elements]
If we consider the teaching process in which the curriculum is carried out to be the “academic production” of knowledge and knowledge transfer, then the input elements of this process are the student and their teachers, whereas the output elements are the results of the process, i.e. the knowledge and skills acquired by the student, as well as the research and published scientific and professional papers produced by the teachers. However, the connection between individual input and output elements can be twofold:

- **Students (consumers and users of knowledge) –** their expectations and needs determine the demand for certain knowledge. The curriculum offers knowledge, but also defines the demand – the number of enrolments and the share of student in a given group, and the quality of graduate and working students.

- **The teachers (who create and transfer knowledge) –** they carry the contents of the curriculum and define it. The teachers impact on defining the curriculum, and in turn the curriculum defines the number and structure of the teachers, their academic degree, and their teaching and professional experience.

- **The results of the teaching process are the professional knowledge and skills of the students that determine the survival and development of the curriculum.**

- **The scientific and professional papers published by teachers also determine the survival and the development of the curriculum.**

There is also a recurring connection between the input elements: students (their number and quality) determine the teachers (their number and quality) and vice versa. There is also a recurring connection between output elements – acquired student knowledge and skills determine the need for research and published papers by teachers, and vice versa they create the knowledge and skills of the students.

Quality management of the teaching process requires a definition of the frame of quality, i.e. the basic components of quality. These can be divided into three groups:

1. Components of input elements: student and teachers
2. Components of the quality of the teaching program
3. Components of output elements or results: knowledge and skills acquired by students (diplomas), research and papers published by teachers – researchers.

The purpose of such a model of quality is to enable the management of the total quality of the educational process and the continual improvement of the quality of this process.

The following questionnaire can be used as a basic model that contains all the features of quality management in higher education.
### QA Checkpoints for the University

<table>
<thead>
<tr>
<th>1. Motivating for quality consciousness</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Are the philosophy and general policies of the university and of top management easy to understand and have they been thoroughly implemented?</td>
</tr>
<tr>
<td>• Have employees been made aware of the damages the university suffers due to poorly prepared students and customer complaints (loss of customer confidence, loss of image, etc.)?</td>
</tr>
<tr>
<td>• Have concrete examples been provided to the staff to show the importance of quality as a shortcut to lower costs, higher student confidence, and a great sense of achievement?</td>
</tr>
<tr>
<td>• Have staff and students been helped to understand the role that quality plays in their work?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Objective and planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Are classroom quality targets clear and well understood?</td>
</tr>
<tr>
<td>• Has the QA improvement theme been clearly set forth?</td>
</tr>
<tr>
<td>• Has each individual and student been given instructions for his or her part in the plan for carrying out the improvement themes that will achieve these targets?</td>
</tr>
<tr>
<td>• Are the plans related to these targets and improvement themes clear?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Are chances for achieving the goals and plans being improved through education, exchanges with other universities, and participation in events outside the organization?</td>
</tr>
<tr>
<td>• Have the functions that make the offerings useful to the market and the current extent of the product's use in the market been explained?</td>
</tr>
<tr>
<td>• If a problem arises, does someone take charge, give proper instructions for solving the problem, and direct the improvement activities?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4. Practical work and its improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Are tasks related to the quality characteristics carried out thoroughly?</td>
</tr>
<tr>
<td>• Has a handbook been prepared to summarize work procedures in order to teach employees how to do their jobs?</td>
</tr>
<tr>
<td>• Have workers been taught how to use computers, instruments, and tools and to make revisions and adjustments to the curriculum?</td>
</tr>
<tr>
<td>• Are the work methods reviewed to determine that they are performed properly?</td>
</tr>
<tr>
<td>• Are workers encouraged to upgrade their technical knowledge and skills? How much time is spent each year per employee?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5. Problem solving and team activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• When problems or accidents occur, do workers receive guidance in solving the problem?</td>
</tr>
<tr>
<td>• When on-the-spot emergency fire fighting must be done, is the route cause of the problem identified in order to make sure it does not recur?</td>
</tr>
<tr>
<td>• Is the project team directed to work together to solve a problem?</td>
</tr>
<tr>
<td>• Are effective and rational problem-solving methods used, such as the seven quality control tools?</td>
</tr>
<tr>
<td>• If improvements and reforms are needed in organization, systems, or standards to prevent a problem from recurring, do the people directly involved participate in taking the necessary actions?</td>
</tr>
<tr>
<td>• Is careful consideration given to whether the university workplace culture is the problem, and are appropriate measures taken to change the situation?</td>
</tr>
</tbody>
</table>

3. PROCESS APPROACH TO QUALITY MANAGEMENT SYSTEMS IN HIGHER EDUCATION

Quality in the educational system can be defined as a set of interrelated elements and activities essential to the defining of strategies, policies and user demands by which goals and operational excellence are achieved. Quality in this sense implicitly includes the coordination, concentration and control of all the activities that both define and implement quality policy, goals and responsibilities within the framework of the educational system though planning, monitoring, securing and improving quality. Quality management is the task of all employees and management levels, with the particular responsibility of the senior management (i.e. the dean or principal).

To define educational quality let us first explain the meaning of quality: quality is a self-imposed higher level of operation and control over deviations and the meeting of user needs. It comprises all the features (properties) of products and services (entities) that make them capable of meeting the expressed (established) and assumed needs of the consumer. Quality is what the buyer expects. If quality is what the user/buyer expects, it follows that there are as many definitions of quality as there are users/buyers with different expectations (Avelini Holjevac, 1988).

“Entity” in an educational institution signifies the educational process whose end product is the knowledge and skills the graduate student possesses. There are a number of users whose needs should be met by this entity. Obviously, the primary users are the students themselves, i.e. the participants of the educational process. Those who finance this service also use it. These are usually the parents of the students, or the state. Important users are companies that will employ the graduates. Society as a whole can also be viewed as an end user, as education, in many theories, is considered one of the major factors of economic, political and generally sustainable development.

We can distinguish two aspects in the educational process: the quantitative and the qualitative aspect. The quantitative aspect is commonly displayed as indications of educational productivity (the ratio of enrolled and graduated students’ cost of studies per student, the average duration of studies and so on). The qualitative aspect of the educational process is apparent in the competencies and psychological transformations of students, as well as in the changes that education contributes to personal, economic and social development.

Generally speaking, there is an entire line of scientific disciplines, with pedagogy, andragogy, sociology, psychology and educational economics in particular, and, most recently, educology as a general educational and training science (Pastuović, 1999). None of them, however, takes the quality of the educational system into consideration. On the other hand, the quality system contradicts neither their perceptions nor legal regulations. The application of legal provisions and the appreciation of scientific perceptions are obligatory, while the implementation of ISO standards and the quality system is voluntary. Nevertheless, the application of the quality system is highly favored, since it represents a managerial tool for management efficiency. It binds the organization structure to the processes, the procedures and the other means and resources that prove essential in allowing the entity (the educational process) to fulfil the user’s demands in terms of quality and satisfaction.

Figure 4 illustrates the process as a system of mutually connected resources and activities that transform inputs into outputs. The process approach model is a conceptual depiction of the general system of quality management. The model assumes that the interested parties play an important role in the process of defining demands. Measuring customer
satisfaction serves as feedback for evaluating whether the demands and expectation of the customers have been met (Vujić, 1996).

Customers express their demands, requests and needs, which are regarded as inputs in the process. Simultaneously, a specification of products and services is drawn up and resources are procured – material and financial funds, equipment, instructions, knowledge and skills, personnel, hardware and software support, measuring and test equipment for monitoring the process.

Successful management of resources presents a special category of the process. Procedures, measurements, analysis and improvements of products, processes and results form an integral part of the business system. Personnel management is the influence on the attitude and behavior of individuals, as well as the interaction within and between groups in order to achieve certain goals.

Figure 4. Model of a process-based quality management system

Source: ISO (2001)
Process management is present only if:

- The process includes at least two people
- Alternating conditional behavior and social interaction can be observed
- The management is efficient and the persons being managed accept the orders of the management and the managers
- Management is oriented towards achieving the planned goals
- The management process promotes the development of human potentials.

4. THE METHODOLOGICAL FRAMEWORK FOR ASSURING QUALITY IN TOURISM AND HOSPITALITY MANAGEMENT EDUCATION

The development of human potential in tourism assumes a dominant position. Only through the development of human potential in tourism can we expect to create new values and become competitive in modern global business conditions. The level of quality in global terms and relations has become a key factor in differentiating and choosing business partners and individuals. In this context, the issue of increased investment in the education and training of tourist personnel is raised, as well as the issue of achieving quality and transparent educational programs.

The only way to determine the quality of education is by measuring the results obtained against the goals set forth. The basic aims of higher education in general, and education in tourist and hospitality management, are:

- A contribution to economic growth
- A contribution to the development of democracy and culture
- The improvement of the quality of human potentials.

The aims stated show that the training of managers impacts on all of the main guidelines of national development. The development trends of educating tourism personnel are reflected in the WTO/TEDQUAL certification systems for educational programs in tourism, as well as in the European University Conventions: Magna Charta Universitatum (1988), The Common Declaration on the Harmonized Structure of Higher Education (1988), and the Bologna Declaration (1999) that was accepted by the Republic of Croatia, as a co-signatory in May of 2001.

The methodological framework we propose for achieving quality in education and training, especially for tourism and hospitality managers, is based on the requirements of a series of ISO 9000 standards and WTO Human Resource Development Program requirements. These requirements are based on establishing a quality system that will enable the coordination of educational programs with the real needs for developing human potential in the tourism industry.

TEDQUAL is a methodology and a certification system for assuring quality in education and training for tourism. This system sets world standards for quality education in tourism and hospitality. TEDQUAL involves the concept of creating quality in the education of tourism personnel, and it primarily pertains to the quality of the faculty program, the quality of personnel and education, management and infrastructure, as well as the relations between society and the tourist industry (WTO, 1997).
The basic processes and sub-processes included in the TEDQUAL system are featured in Figure 5.

**Figure 5. Processes and Sub-processes in the TEDQUAL System**

<table>
<thead>
<tr>
<th>Processes</th>
<th>Sub-processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees (in society and the industries)</td>
<td>Strategy, aim and plans of action of hotel and tourism enterprises</td>
</tr>
<tr>
<td>Students</td>
<td>Financial and administrative procedures, acceptable to students, evaluation of student knowledge and skills.</td>
</tr>
<tr>
<td>The Teaching System</td>
<td>Program contents, presentation methodology, pedagogical infrastructure</td>
</tr>
<tr>
<td>The Teaching Staff</td>
<td>Choosing the teaching staff, continuous education and improvement, research and development</td>
</tr>
<tr>
<td>The Infrastructure</td>
<td>The external environment, working conditions, information technology systems and equipment and their maintenance.</td>
</tr>
<tr>
<td>The Management</td>
<td>The system of establishing cooperation and managing the relations and activities of the educational process and the activities of the educational institution.</td>
</tr>
</tbody>
</table>

Source: WTO, TedQual Certification System

As shown in Figure 5, the processes are divided into sub-processes. These are further divided into procedures and instructions, i.e. into specific tasks of carrying out the activities stated. The TEDQUAL system is further based on three more key factors. These are: quality standards, assessment and certification.

**Quality standards** are the results that should be obtained in each process, sub-process and procedure, and as such they comprise the total output of tourist educational programs and present the purpose of analysis.

**Quality assessment** is an independent survey undertaken to determine whether the fields of activity and the results are proportional to the criteria set down, and whether these activities are efficient enough and adequate enough to meet the purpose.

**The Certificate** is awarded by the authorized certification institution upon auditing carried out by an authorized auditor.

Special importance in establishing the quality system in higher education institutions is given to the ISO 9001:2000 standard which encourages the use of the process approach in the development, implementation and improvement of the efficiency of the quality management system, and in increasing the satisfaction of the customer. In addition to determining the policies and goals of quality, the ISO 9001:2000 standard involves the following:

- Customer orientation.
- Endeavors to apply adequate processes that will result in satisfied customers and achieving the aims of quality.
- Implementation and maintenance of the quality management system in order to reach the planned goals.
- Securing the necessary resources.
• Comparing results obtained against the goals set forth.
• Deciding on action pertaining to quality policies and aims.
• Deciding upon improvement activities.

The question arises of whether and how the principles of quality management and ISO 9000 standards can be applied to educational institutions. At first glance, it seems impossible to connect expressions such as “satisfied customer”, “contract review”, “purchasing”, “storage”, etc, to an educational sector signified by elitism and tradition that bring in their wake social prestige, a rigid hierarchy and a tendency to adapt only with difficulty to social and structural changes.

Research undertaken by the international academic community with regard to quality management in higher education has progressed in two directions. On the one hand, certain authors (e.g. Clery, 1993) believe that ISO 9000 can and should be applied to all levels of the educational system. On the other hand, authors such as Jiménez and Swart feel that through the direct implementation of the ISO 9000 standards only minimum demands can be met, which is to a great extent out of line with the perpetual aspirations of achieving the highest possible success in all spheres of academic life (Jiménez et al., 1994).

In this paper we support the view that a combination of the TEDQUAL methodology and the process approach to quality management systems of the international standard ISO 9000 is a promising mechanism for assuring quality and standards in higher education for tourism and hospitality management.

5. INTERNATIONAL COMPARATIVE ANALYSIS OF CURRICULUM STRUCTURES IN HIGHER EDUCATION FOR TOURISM AND HOSPITALITY MANAGEMENT

Internationalization and quality of higher education have always been closely linked (Campbell and Van der Wende, 2001). In a globalized higher education context it is increasingly important that quality and standards meet international expectations (Sharma and Roy, 1996). Recently, numerous authors have come to the conclusion that globalization is what it is all about and that the curriculum of a higher education institution should be transparent and comparable with that of similar institutions worldwide.

For the purposes of this study, a comparative analysis of the higher education system for tourism and hospitality managers was done with the focus on the curriculum structure. By using the isolation method, a thorough analysis was made of only one basic component of quality and that is the design quality or curriculum of the Croatian model of the Faculty of Tourism and Hospitality Management in Opatija and selected models of world educational leaders in the same field of education, which will serve as a benchmark in the analysis. The comparative analysis is focused on a survey of the subjects taught in four-year programs in 8 universities from Australia, the States and Europe. The purpose of the analysis was to determine the similarities and differences in the curriculum structure of the top universities in the world that teach tourism and hospitality management and to evaluate the compatibility of the Croatian model.

The universities that were chosen are:
1. LA TROBE UNIVERSITY, Faculty of Law and Management, School of Tourism and Hospitality, Bundoora Metropolitan Campus, Plenty Road, Bundoora Vic, AUSTRALIA
2. FLORIDA INTERNATIONAL UNIVERSITY, MIAMI, School of Hospitality Management, Broward County Programs, Davie Florida, Florida, USA
3. CORNEL UNIVERSITY, Cornell School of Hotel Administration, Ithaca, New York, USA
4. UNLV - UNIVERSITY OF NEVADA LAS VEGAS, William F. Harrah College of Hotel Administration, Las Vegas, Nevada, USA
5. CEMHI - CENTRE EUROPEEN DE MANAGEMENT HOTELIER INTERNATIONAL, Paris, FRANCE
6. IMI - INTERNATIONAL HOTEL MANAGEMENT INSTITUTE LUCERNE/SWITZERLAND, Kastanienbaum, SWITZERLAND
7. THE MANCHESTER METROPOLITAN UNIVERSITY, Holling Faculty, Manchester, UNITED KINGDOM
8. TEI - TECHNOLOGICAL EDUCATIONAL INSTITUTE OF LARISSA, Larissa, GREECE
9. UNIVERSITY OF RIJEKA, FACULTY OF TOURISM AND HOSPITALITY MANAGEMENT, Opatija, CROATIA

The names of the universities tell us that some are more oriented to the education of hospitality managers and others to the education of tourism managers. This is reflected in their respective curricula.

In-depth analyses of the contents of the curricula of the 9 similar universities that educate tourism and hospitality managers show the following:

- There are a total of 360 obligatory and 50 elective courses in all the universities stated.
- When the courses are synthesized per fields of study, the above large number of courses can be condensed into 24 obligatory courses and 10 elective courses that are taught in all the universities (under various similar titles). These are:
  Obligatory courses: economics, law, statistics, mathematics, information technology, research methods, geography, sociology, psychology, foreign languages, accounting, finance, management, food and services management, marketing, controlling, communications, strategy and planning, personnel management, organization, technology and maintenance, culture and leisure time, tourism and the environment.
  Elective courses: transport, design, eco-tourism, small and medium enterprises, casinos, ethics, personnel development, health and hygiene, entrepreneurship, cultural heritage
- All obligatory and elective courses are taught as at the other universities, under similar names
- The difference is in the number of courses in a given area, for example marketing and law are taught in-depth in some universities (over more years)
- In the Croatian example, more foreign languages are taught (as many as 4) than in the other universities stated;
• There are differences in the curriculum of the universities related to the years of study

• The number of courses in a given year also differs among the various universities.

The analysis shows that the curriculum structure demonstrates common characteristics and that the program of the Faculty of Tourism and Hospitality Management Opatija is fully compatible with the common structure.

One related question awaits careful investigation: How relevant is the existing tourism and hospitality management curricula to the industry’s real needs? The pilot study on current and future education needs in the tourism industry, conducted by The George Washington University for the World Tourism Organization, has revealed major gaps between the output of the tourism education and training system and the real demand of tourism employers (WTO, 1997). The study also suggests that if we are to apply a Total Quality approach we must first and foremost define the procedures by which we can determine the needs and expectations of employers, professionals and other tourism education and training users.

6. CONCLUSION

Higher education institutions need to respond to the requirements created by a new environment characterized by the globalization of the marketplace and the emergence of knowledge-based economies and societies. Major structural changes within tourism and hospitality industries have brought a need for new forms of management and new managerial skills. Tourism and hospitality industries are a part of the global economic system. The tourism product is created and offered on the global marketplace. The education of tourism and hospitality managers must meet the demand for knowledge made by the world tourism market. This determines the need to define and embrace a unique frame and unique educational standards for tourism and hospitality managers throughout the world. These managers should be trained to manage efficiently tourism and hotel enterprises around the world. This paper argues that tourism and hospitality management higher education institutions must rethink the structure of their curricula as well as teaching processes and methods in order to respond to the changing nature of managerial work and to improve job prospects of students.

In the globalized higher education context it is increasingly important that quality and standards meet international expectations. The paper addresses the question of how the concepts of Total Quality Management (TQM) and the international standard for quality management ISO 9000 can best be applied to higher education institutions for tourism and hospitality management. A general methodological framework for quality assurance has been proposed and a combination of the TedQual certification system and the international standard ISO 9001:2000 is recommended.

To conclude, it is considered that higher education institutions for tourism and hospitality management that lack strategies for the implementation of quality assurance systems based on international standards will be at serious disadvantage in the years to come.
REFERENCES


The Bologna Declaration, (1999), The European higher education area, Joint Declaration of the European Ministers of Education Convened in Bologna.


A total quality approach for excellence in tertiary tourism education: the TEEQ model

Evangelos Christou*, Higher Technological Educational Institute of Thessaloniki, Greece

Abstract

This paper suggests that in tertiary tourism education in the 21st century, a strategy utilized by a large number of organizations for effective change and sustained competitive advantage is TQM. The paper aims to determine the advantages of TQM and how TQM can be applied effectively and efficiently in tertiary education institutions providing tourism management programs of study. A tertiary tourism management education excellence model (TEEQ) is being developed, based on fundamental concepts of service quality: 5S, marketing and education quality control, quality control circles, ISO9000 and total preventive maintenance. In addition, the paper acknowledges the diversity of customers that TQM must satisfy and highlights some of the problems encountered in implementing the model, based on secondary research and experience of the author. Finally, an implementation plan is being suggested for educational establishments to work towards TEEQ. However, further research is required for validating the model internationally and for establishing it as a unique approach for TQM in tertiary tourism education.

Keywords: Tertiary tourism education, total quality management, educational quality, tourism education excellence model.

* Evangelos Christou, Department of Tourism Management, Technological Educational Institute of Thessaloniki, 17 Athanasiou Soulioti, GR-54642, Thessaloniki, Greece. Tel./Fax: +30-310-817336. E-mail: christou@tour.teithe.gr
1. Introduction

Like any other profit or non-profit sector, tertiary tourism education needs quality. Total Quality Management (TQM) is a way of managing to improve the effectiveness, efficiency, cohesiveness, flexibility, and competitiveness of an organisation as a whole. As defined by ISO 9004 (BSI, 1993), TQM is a management philosophy and practices, which aim to harness the human and material resources of an organisation in the most effective way to achieve the objectives of the organisation.

Some researchers are sceptical of the idea of applying TQM to tertiary education institutions (TEIs). For instance, Chaston (1994, p. 114) has identified obstacles, which include insufficient trust between departments and low confidence in the ability to manage the process: “Under these circumstances, it does not appear that, for the foreseeable future, universities are in a position to adopt TQM philosophy”. Paradoxically, however, TEIs, which research and teach TQM lack credibility if they decline to embrace TQM philosophy and practices themselves. This article determines the most effective and systematic way to introduce TQM to TEIs, particularly those offering tourism programs of study, and builds on existing partial TQM practices.

Because TQM is universal and proven by many successful firms, it should be used to formulate the mission statement for the services provided by tourism educational establishments; a generic mission statement could be: “To provide quality tourism education, research and related services to continuously satisfy stakeholders’ needs and achieve excellence through TQM”. One main objective of TEIs should be to unlock the creativity of academic staff to find ways of increasing productivity while enhancing quality on declining resources. Fundamentally, tourism departments, schools, or faculties must live within their means, with cross-subsidisation only allowed for explicit strategic purposes.

Based on the above, a tertiary tourism education TQM model, the TEEQ model (Tourism Education Excellence & Quality model) is conceptually developed by the author. The innovative TEEQ model can form the basis for services provided by tertiary tourism education institutions of the 21st century. TEEQ provides a step-by-step improvement opportunity for TEIs, which are committed to improving stakeholder satisfaction through TQM. This is a gradual, ongoing, long-term rather than an immediate process, but worth the effort, resulting in sustained competitiveness. Satisfying the stakeholders in tourism education is a continuous process because their requirements change over time. Thus, the desirable way to achieve total stakeholder satisfaction is through continuous improvement via the TEEQ model. Based on this discussion, TEIs can embrace TEEQ through a programme of training and implementation. The TEEQ training and implementation programme can be termed total quality program in education (TQPE) for an educational organisation and it is a unique approach for educational establishments to implement TQM.

2. In search of the TQM approach

For TQM, there are a number of well-known quality definitions: “the totality of features and characteristics of a product or service that bears on its ability to meet a stated or implied need”; “conformance to requirement” (Crosby, 1979, p. 34); and “fitness for use”. TQM has been defined in a variety of ways by various authors. It generally means a quest for excellence, creating the right attitudes and controls to make prevention of defects and
errors possible and optimise customer satisfaction by increased efficiency and effectiveness. TQM has been defined by Oakland (1993, p. ix) as “...a way of managing the whole business process to ensure complete customer satisfaction at every stage, internally and externally”. TEIs need to satisfy several customers, the students being the main, but certainly not the only customer. Tobin (1990, p. 11) defines TQM as “the totally integrated effort for gaining competitive advantage by continuously improving every facet of organizational culture”. Feigenbaum (1991, p. 31) defines TQM as the “total quality control’s organization-wide impact”. Wilkinson and Witcher’s (1991, p. 48) definition is arguably the most comprehensive:

- Total: every person in the firm is involved (including customers and suppliers);
- Quality: customer requirements are met exactly;
- Management: senior executives are fully committed.

TQM has been an organisation-wide activity and has to reach every employee within the organisation. TQM has also been considered as a combination of various processes representing the dynamic behaviour of an organisation. For this, an organisation is referred to as a socio-technological system, where the activities carried out are geared towards the customer requirements with efficiency and effectiveness in mind, and where the health of the enterprise is considered by measuring costs and returns at each stage of the business cycle.

The methods of TQM have been based on the quest for progress and continual improvement in the areas of cost, reliability, quality, innovation, and efficiency and business effectiveness. TQM has been an approach for continuously improving the quality of goods and services delivered through the participation at all levels and functions of the organisation. Organisations have viewed TQM as the totally integrated efforts of all organisational members aimed at gaining competitive advantage by continuously improving every facet of the organisational culture. To highlight the importance of TQM, Mohanty (1995, p. 66) has stated, “...there has probably never been a time in our industrial development history when members, managers, and students of our contemporary organisations are so united on the importance of TQM”. He has explained TQM as a revolution of the generic management philosophy. For an in-depth understanding of the various aspects of TQM and its applicability, one may refer to Lakhe and Mohanty (1994).

According to the principles of the TQM concept, three basic assumptions have to be met by any quality-driven tourism organisation (Camison, 1996):

1. Everyone associated with the management and production system inside the organisation has to be involved in continuous improvement.
2. The customers’ expressed and implied needs have to be met fully by the organisation in question.
3. The executives or higher managerial team of the organisation have to be fully committed to the quality efforts.
3. The way TQM was implemented in education

Like the varied range of rationales, the way TQM was introduced by the various organisations appears to be varied. Generally, two approaches (Christou et al., 1999) can be identified in implementing TQM in educational institutions:

1. The “academic” approach wherein emphasis is more focused on the teaching/learning outcomes resulting from the implementation of TQM.

2. The “strategic” approach where a globally strategic perspective is taken, so that both academic and administrative areas are included in the implementation of TQM.

Within the above categories, the breadth of application gives a third dimension. In addition application of TQM can be as narrow as one department within an educational institution or as wide as the whole institution. For example, an Arizona high school implemented an aspect of TQM (namely the statistical process control) to monitor students’ attendance/absences using real data and proper analysis. This led to the Principal of the school and staff understanding more of the processes involved and has reduced “the rework at our school from 10 per cent to 6 per cent. This gives us additional time to focus on education” (Walker and Walker, 1993).

Howard Community College in Columbia, Maryland, USA concentrated on improving student learning (Carlson et al., 1993) through a new approach to assessment, using TQM. That is, by being customer focused, management led, employee empowered, data driven and continuously improved, Howard Community College looked at what they called the missing educational application, namely, teaching and learning. On a “global strategic” approach, the Lisarow High School in New South Wales, Australia (Paine, 1993), started with awareness of the concept throughout the school by way of regular information briefings, distribution of literature, visiting local industries which have introduced TQM and trialling aspects of TQM in the classroom. Recognition of the differences between manufacturing industry and educational institutions was brought out in the open, followed by conscious training of the teachers in TQM concepts and practices. Importantly the Principal of the school is the driving force behind the move. This obviously alleviated quite a number of problems regarding top management commitment, leadership and the like.

A review (Marchese, 1993) showed that eight out of ten institutions in the USA have now embarked on TQM implementation. The average time of implementation to date is about two years, although almost all of those surveyed stated that they were just beginning the process. Without exception, they consider the implementation of TQM as a long process and recognize that it must impact on the culture of the organization in order to achieve the outcomes. This view is supported by others (Glover, 1993; Mink et al., 1993; Taylor and Hill, 1993). While the above appears to emulate the introduction and implementation of TQM in industry, through the creation of teams and the hierarchical implementation, Otago Polytechnic in New Zealand is experimenting with a novel approach. It started with a institute-wide awareness programme conducted by the Chief Executive Officer in the form of seminars run on average twice a week in the first year and administered by the staff development office. Two major sessions were run, comprising an introductory seminar defining quality and other concepts, followed by a second stage which discussed, in a preliminary way, the methods and procedures of TQM, but without going into how these can be used in implementing TQM in an educational institution. In the second year, the staff development office took over the implementation by introducing a special course entitled Certificate in Quality Education developed in the normal manner through the Academic
Board and Courses Committee, in which three major programmes are offered to staff at different levels, e.g. one level caters for the senior management (although not limited to them only), another to support staff and the third to administrative staff. Each level has modules, which can be taken over two years on a part-time basis, at the end of which attendance and successful assessment will be rewarded with a Certificate in Quality Education. Each module will have a workplace assignment, which basically links the theory to the practice in the familiar environment of the staff. The fact that management is not making these compulsory to staff will solicit total commitment by those staff that enrolled and participated. Through the performance appraisal system, which exists within Otago Polytechnic, it is also expected that staff and their immediate supervisors will be able to identify the needs to attend these modules. In time it is expected that all staff will attend the modules and will all qualify for the Certificate in Quality Education.

3. Problems faced in implementing TQM in education

It has been said that university is the last outpost of Taylorism, a testament to the entrenched view about reductionism. Given that scientific research is indeed reductionist in nature, it is not surprising if tertiary educational institutions are “hooked” on reductionism or Taylorism. This is obviously one major obstacle, which has to be addressed by implementers of TQM in educational institutions. Experience indeed shows that, even if excellent progress was made in the non-academic areas of an educational institution, there is no guarantee that the academic areas will follow suit (Idrus, 1991).

The definition of customers and the ability of the customers to influence contents of the courses has been queried. There appears to be, in fact, a feeling of self-sufficiency among professors and academic teachers leading to the belief that there is no need to even think about the customers. Students as customers, after all, lack the wisdom and knowledge to influence the contents of the courses. What follows from this, is the belief also that students are therefore unable to take responsibility for their own learning.

Clarity of purpose of educational institutions has never been so far an issue that has to be addressed (Kells, 1995). Even if some statement of purpose is available, there is a confused sense of priority. The adoption of the industry sense of TQM, i.e. production-processes-centred, causes a lot of problems in the educational setting. The somewhat complex delegation and decision-making process in an educational setting creates another problem. In addition, academics, of course, see themselves as being special people. Some-times the very reason, which gained them employment as an academic, is indeed the characteristic that poses problems in the implementation of TQM, e.g. an individualistic, reductionist attitude. It is also true that tertiary educational institutions appear to have failed in assessing themselves in terms of performance indicators. It is only of late, and after governments requested performance indicators, that tertiary educational institutions started to look at how well or badly they perform (Spanbauer, 1995; Thune, 1993; Zink and Schmidt, 1995).

3.2. Benefits of implementing TQM in tertiary educational institutions

Given that there is agreement on the long-term aspect of TQM implementation and that educational institutions have only recently embarked on such endeavour, it is not strange that accrued benefits are difficult to enumerate at this time. It must also be remembered that overall benefits observed in any of these cases will in reality be difficult to assign to particular causes, as other sources of improvements normally result from the consideration and implementation of one cause. Fox Valley Technical College (Spanbauer, 1995), which had
eight years of experience in this area, is probably the best example to take in terms of the benefits accrued. In addition to increased placement rates, fewer dropouts, increased enrolment, increased employee satisfaction, greater accountability, better customer service and reduced overall costs of operation, it has also implemented a money back guarantee on its programmes, a guarantee to employers that their graduates will have quality and productivity skills as well as technical competences. Free instruction is available to those who could not get jobs at the end of their first training with the college. The college has also begun teaching quality to all its students in every programme they run.

As application straddles a spectrum ranging from a single department and academic in nature to institution-wide across several departments and disciplines, results are therefore also varied according to the areas of application. Howard Community College (Carlson et al., 1993), which has collected data from as early as 1980, is able to show the improvement year by year. Items include graduates’ goal achievement, long term success rates, employment in field, continuing education goal achievement, transfer preparation, employment preparation, student course satisfaction (in both traditional courses and continuing education). Students’ evaluation of academic staff, quality of instructions and academic staff participation in teaching improvement activities are some of the other activities which are measured. Because these become measurable items, improvements when and if needed can be planned for. As can be expected, some scores are below target and in others exceeded.

At the University of Maryland’s College Park campus in the U.S.A., real empowerment has resulted from the application of TQM in the management information system’s class. The use of the feedback metre, an unobtrusive addition to software used in the classroom to indicate whether the student understood the module or not (Seymour, 1993), is now widely used at the university. In other cases (Nagy et al., 1993) benefits, which have accrued, include the elimination of unnecessary procedures and work. In addition to the above (Schargel, 1993), Parents Teachers Association membership has grown, more than $1 million has been raised to run new and additional programmes, scholarships have been offered by banks and companies, and there has been a reduction in and some-times elimination of teacher union grievances. At Babson College (an MBA school in Massachusetts, U.S.A.), the customer focus had led the college to scrap an entire MBA programme and replace it with one which is far more advanced and long-term focused than the one scrapped (Paton, 1993). Generally, however, processes/systems and the way people work together and with each other have changed for the better in all tertiary educational establishments that have applied TQM.

4. TQM and service quality principles in TEIs & tourism programs

One very significant impact of educational principles is change of focus from teaching to action learning. Maria Montessori (Pascale and Athos, 1981) has pointed out that the traditional curriculum design is aiming at reducing the burden of teaching but restricting the content. This problem, however, can be solved effectively by adopting an action learning approach (Revans, 1983). Some of Montessori’s research findings are important for achieving TQM in tertiary education. Examples are: modelling is better than words, demonstration is better than explanation, minimize instructions, and positive reinforcement is more effective than punishment. These themes can be built into curriculum design and teaching methodology. All academic, research, administrative and support staff should be encouraged to adopt this approach as and when feasible.
Tourism-oriented TEIs (or Departments, Schools and Faculties of tourism), same as all other educational establishments, are accountable for the academic quality of teaching programmes. Hence, specification of teaching services is an essential base from which to assess academic quality objectively. This may be achieved through the introduction of teaching and learning plans, to provide a detailed service specification for every module offered. The objective of teaching and learning plans is to design and manage teaching operations to maximize effectiveness and efficiency while maintaining quality and flexibility (Sigala, 2001).

Service specification forms an integral part of the SERVQUAL conceptual model of service quality to measure tangible and intangible service elements advocated by Parasuraman et al. (1990). This model investigates discrepancies or “gaps” to highlight target areas where quality may be improved. Examples for tertiary tourism education for the five gaps are given as follows:

- **Gap 1**: Customers’ expectations and management’s perceptions of customers’ expectations. An example of this gap is on courses requiring hands-on experience, such as computing and food and beverage management, where students may, erroneously, expect a greater emphasis on practical and technical study at the expense of academic rigour.

- **Gap 2**: Management’s perceptions of customers’ expectations and service quality specifications. Students’ ignorance and employers’ particular focus may bias or limit their expectations. As experienced professionals, academic staff should have a major role in designing and determining the format of the modules and courses which they deliver. In many instances, such a gap may be desirable.

- **Gap 3**: Service quality specifications and service delivery. In a modular system, it is not uncommon for a module designed by one academic to be taught by other academic staff members who may apply personal interpretation or focus of expertise to delivery of the specification. On the other hand, continuous improvement, as a new module is refined with experience, should be encouraged, with the specification regularly reviewed.

- **Gap 4**: Service delivery and external communications to customers. Standardised comprehensive, two-way informal and formal feedback systems are necessary to recognize and minimize any such gap occurring.

- **Gap 5**: Customers’ expectations and perceived service. For instance, students who utilize laboratory and workshop facilities in periods of peak demand may perceive that facilities are inadequately resourced whereas, in reality, facilities might be operating at, say, 50 per cent capacity over the working week.

Additionally, TEIs that offer tourism programs have a multiplicity of customer expectations and perceptions to consider. Teaching and learning plans could form the basis of quality specification using Parasuraman et al.’s (1990) conceptual model. Teaching and learning plans for each individual module would specify the aims and objects, purpose, credit value and module level, weekly syllabus, delivery format, assessment format and reading list. The benefits of service specification are wide-reaching, and of significant use to all stakeholders:
1. **Students:** As the main customer of the service, students receive the following benefits:
   - Specification provides a detailed breakdown of the aims and objectives, syllabus, reading list and assessment format of the module.
   - Assessment of student performance in non-quantifiable modules has objective criteria against which to measure student performance.
   - Students know what to expect of the service and can objectively perceive whether the service has been delivered in accordance with the specification.
   - If students desire, parents may be more fully informed.
   - If students desire, employers may be more fully informed.

2. **Employers of graduates:** TEIs should keep employers fully informed about their approach to teaching and learning, particularly the way students are taught transferable skills in tourism management.

3. **Government bodies:** Government bodies are major purchasers of the services of TEIs, to which TEIs are accountable. Specification could increase the objectivity of the TEIs academic quality assessment audits, a function that is usually performed by entitled government bodies.

4. **Exchange TEIs:** Specification can confirm whether particular modules are equivalent substitute study for exchange students. This can be further strengthened through participation in the European Credit Transfer Scheme (ECTS).

5. **Academic staff:** Specification can be used as a basis for determining teaching workload. Course leaders and heads of departments can have a clearer insight and constructive input into courses for which they are responsible.

6. **Management and administration:** Specification allows more accurate costing and hence can determine whether modules are feasible. An unfeasible module may be redrafted, knowingly subsidized, attract a supplement from the student or be subjected to “what if” computer-costing modelling.

7. **Professional bodies and other educational institutions:** Specification will assist in determining whether exemptions for further courses are appropriate.

---

5. **A holistic approach for TQM in tertiary tourism education**

   Based on the above, a tertiary tourism education TQM model, the TEEQ model (Tourism Education Excellence & Quality model) is conceptually developed. The innovative TEEQ model can form the basis for services provided by tertiary education institutions of the 21st century. TEEQ provides a step-by-step improvement opportunity for TEIs, which are committed to improving stakeholder satisfaction through TQM. This is a gradual, ongoing, long-term rather than an immediate process. Satisfying the stakeholders in tourism education is a continuous process because their requirements change over time. Thus, the desirable way to achieve total stakeholder satisfaction is through continuous improvement via the TEEQ model. Based on this discussion, TEIs can embrace TEEQ through a programme of training and implementation.
The proposed Tourism Education Excellence & Quality model (figure 1) incorporates seven consequent steps that a TEI has to take in order to implement successfully the core principles of total quality management. Each step builds upon the previous one, and prepares the ground for the implementation of the next step:

1. The SERVQUAL conceptual model of service quality can be used as the starting point for measuring the tangible and intangible service elements of the TEI, and for investigating discrepancies or “gaps” to highlight target areas where quality may be improved.

2. Based on the SERVQUAL analysis, Service Specification Forms will be developed and analytical Teaching and Learning Plans for each individual module would be created,
specifying the aims and objects, purpose, credit value and module level, weekly syllabus, delivery format, assessment format and reading list.

3. The five Ss or "components for excellence" (Osada, 1991) will be incorporated in the TEI's organisation. The five Ss, who are related to all the activities of the TEI's human resources, are: Seiri (meaning structurise and organise all procedures), Seiton (meaning systemise neatly all activities), Seiso (meaning maintaining a clean working environment), Seiketsu (meaning standardise all tasks) and Shitsuke (meaning having self-discipline). The five Ss can help in everything the TEI's human resources do by ensuring a total quality working environment. These are basic activities that everyone (both academic and non-academic staff) should be doing in order to have a total quality environment at their workplace.

4. Adoption of Quality Control Circles (QCC). A QCC (Ishikawa, 1984) is a small group, which voluntarily performs quality control activities within a single workplace. Moreover, this small group is an ongoing organisation within company-wide, quality control activities, for mutual self-development and process control. The group is also charged to improve its workplace, utilising quality control techniques, with full participation of all members. The basic concepts behind QCC activities within the TEI's quality control effort are to contribute to continuous improvement and development of the educational establishment; to respect humanity, and to enhance personal and job satisfaction; and to give fullest rein to human capabilities and draw out each individual’s infinite potential. For example, QCC can be set up to design and improve courses and methods of assessment, to determine how research can be incorporated in the curriculum, and to share best teaching practices.

5. Implementation of the ISO 9000 series. The ISO 9000 series are quality systems standards that guide an organisation's performance of specified requirements in the areas of design, development, production, installation and service. The International Standards Organisation awards the ISO 9000 series certificates and they are aimed at certifying a quality assurance management system by focusing on twenty key requirements (Eckstein & Balakrishnan, 1993). The ISO 9000 series of quality system management standards can practically be used as a platform for achieving TQM; it is considered to be a “stepping stone” en route to TQM (Williams, 1997). The certification of an educational establishment for the ISO 9000 quality assurance standard is considered to provide a number of benefits, usually in terms of improved productivity, cost reduction, guaranteed quality of service and reduced customer complaints (Christou, 1999; Nield & Kozak, 1999; Christou & Eaton, 2000).

6. Adoption of a Total Preventive Maintenance (TPM) system. Total preventive maintenance (Senju, 1992) is a system of maintenance covering the entire life of equipment in every division, including planning, operations and maintenance, involving everyone from top executives to frontline employees, promoting productive maintenance through morale-building management and small-group activities in an effort to maximize equipment efficiency. In tourism TEI, essential equipment such as computers, food and beverage laboratory equipment and demonstration units require regular maintenance in order to provide services as and when needed. The condition of this equipment has a direct impact on the quality and productivity of teaching and instruction sessions.

7. Organisation-wide adoption of TQM principles. Attention to the following TQM principles is the main guarantee for successful implementation of TQM. They are leadership, commitment, total customer satisfaction, continuous improvement, total involvement,
training and education, ownership of problems, reward and recognition, error prevention, and team-work. Special attention must be given to the case where some employees may acknowledge TQM philosophy but fail to contribute individually because they do not know what is required or are not motivated to participate. This is particularly acute in TEIs where academic staff are expected to analyse, challenge, criticize and substantiate evidence. So, in order to implement TQM effectively, it is important to ensure that everyone is fully involved in and committed to the process.

6. Conclusions

Based on the proposed model, tourism TEIs or relevant faculties can embrace TEEQ through a programme of training and implementation. The TEEQ training and implementation programme is a unique approach for TEIs, to achieve excellence through TQM. Where certain TEIs have covered some stages of the TEEQ model, they can tailor the programme to suit their own needs. In order to implement the above objective successfully, the process is as follows:

- obtain top management commitment: most important of all establish implementation teams, including a quality steering committee and quality improvement teams;
- assess the current quality system situation to identify all the existing good practices;
- create a documented implementation plan, as good project management is essential;
- provide training so that human resources are fully aware of the changes;
- create and update quality management documentation (i.e. ISO 9000 or equivalent);
- monitor progress as part of the Deming cycle (plan-do-check-act).

This paper demonstrates the advantages of TQM and how TQM can be effectively and efficiently applied in educational establishments, as illustrated by the tourism education excellence & quality model (TEEQ), based on fundamental concepts of service quality. Most educational institutions concentrate exclusively on students (and perhaps employers) as stakeholders but neglect the diversity of "customers", which TQM must satisfy. It also suggests commitment from everyone, competence and continuous improvement in implementing TQM. TEEQ is based on contemporary definitions and perceptions of quality in general and tourism service quality in particular. An implementation plan is being suggested for educational establishments to work towards TEEQ. However, further research is required for validating the model internationally and for establishing it as a unique approach for TQM in tertiary tourism education.

References


The development of constructs for the evaluation of academics teaching tourism: an exploratory study using Q-Methodology

Dimitrios Stergiou, University of Surrey
David Airey, University of Surrey
Michael Riley, University of Surrey

Abstract

After about three decades of development tourism has now become established as a very popular subject for study at all levels in the UK and internationally. Alongside the establishment of tourism as a worthy area of study there has also been a corresponding expansion of academic articles and texts on the subject of tourism education. However, a realistic view of this literature may be that whilst it demonstrates considerable progress, it still has not been concerned with the issue of teaching evaluation. Against this background, this paper summarises the approach and main findings of a preliminary study undertaken in order to identify common dimensions by which vocational education teachers are evaluated and common perceptions as to the knowledge base of tourism academics. The method applied is Q-methodology, a technique that can be used to gain important insights on individuals’ judgements, attitudes and points of view on topics or situations that involve subjectivity. The output of the study is a preliminary set of statements that may form the basis of scaling in a later phase of the research. The findings are presented in a way that promotes discussion on the development of constructs for the evaluation of academics teaching tourism. The study is very much a pioneering work in this field and focuses particularly on higher education for the tourism sector in the UK.

Keywords: Tourism education, Teaching, Evaluation, Q-methodology

1 Mr. Dimitrios Stergiou, PhD Researcher, University of Surrey, School of Management Studies for the Service Sector, Guildford, Surrey GU2 5XH, United Kingdom, Tel: +44 (0)1202 293820, Fax: +44 (0)1483 876301, Email: dstergiou@hotmail.com
INTRODUCTION

It is now 33 years since tourism was first offered as a final year option of the B.Sc. (Hons) Hotel and Catering Management course at the University of Surrey (CNAA, 1993, p. 70). At that time tourism education was virtually unheard of in Britain. However, it seems likely that the above introduction of tourism in the higher education agenda played a significant part in introducing tourism studies at all levels in the UK. Today at least 50 UK institutions are offering tourism courses which have proved to be extremely popular with students (Airey, 1997; Airey and Johnson, 1998, 1999; HESA, 1997; Middleton and Ladkin, 1996). In a study area which seemed to be suffering neglect three decades ago, we have witnessed an almost unparalleled growth by educational standards and there is little evidence that consolidation in such courses is either likely or even a considered possibility. Indeed, evidence suggests that the expansion in tourism education is set to continue on an international level (for example see Dipartimento del Turismo, 1996; Koshizucha et al., 1998; Payne, 1998).

Alongside this growth in provision and student numbers there has also been a corresponding expansion of academic articles and texts on the subject of tourism education ranging from general texts such as Cooper et al. (1994), curriculum studies such as Stear (1981), and reviews of tourism education programmes such as Parsons (1991). There are also currently three journals that specifically cater for educational issues in the field (Journal of Hospitality and Tourism Education, Journal of Teaching in Travel and Tourism, Journal of Hospitality, Leisure, Sport, and Tourism Education). However, the stance of this literature provides the rationale for this study. Much of the literature is uncritical and rarely challenges the status quo of tourism education (Tribe, 1999). In particular, there are three worrying aspects to the existing literature. First, so many of the points addressed are in fact a recycling of issues from the tourism literature which has been published over the years. Secondly, the preoccupation of authors and researchers with what is and what ought to be taught - the curriculum - has tended to drive out issues related to the conduct of teaching, to the extent that research on teaching within the field is notable mainly for its absence. But thirdly, and perhaps more seriously, there is little that offers insights based on the extensive literature of education. It is here that this study proposes to add a critical and philosophical perspective. This perspective seeks to address issues about the nature and the evaluation of teaching in tourism higher education by drawing upon thinking and research from education as well as from tourism.

Against this background and focusing particularly on higher education for the tourism sector in the UK, this paper describes a preliminary small-sample study designed to explore views of desirable teacher behaviour and perceptions as to the knowledge base of tourism teachers held by tourism academics and students studying in the field. The method applied is Q-methodology, a technique that can be used to gain important insights on individuals' judgements, attitudes and points of view on topics or situations that involve subjectivity. The output of the study is a preliminary set of statements that may form the basis of scaling in a later phase of the research. The findings are presented in a way that promotes discussion on the development of constructs for the evaluation of the teaching of tourism academics.
THE RATIONALE FOR USING Q-METHODOLOGY IN TEACHING EVALUATION RESEARCH

According to George and Cowan (1999), evaluation is the process in which comparisons are made between aspirations, or targets or ideals, and reality; consequently a judgement emerges as a result. At the heart of the concept of an evaluation process lies a set of central directive states, such as values, attitudes and motives, that, when aroused, influence behaviour generally and judgements particularly (Bruner, 1951; Bruner, 1958). In other words, there is an antecedent cognitive structure consisting of a complex set of criteria, which influence our judgmental evaluations (Kelly, 1955; Kerlinger, 1966).

From an educational perspective, the basic notion underlying this line of thinking is that the dimensions for the evaluation of teaching lie within this cognitive structure. From this basic platform it is then assumed that evaluation of teaching is likely to be based on more than one dimension and that there will be a structure of related dimensions at work. On the principle that the issue of evaluation is directly related to the nature of teaching (Gage, 1996; Squires, 1997), the aforementioned assumption is, to an extent, supported by empirical evidence in that teaching was found to be a multi-dimensional phenomenon (Smith, 1988; Cave et al., 1988; Ramsden, 1991) - e.g. that a teacher might rate high in one area of classroom behaviour and not rate equally high in another (Ryan and Wandt, 1952).

It is the multi-dimensional character which has generated an empirical drive within the literature towards the identification and validation of such dimensions. However, there is a suspicion in the empirical studies that either the dimensions themselves are interpreted in a variety of ways or that the scales deriving from those dimensions are inappropriately used (Biggs, 1993). Even though common factor structures may underlie scales derived from a variety of research programmes (Entwistle and Tait, 1990; Kerlinger, 1966; Gibb, 1955), the conceptual problem of how they may be interpreted remains unresolved. The thrust of the argument here is based on the assumption that the concept of teaching evaluation is a subjective entity that can be interpreted in a variety of ways. Therefore, the approach required should be one that can capture subjectivity. This is a case that can benefit from Q methodology and its technique, Q-sort test (Stephenson, 1953).

Q methodology, first popularised by the British/American psychologist and physicist William Stephenson (1935a, 1935b), provides researchers with a systematic means for investigating subjective judgments on a particular topic or given situation (McKeown and Thomas, 1988). Dennis (1986, p. 9) characterised Q methodology as a means to address ‘questions that seek to develop and understand the dimensions of subjective phenomena [...]’. It is a versatile methodology which systematically combines strengths from qualitative and quantitative research paradigms by building a bridge between human subjectivity and objective quantification (Coxon and Jones, 1978; Brown, 1996). Despite its potential for investigating questions involving priorities and suspected rank orders, it is especially suited in cases where the very existence of concepts have not been established (Tractinsky and Jarvenpaa, 1995). Evaluation of teaching comes into this category. There is still very little consensus in educational circles about what a good teacher is (Kerlinger, 1966; Squires, 1999). This situation, in other words, is vague and unstructured. Q-sort technique addresses problems of this nature.

The output of a sample of Q-sort tests should be seen as proof of a ‘reliable schematic’ or cognitive pattern (Thomas and Baas, 1992). It plays a role of setting up empirical approaches so that theory can be tested (Kerlinger, 1992). Essentially, Q-sort is about finding concepts and categories, which capture an entity by finding stimuli that can be clustered.
together to form a description of it (Ekinci and Riley, 2001). However, it should be made clear from the beginning that without confirmatory factor analysis one can rarely generalise to populations from Q persons samples (Kerlinger, 1992). In this case, the technique must be seen only as a preliminary methodology the output of which must be submitted to more empirical approaches (McKeown and Thomas, 1988).

THE THEORY

This section outlines a theory, the basic purpose of which is to offer an ontological conception of teaching which will form the basis for the development of a construct for the evaluation of academics teaching tourism. The theory may be expressed in the following two propositions:

1. Dimensions of teaching evaluation should be introduced as evaluative elaborations on the generic concept of teaching.

2. There exists a basic dichotomy in the dimensions on which teachers vary, corresponding generally to (1) a teacher’s understanding of what is to be taught, and (2) how it is to be taught.

Some brief explanation of the rationale behind this theory is in order. The more one studies education, the more one becomes convinced of a confusion of the generic meaning of ‘teaching’ with its elaborated forms, such as good teaching and successful teaching (Jackson, 1986; Squires, 1999). An investigation into the features that are attached to the concept of teaching, as a result of the way the term is used in the language of everyday discourse, sets forth an analysis, the main point of which is to present an argument regarding the dimensions of a construct for the evaluation of teaching in tourism higher education that also reveals how easily we can confuse the generic meaning of teaching with its elaborated meanings. The question that focuses the argument is one posed by Hirst (1973) some years ago: How do we distinguish teaching from other activities? This question initiates an ontological analysis, the task of which is to tease out the basic meaning of the term ‘teaching’.

The work of Fenstermacher on the different methods for research on teaching provides a helpful way to initiate this analysis. He sets forth what he calls ‘The Generic Conditions’ for teaching (Fenstermacher, 1986, p. 38), as follows:

1. There is a person, P, who possesses some content, c, and who
2. intends to convey or impart c to
3. a person, R, who initially lacks c, such that
4. P and R engage in a relationship for the purpose of R’s acquiring c.

Returning to the question that initiated this inquiry (how do we distinguish teaching from other activities?), one answer is that a teacher possesses some knowledge or other content not understood by others, presumably the students, and he or she intends to convey this content to the students, leading to a formation of a relationship between them for this purpose. In doing so, the tasks of the teacher include selecting the content to be learned, adapting the material to the level of the students, helping students to get access to the content, serving the students as a primary source of knowledge so that the student becomes skilled at acquiring content. Therefore, the capacity to teach centres around a teacher’s understanding of what is to be taught and how it is to be taught (Shulman, 1987). Although
this core conception of teaching is also an incomplete one (e.g. nothing has been said about R's state of mind and/or about P's possession of c) it must suffice to note here that the five characteristics listed above constitute a generic meaning of teaching.

The generic conditions provide the basis for answering whether or not some activity is teaching as opposed to something else. It follows logically that any additions to these conditions are simple elaborations on this generic concept (Fenstermacher, 1986). There are many ways to elaborate on this generic notion depending on the approach adopted by researchers when they study the concept (e.g. anthropologists make cultural elaborations, educational psychologists make behavioural elaborations, and so on). In this sense, researchers concerned with what might be called the appraisal conditions of the activity make evaluative elaborations.

That P is successful or unsuccessful at the task of teaching is determined by evaluative elaborations on the generic conditions and not by the generic conditions themselves. This is as it should be, for it is important not to confound the generic meaning of the term with elaborations regarding the goodness of the activity (Fenstermacher, 1986). However, it is argued here that the generic conditions provide a theoretical foundation that allows empirical questions related to the evaluation of teaching to be formulated more precisely and productively than they have sometimes been in the past. In fact, this approach was, on reflection, suggested by Squires (1997) who stressed the importance of arriving at an adequate conceptualization of teaching before tackling its evaluative issues.

Having established the relationship between the ontology and the evaluation of teaching, the focus of the discussion returns to the generic conditions of the activity because they suggest two basic and powerful questions that we can ask about all teaching situations. These questions will be elaborated eventually to form the two dimensions of a construct for the evaluation of teaching in tourism higher education. The two questions are: What is to be taught? How is it to be taught?

The first question permits us to consider a key aspect of the teaching process, that of the content of a subject. In education, the word ‘content’ can refer either to everything that the student experiences as part of a course, or it can refer more narrowly to the subject matter (Squires, 1999). It is being used in the latter sense here, because it is important to identify content as an aspect of teaching that needs attention in its own right, and does not simply get subsumed under other ‘context variables’ variables (Dunkin and Biddle, 1974; Shavelson and Stern, 1981; Shulman, 1986a, 1986b).

Central to any discussion of content is the academic unit responsible for teaching this content. The thrust of the argument is based on the assumption that a teacher should certainly possess a certain minimum understanding of the subject to be taught (Wilson, Shulman and Richert, 1987). For all its apparent obviousness, this argument introduces a new twist in the analysis. Up to this point, the subject matter of a course has been the focal concept, whereas a teacher’s subject-knowledge now appears to be an equally important conception. This twist in the analysis may be stated in the form of a question: What knowledge is essential for teaching? However, on the basis of the principle that subject matter knowledge is topic-specific (Leinhardt and Smith, 1985), the key question in the context of this study is: What knowledge is essential for an academic teaching tourism? This inquiry into the nature of teacher knowledge within the confines of tourism higher education is an epistemological one.

One may, with reason, wonder whether any benefit is to be gained by working one’s way through the epistemological underbrush while traversing the teacher knowledge ter-
rain. The value is in having a basis for deciding whether the knowledge of one teacher is better, more trustworthy, or more resistant to criticism than the knowledge of any other teacher. Fenstermacher (1994, p. 34) put it clearly when he asserted that ‘to the extent that a conception of knowledge has epistemic merit, it will provide a basis for determining the strength, confidence, or trustworthiness of a claim to know something’. While far more can be said regarding the epistemological aspects of a teacher’s subject-knowledge, what is important here is that the teacher has special responsibilities in relation to subject-knowledge, serving as the primary source of student understanding of subject matter (Smith, 1983). This responsibility places special demands not only on the teacher’s own depth of subject matter knowledge, but also on the teacher’s understanding of how that knowledge should be ordered in ways that will be clear and accessible to the students (Shulman, 1987).

The analysis above opens up the wider discussion concerning the methods of teaching. It is significant that we are coming to methods last, because in many books in teaching they come first. The whole of the preceding discussion on subject-knowledge should have made it clear why one cannot begin with methods. Methods are not synonymous with teaching nor can the activity be reduced simply to its methods (Squires, 1999). But by the same token we must not dismiss them. It is not enough to know about teaching and/or to have mastery of a subject (Wilson, Shulman and Richert, 1987). In the end one has to teach and this inescapably involves methods.

What does concern us here is what we actually mean by a teaching method. Within the realm of teaching studies, ‘method’ refers to all forms of educational hardware and software that teachers have at their disposal and the methods and techniques for using them (Squires, 1999). It is in this sense that we can speak of teaching methods as procedural, in that a teacher is always involved in going about things and doing things. The word procedural is being used here not only to mean an identifiable, often linear sequence of steps and operations but also to capture the subtler and less explicit ways, styles and approaches that form part of the collective professional wisdom of teachers. The main source of this idea is Squire’s work on the professionalisation of teaching (1999) which, drawing on Doyle’s (1988) declarations, warns against too reductive an approach to teaching methods in the sense that they go beyond everyday expertise. In Squire’s terms, the point about teaching methods is that they need to be tailored to situations which are not wholly routine, but in which new problems have to be handled. The implication of this is that although everyday common sense is important, it is insufficient to meet professional demands and the teacher has to acquire some additional kinds of know-how: the capacity to turn intention into effect in a particular context. Methods of teaching thus connote not just a particular technique (e.g. group work) but also a whole approach to teaching, and it is in this sense that the term is used here.

While we may seem to have come a long way from the initiation of this analysis, the underlying point is still the same. The means and forms of teaching structure and colour our perception of the whole activity. Teachers’ understanding of what is to be taught is entangled with how they teach it. This basic split in thinking about the activity of teaching was built into the present study in the form of two major dimensions on which teachers vary and on which the investigation would rest. These two dimensions, described as teacher knowledge and teaching ability, form the basis of the Q-sort procedure.
THE Q-STUDY

To demonstrate how Q-methodology can be used to broaden our understanding of the teaching evaluation process within the context of tourism higher education in the UK, we undertook a small sample Q study. For contrast and clarity the sample was selected from two groups - tourism educators and students of the field. At this stage the objective is to identify common dimensions by which vocational education teachers are evaluated and common perceptions as to the knowledge base of tourism academics.

The Instruments

The theory, as described above, was built into two Q-sorts: TAQ (Teaching Ability Q-Sort), the Q-sort to identify common evaluation dimensions of teaching in vocational education, and TKQ (Teacher Knowledge Q-Sort), a sort used to measure common perceptions regarding the knowledge base of tourism academics.

Teaching Ability Q-Sort. TAQ consists of 80 items. The items in the sort are short concise statements that reflect teacher classroom behaviour in the following areas: concern for students, classroom technique, stimulation, and control. The areas were those used in an earlier study by Sontag (1968). They were chosen because they represented a logical classification for the behaviours that are presumably most pertinent to the evaluation of teaching and, therefore, were expected to produce a useful form of analysis.

Teacher Knowledge Q-sort. TKQ consists of 60 cards, each having typed on it a single statement. The statements have been devised to represent a hidden structure. The areas of the structure were drawn from several sources, the most fruitful of which were Bruner (1966) and Daley (1999), and are as follows: ways of learning, relation to context of industry, knowledge structure, security of knowledge, relationship to theory, and current versus fundamental knowledge.

The 140 statements were culled from existing studies, various educational books and periodicals, or prepared by the writers on the basis of their knowledge of the field. The following criteria of selection were used: representative sampling of the examined domains; economy in the number of scales and items; non-repetitiveness; lack of ambiguity. Academics and postgraduate students doing research in this area were also used to refine the statements (face validity).

The Sample

Thirty-one subjects (48% female, 52% male) took part in the Q-sort tests. According to Brown (1986), sample sizes of this range are more than adequate for studies of public opinion. At this preliminary stage of the research, the only qualification was that the subjects were either tourism teachers or students registered on tourism related programmes. Overall, the sample consisted of 10 tourism teachers, 14 postgraduate and 7 research students.

Administration and Conditions of the Q-Sorts

Each subject selected was presented with two decks of numbered stimulus cards. In order to avoid confusion, the items for the TAQ were typed on white index cards while those for the TKQ on yellow ones. Subjects were asked to sort the items according to a standard
set of instructions typed on a card. The instructions for the TAQ boil down to: Please sort the cards on the basis of whether in your opinion they represent 1) excellence in teaching; 2) ordinary competence in teaching; or are 3) not relevant to either. Subjects were further instructed to sort the items for the TKQ according to whether in their opinion they represent 1) an expert academic in tourism; 2) a novice academic in tourism; or are 3) not relevant to either. These types of response categories were chosen because of Elton’s (1996) work on the distinction between teaching competence and teaching excellence, which suggests that the first thing to achieve in teaching is general competence, and of Squires’ work (1999), which proposes that the concept of expertise captures the essentially dynamic and active nature of teaching and the kinds of knowledge that inform it. In both cases the ‘not relevant to either’ option was used because we are not certain that the dimensions exist at all. Therefore, using a forced choice approach would run the risk of a false assumption. The respondents read the cards and sorted them into the aforementioned response categories which were contained on two A4 sized pages (one for each Q-sort) that served as placement boards.

It is also necessary to state two defining rules in order to judge the final result in the Q study. First, the rules of the procedure are that a category only exists if at least two statements legitimately describe it and second, for a statement to be legitimate 60 per cent of the sample must have allocated it to the same category (Hinkin and Schriesheim, 1989). In this sense, proof that a dimension exists is through finding stimuli, which describe them (Ekinci and Riley, 2001). At the final stage, four to six statements per every dimension should be obtained in order to provide adequate internal consistency (Hinkin et al., 1997).

The Findings

The overall result for the TAQ is illustrated in Appendix A, which demonstrates the frequency of qualifying to non-qualifying statements for the sample. The percentage figure represents the degree of consensus between the sample on how far the statement describes the category to which it was assigned. The output of this stage for the TAQ was that of the original 80 statements, 27 qualified under the 60% rule. This meant that each of the dimensions had at least six statements assigned to them. The dimension of control was the exception in that it had only two qualifying statements assigned to it, which means that the internal consistency for this dimension was not obtained. For the purpose of this case, these two statements were disqualified. This leaves 25 qualifying statements, 18 of which were placed on ‘excellence in teaching’ and 7 on ‘ordinary competence in teaching’ (see Table I). The reaction of respondents is also shown to the ‘not relevant to either’ option.

Appendix B shows the performance of all the statements of the TKQ, 37 of which passed the qualifying criteria. However, since a novice tourism academic was seen as someone who is insecure and whose knowledge demonstrates a clear lack of flexibility in the way that it is organised and represented, this category was thought to be interpreted as negative by the sample and hence for the purpose of this paper and analysis was excluded. This means that 28 statements (those assigned to the ‘expert academic in tourism’ option) with at least four attached to each dimension of the hidden structure were retained. However, one of the dimensions had only one qualifying statement assigned to it (security of knowledge). In these circumstances this statement had to be disqualified. The retained validated statements for the TKQ are shown in Table II.

The output of the Q-sort tests is a set of 52 items with at least four attached to each proposed dimension. This gives support to the notion that such dimensions exist (Brown,
Having obtained a sufficient number of statements, the next stage of the research is to transfer the accepted statements to a questionnaire and for them to be tested using a range of scaling techniques.

**CONCLUSIONS**

A realistic view of the literature on tourism education may be that whilst it demonstrates considerable progress, it still has not been concerned with the issue of teaching evaluation. This study attempts to address this gap by making progress towards the development of a construct for the evaluation of academics teaching tourism.

In methodological terms, the purpose of this study has been to illustrate the value of Q-sort technique as a preliminary process in scale development. The technical argument in favour of the Q-sort technique is that although the qualifying statements will actually have to be submitted to a range of scale types, they already have had the subjectivity and bias reduced. In other words, particular attention has been paid to the item development stage before moving to the further analysis. Indeed, Ekinci and Riley (1999) proposed that this process should be accepted in studies involving subjective evaluations. Hinkin et al. (1997) also provide support to the approach adopted here when they characterise the item development stage as the foundation of internal consistency reliability.

However, the results obtained with the Q approach are important for two more reasons. The first is that the findings reported here are the outcome of the shared perceptions of educators and students. One of the telling criticisms of previous work which has rarely been addressed is that the construction of scales for the evaluation of teaching was perhaps biased by the occupational role of the sampled subjects. This criticism loses much of its weight when subjects of different occupational roles (e.g. teachers and students) are used since a source of bias is ruled out. Secondly, the study reported in this paper is theory driven. This has particular implications for the study’s results since research findings are always strengthened when yielded by research instruments which have been developed on the basis of a sound theoretical foundation (Bagozzi, 1984). Ekinci and Riley (1999, p. 288) put it quite clearly when they asserted that ‘consistency between theory development and empirical testing is to the benefit of both’. In fact, this study makes the suggestion that if there are to be advances in the research on the evaluation of teaching in tourism higher education, bridges need to be made which link to the cognitive and education literature.

Over and above these, however, the study reported here has a much wider significance. After about three decades of neglect, it is the first real attempt to look systematically at issues of teaching evaluation in higher education for the tourism sector. To the extent that this is a pioneering study it inevitably contains weaknesses. The preliminary nature of this study and the fact that it is based solely on the experience of tourism education in the UK, put restrictions on the generality of the findings. These limitations apart, the approach and findings of the study provide what is believed to be a useful starting point for an understanding of the desirable teacher behaviour and characteristics of the knowledge base of tourism academics engaged in the conduct of teaching in tourism higher education. The significance of this kind of information for tourism education hardly needs to be stated.
REFERENCES


Proceedings of the 8th Australian Tourism and Hospitality Research Conference (p. 579), (Canberra: Bureau of Tourism Research).


Table I
The validated statements of TAQ Dimensions and their statements

A. Statements placed on ‘excellence in teaching’ option

Concern for students
1. Encourages students through intrinsic factors such as curiosity and sense of achievement 94
2. Diagnoses students’ misunderstandings and tries to represent the information in a different way 94
3. Develops students capacity to think for themselves 90
4. Explores with students new approaches and meanings 87
5. Structures new information so that it can be integrated with prior knowledge 81
6. Provides students with opportunities to influence the design and delivery of learning programmes 81
7. Is committed to providing students with feedback 71
8. Explores students’ personal opinions and ideas 65
9. Enables students to concretise their own learning 61

Classroom technique
1. Varies teaching approach according to the content 81
2. Sums up the big points at the end 65
3. Uses many examples 61
4. Recaps on previous lecture 61

Stimulation
1. Encourages students to discover for themselves 87
2. Can bring examples from the field 84
3. Paints visual pictures of ideas and concepts 77
4. Uses examples to uncover principles 77
5. Uses visits to industry 68

Control

B. Statements placed on ‘ordinary competence in teaching’ option

Concern for students
1. Gives more support to those students identified as being less able to learn independently 61
2. Is available for individual questions after the lesson 61
3. Adapts lecture content to the perceived ability of students 61

Classroom technique
1. Announces the objectives of the lecture at the beginning 61
2. Tells students what is worth taking down 61
3. Sets up rules of engagement and sticks to them 61

Stimulation
1. Uses marks as a form of motivation 61

Control

n = 31
Table II

The validated statements of TKQ
Dimensions and their statements $n = 31$

<table>
<thead>
<tr>
<th>Ways of learning</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Gets to the academic journals on a regular basis</td>
<td>81</td>
</tr>
<tr>
<td>2. Learns by assimilating new information with past experiences</td>
<td>78</td>
</tr>
<tr>
<td>3. Is involved in academic research in tourism</td>
<td>71</td>
</tr>
<tr>
<td>4. Consults with peers and other tourism professionals</td>
<td>68</td>
</tr>
<tr>
<td>5. Participates in professional meetings and seminars</td>
<td>68</td>
</tr>
<tr>
<td>6. Is involved in relevant consultancy projects</td>
<td>68</td>
</tr>
<tr>
<td>7. Conducts research with academics in other disciplines</td>
<td>68</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Relation to context of industry</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Has regular contact with the tourist industry</td>
<td>84</td>
</tr>
<tr>
<td>2. Uses examples from the tourist industry</td>
<td>84</td>
</tr>
<tr>
<td>3. Keeps abreast of developments in the tourist industry</td>
<td>77</td>
</tr>
<tr>
<td>4. Is aware of the key developments in the tourist industry</td>
<td>77</td>
</tr>
<tr>
<td>5. Has a good knowledge of the sources of information about the industry</td>
<td>77</td>
</tr>
<tr>
<td>6. Has direct experience of the tourist industry</td>
<td>71</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Knowledge structure</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is able to explain one idea in many different ways</td>
<td>88</td>
</tr>
<tr>
<td>2. Uses alternative representations of subject-matter</td>
<td>77</td>
</tr>
<tr>
<td>3. Constructs the subject-matter as a web of central, interconnected concepts</td>
<td>74</td>
</tr>
<tr>
<td>4. Organises the subject-matter on the basis of underlying abstract principles</td>
<td>61</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Security of knowledge</th>
<th>Frequency (%)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Relationship to theory</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Explains the limitations of theory</td>
<td>88</td>
</tr>
<tr>
<td>2. Can explain theories clearly</td>
<td>81</td>
</tr>
<tr>
<td>3. Uses theory from more than one discipline</td>
<td>81</td>
</tr>
<tr>
<td>4. Is able to explain facts and practical examples</td>
<td>80</td>
</tr>
<tr>
<td>5. Is able to use theoretical bases to illuminate/challenge industry practice</td>
<td>80</td>
</tr>
<tr>
<td>6. Quotes empirical research to support points</td>
<td>77</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current vs. fundamental knowledge</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Their knowledge draws upon literature over time, not just the most recent</td>
<td>90</td>
</tr>
<tr>
<td>2. Delivers the most up-to-date material</td>
<td>81</td>
</tr>
<tr>
<td>3. Emphasises change</td>
<td>61</td>
</tr>
<tr>
<td>4. Delivers material perceived as most helpful</td>
<td>61</td>
</tr>
</tbody>
</table>
Appendix A

Table A1

The overall result of TAQ Dimensions and their statements  \( n = 31 \)

<table>
<thead>
<tr>
<th>Concern for students</th>
<th>EXC</th>
<th>OC</th>
<th>NR</th>
</tr>
</thead>
</table>
| 1. Encourages students through intrinsic factors such as curiosity  
  and sense of achievement | 94  | 6  | -  |
| 2. Diagnoses students’ misunderstandings and tries to represent  
  the information in a different way | 94  | 6  | -  |
| 3. Develops students’ capacity to think for themselves | 90  | 7  | 3  |
| 4. Explores with students new approaches and meanings | 87  | 13 | -  |
| 5. Structures new information so that it can be integrated with prior  
  knowledge | 81  | 19 | -  |
| 6. Provides students with opportunities to influence the design and  
  delivery of learning programmes | 81  | 13 | 6  |
| 7. Is committed to providing students with feedback | 71  | 29 | -  |
| 8. Explores students’ personal opinions and ideas | 65  | 32 | 3  |
| 9. Enables students to concretise their own learning | 61  | 32 | 7  |
| 10. Believes that it is what students do, rather than what teachers  
   do, that determines whether changes in their understanding actually  
   take place | 55  | 29 | 16 |
| 11. Is sensitive to students’ feelings about learning | 48  | 39 | 13 |
| 12. When planning lessons, takes into consideration students’ prior  
   learning | 48  | 48 | 4  |
| 13. Varies interaction with students in the light of perception of  
   students’ willingness to learn | 42  | 26 | 32 |
| 14. Structures discussion around students’ misunderstandings | 39  | 39 | 22 |
| 15. Sees teaching as a process of working with students to help  
   them change their understanding | 39  | 29 | 32 |
| 16. Gives more support to those students identified as being less  
   able to learn independently | 39  | 61 | -  |
| 17. Is available for individual questions after the lesson | 36  | 61 | 3  |
| 18. Adapts lecture content to the perceived ability of students | 36  | 61 | 3  |
| 19. Refrains from offering feedback to engage students in self  
   appraisal | 13  | 32 | 55 |
| 20. Believes that treating students individually is impracticable | 6   | 29 | 65 |

<table>
<thead>
<tr>
<th>Classroom technique</th>
<th>EXC</th>
<th>OC</th>
<th>NR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Varies teaching approach according to the content</td>
<td>81</td>
<td>19</td>
<td>-</td>
</tr>
<tr>
<td>2. Sums up the big points at the end</td>
<td>65</td>
<td>35</td>
<td>-</td>
</tr>
<tr>
<td>3. Uses many examples</td>
<td>61</td>
<td>39</td>
<td>-</td>
</tr>
<tr>
<td>4. Recaps on previous lecture</td>
<td>61</td>
<td>32</td>
<td>7</td>
</tr>
<tr>
<td>5. Connects lectures to reading</td>
<td>55</td>
<td>45</td>
<td>-</td>
</tr>
<tr>
<td>6. Repeats points during lectures</td>
<td>55</td>
<td>42</td>
<td>3</td>
</tr>
<tr>
<td>7. Explains the sequence of the lecture at the beginning</td>
<td>45</td>
<td>45</td>
<td>10</td>
</tr>
<tr>
<td>8. Takes questions during lecture</td>
<td>42</td>
<td>52</td>
<td>6</td>
</tr>
<tr>
<td>9. Brings in many guest lecturers</td>
<td>42</td>
<td>45</td>
<td>13</td>
</tr>
<tr>
<td>10. Is prepared to get diverted</td>
<td>42</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>11. Announces the objectives of the lecture at the beginning</td>
<td>36</td>
<td>61</td>
<td>3</td>
</tr>
<tr>
<td>12. Uses group work as a teaching method</td>
<td>32</td>
<td>49</td>
<td>19</td>
</tr>
<tr>
<td>13. Gives out handouts well before the lecture</td>
<td>29</td>
<td>32</td>
<td>39</td>
</tr>
<tr>
<td>14. Uses overheads throughout</td>
<td>23</td>
<td>42</td>
<td>35</td>
</tr>
</tbody>
</table>
15. Constantly refers to lecture notes 16 45 39
16. Refers questions to the end 16 45 39
17. Tells students what is worth taking down 13 61 26
18. Paces the lecture to the level of the better students 6 42 52
19. Constantly presents information in list form 6 42 52
20. Sets up rules of engagement and sticks to them 3 61 36

**Stimulation**
1. Encourages students to discover for themselves 87 10 3
2. Can bring examples from the field 84 16 -
3. Paints visual pictures of ideas and concepts 77 16 7
4. Uses examples to uncover principles 77 23 -
5. Uses visits to industry 68 29 3
6. Asks students to solve puzzles or problems 52 45 3
7. Develops personal rapport with students 48 29 23
8. Maintains a lively pace 45 45 10
9. Makes use of visual aids 45 42 13
10. Uses technology to teach 32 45 23
11. Tells jokes 26 39 35
12. Uses elaborate metaphors 26 29 45
13. One surprise in every lesson 26 29 45
14. Plays games 23 23 54
15. Tries to be liked 13 26 61
16. Likes to ‘shock’ students 7 16 77
17. Emphasises the difficulty of the subject 3 32 65
18. Uses marks as a form of motivation 3 61 36
19. Refers to golden age in the past - 16 84
20. Reveals past pass rates - 36 64

**Control**
1. Maintains order without apparent effort 61 29 10
2. Maintains eye contact with the audience 52 35 13
3. Carefully times lectures 36 48 16
4. Exposes own personality 19 23 58
5. Emphasises time on task 16 48 36
6. Constantly moves about the room 16 16 68
7. Demands attention from students 13 52 35
8. Teacher positions themselves on a higher level than the students 13 23 64
9. Addresses questions to noisy students 13 45 42
10. Has a strong self image 10 35 55
11. Corrects spelling 10 61 29
12. Tightly controls discussion 10 48 42
13. Marks to a rigid marking scheme 7 48 45
14. Singles out talking students 6 36 58
15. Does not allow digression 6 42 52
16. Openly compares class with previous years 3 23 74
17. Claims authority for the knowledge imparted 3 36 61
18. Walks out if students had not done sufficient reading 3 19 78
19. Hides personality - 29 91
20. Never uses student names - 23 77

1 Excellence in teaching. 2 Ordinary competence in teaching. 3 Not relevant to either.
## Appendix B

### Table B1

<table>
<thead>
<tr>
<th>Dimensions and their statements</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The overall result of TKQ</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ways of learning</th>
<th>EXP$^1$</th>
<th>NOV$^2$</th>
<th>NR$^3$</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Gets to the academic journals on a regular basis</td>
<td>81</td>
<td>3</td>
<td>16</td>
</tr>
<tr>
<td>2. Learns by assimilating new information with past experiences</td>
<td>78</td>
<td>19</td>
<td>3</td>
</tr>
<tr>
<td>3. Is involved in academic research in tourism</td>
<td>71</td>
<td>10</td>
<td>19</td>
</tr>
<tr>
<td>4. Consults with peers and other tourism professionals</td>
<td>68</td>
<td>13</td>
<td>19</td>
</tr>
<tr>
<td>5. Participates in professional meetings and seminars</td>
<td>68</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>6. Is involved in relevant consultancy projects</td>
<td>68</td>
<td>10</td>
<td>22</td>
</tr>
<tr>
<td>7. Conducts research with academics in other disciplines</td>
<td>68</td>
<td>3</td>
<td>29</td>
</tr>
<tr>
<td>8. Differentiates experiences from new information</td>
<td>52</td>
<td>22</td>
<td>26</td>
</tr>
<tr>
<td>9. Reads research reports and more informal studies</td>
<td>48</td>
<td>29</td>
<td>23</td>
</tr>
<tr>
<td>10. Continuously tries to absorb as much as possible</td>
<td>45</td>
<td>32</td>
<td>23</td>
</tr>
<tr>
<td>11. Describes own learning as a process of concept formation</td>
<td>42</td>
<td>32</td>
<td>26</td>
</tr>
<tr>
<td>12. Directly assimilates new information by striving to link this to <code>something I had seen</code></td>
<td>32</td>
<td>29</td>
<td>39</td>
</tr>
<tr>
<td>13. Refreshes knowledge by reading the basic books in the field</td>
<td>29</td>
<td>61</td>
<td>10</td>
</tr>
<tr>
<td>14. Reads a little bit of everything</td>
<td>26</td>
<td>42</td>
<td>32</td>
</tr>
<tr>
<td>15. Refreshes knowledge by following other people's reading lists</td>
<td>13</td>
<td>48</td>
<td>39</td>
</tr>
<tr>
<td>16. Follows big name writers</td>
<td>3</td>
<td>61</td>
<td>36</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Relation to context of industry</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Has regular contact with the tourist industry</td>
<td>84</td>
</tr>
<tr>
<td>2. Uses examples from the tourist industry</td>
<td>84</td>
</tr>
<tr>
<td>3. Keeps abreast of developments in the tourist industry</td>
<td>77</td>
</tr>
<tr>
<td>4. Is aware of the key developments in the tourist industry</td>
<td>77</td>
</tr>
<tr>
<td>5. Has a good knowledge of the sources of information about the industry</td>
<td>77</td>
</tr>
<tr>
<td>6. Has direct experience of the tourist industry</td>
<td>71</td>
</tr>
<tr>
<td>7. Emphasises academic qualifications over industrial ones</td>
<td>10</td>
</tr>
<tr>
<td>8. Does not have relevant industrial experience</td>
<td>4</td>
</tr>
<tr>
<td>9. Believes managers in the tourist industry are up-to-date</td>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Knowledge structure</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is able to explain one idea in many different ways</td>
<td>88</td>
</tr>
<tr>
<td>2. Uses alternative representations of subject-matter</td>
<td>77</td>
</tr>
<tr>
<td>3. Constructs the subject-matter as a web of central, interconnected concepts</td>
<td>74</td>
</tr>
<tr>
<td>4. Organises the subject-matter on the basis of underlying abstract principles</td>
<td>61</td>
</tr>
<tr>
<td>5. Organises the subject-matter on the basis of literal concrete cues</td>
<td>39</td>
</tr>
<tr>
<td>6. Enters the classroom with many ideas in mind</td>
<td>39</td>
</tr>
<tr>
<td>7. Works at a level of causal relationships</td>
<td>36</td>
</tr>
<tr>
<td>8. Brings unrelated information and ideas together</td>
<td>35</td>
</tr>
<tr>
<td>9. Enters the classroom with a few ideas in mind</td>
<td>19</td>
</tr>
<tr>
<td>10. Favours one way of subject matter representation to the exclusion of others</td>
<td>-</td>
</tr>
</tbody>
</table>
### Security of knowledge

1. Is prepared to say ‘I don’t know’ | 62 | 19 | 19
2. Emphasises common sense | 45 | 68 | 29
3. Carefully plans lessons around the text that accompanies the course | 32 | 49 | 19
4. Is a faithful rule-follower, taking on established positions and authorities in the field | 3 | 61 | 36
5. Closes down divergent or dissenting points of view very quickly | - | 65 | 35
6. Does not attempt to answer when the students don’t know | - | 52 | 48
7. Emphasises that ‘one way’ is correct | - | 68 | 32

### Relationship to theory

1. Explains the limitations of theory | 88 | 6 | 6
2. Can explain theories clearly | 81 | 3 | 16
3. Uses theory from more than one discipline | 81 | 13 | 6
4. Is able to explain facts and practical examples | 80 | 10 | 10
5. Is able to use theoretical bases to illuminate/challenge industry practice | 80 | 10 | 10
6. Quotes empirical research to support points | 77 | 10 | 13
7. Their knowledge is well-rooted in the theoretical literature | 55 | 26 | 19
8. Emphasises the practical at the expense of theory | 19 | 36 | 45
9. Favours one concept or theory to the exclusion of others | 7 | 77 | 16
10. Relies only on facts | 6 | 68 | 26

### Current vs. fundamental knowledge

1. Their knowledge draws upon literature over time, not just the most recent | 90 | 10 | -
2. Delivers the most up-to-date material | 81 | 6 | 13
3. Emphasises change | 61 | 13 | 26
4. Delivers material perceived as most helpful | 61 | 23 | 16
5. Emphasises what does not change | 29 | 19 | 52
6. Uses only recent publications in suggested reading | 10 | 61 | 29
7. Dismisses recent references as modern | 7 | 45 | 48
8. Dismisses ‘old’ references as irrelevant | - | 48 | 52

---

1 Expert academic in tourism. 2 Novice academic in tourism. 3 Not relevant to either.
The context of academic leadership in the development of high quality hospitality and tourism courses

Susan Horner, School of Sport and Leisure Management

Abstract

It is becoming clear from experience that Universities who want to develop high quality courses in the hospitality and tourism fields that can cope with scrutiny from quality agencies and customers are relying increasingly on the skills of academic leaders. What is less clear is the particular skills that these academic leaders have to possess to cope with the rapidly changing higher education environment that is becoming increasingly global in nature.

There has been a growing interest in the subject of leadership in the general business literature, and even some research carried out to explore the particular nuances of leadership in a higher education setting. This paper will explore this literature base in the particular context that academic leaders find themselves today. The paper will focus on the following objectives:

- To investigate what the academic leader actually does and explore the particular set of circumstances that will encourage and nurture academic leadership resulting in the development of excellent hospitality and tourism courses.
- To consider the complexity of factors that an academic leader has to deal with during their efforts to produce ideal courses. These include factors at an organisational, local, national, and international level.
- To consider the particular problems that academic leaders can have in reaching their goal to create the ideal course, and discuss ways in which these problems can be alleviated.

This includes initiatives at an organisational and personal level.

The paper will conclude with a model that has been developed on the basis of literature review, personal experience, and empirical research to suggest the ways forward for academic leadership in the hospitality and tourism education field.

Key words: Academic leadership; influences on academic leadership; globalisation, managerialism in higher education.

1 School of Sport and Leisure Management, City Campus, Pond Street, Sheffield S1 1WB, UK
Tel:+44 114 225 555; Fax: +44 114 225 3343; E-mail: s.horner@shu.ac.uk
Introduction

This paper aims to provide the reader with a deeper understanding of the contextual factors that influence academic leaders in higher education institutions. The paper is structured around specific questions in relation to academic leadership, and each question has been researched in the literature to gain a view of the current thinking on each of the areas. Primary research was carried out in the United Kingdom and Hong Kong to provide a view of the situation in different settings, and the results of this research are compared to the current status that has emerged from the literature review.

Methodology

A preliminary literature review revealed an interesting picture of academic leadership at middle management level in higher education. Much of the primary research on the topic of leadership in higher education has been carried out at a senior level, and it has largely taken place in an Anglo-Saxon context. It is clear, however, that major commentators or academic leadership have emerged over the last ten years, and these writers are generally located in English speaking countries, where the demands placed on higher education have become much more fast moving and complex. [Deem 2001] The literature review also revealed that little has been written in Hong Kong about academic leadership, although one landmark article was available that summarises the types of issues that are facing the academic leader in the Hong Kong setting. [Chan and Mok, 2001] It is likely that this literature base will grow, as there is an increased interest in the topic of academic leadership in Hong Kong.

The first part of the paper will refer to the preliminary literature review that was carried out to investigate the context of academic leadership. This process revealed an interesting set of inter-related themes that can be represented on a multi-layered model.

The second part of the paper investigates the main questions that emerged from this preliminary work and tries to come to some view on each of these with reference to a more focused literature review and reference to the primary research carried out in the United Kingdom and Hong Kong.

The preliminary literature review - creating the model

The review of the literature suggests that the topic of leadership is one that is debated in the academic world. There is growing evidence that a clearer picture of what an academic leader actually does is developing and there is a growing recognition of the importance of good leadership skills that are required to cope with the increasingly complex environment that leaders in higher education find themselves. [Ramsden, 1998] There is also growing evidence that the selection of academic leaders, and the subsequent training and development of the successful candidate has also been recognised. [McDade, 2001] The selection of an appropriate candidate, the roles they carry out, and their place in an organisational context can therefore be placed in the centre of the model.

The local setting of the higher education institution has also been a feature of the literature. There has been an apparent growing interest in the special cultural features of higher education institutions. A few of these papers have focused on cross-cultural comparisons,
although these are very limited. [Deem, 2001] There are issues involving the concepts of the professional organisation [Morgan 1997] and the growth of a management culture as a reaction to a more market orientated environment. [Exworthy and Halford, 1999, Rustin cited in Jary and Parker, 1998]

"The new managerialism emphasised innovation, creativity and empowerment. The new managers are policy 'entrepreneurs', highly motivated, resourceful, and able to shift the frames of reference beyond established norms and procedures"

Exworthy and Halford, 1999

The issues surrounding the 'old' and 'new' universities is one that has also been debated and it has been suggested that the organisational culture related to this type of institution can be more powerful and override the national cultural setting. [Ramsden, 1998]

These changes in the higher education scene have been accompanied by a fundamental shift in the culture of educational organisations to a more 'managerial order'. [Simkins, 1999] This has also led to recent changes in universities in Europe and North America. Research by Slaughter and Leslie [1997] suggests that globalisation has brought about major changes to higher education which they termed 'academic capitalism'. A further piece of research by Clark [1998] looked at five universities across Europe, and found that they had all become entrepreneurial in style to cope with changing circumstances. It has also been suggested, however, that the absence of rigorous detailed qualitative research, questions the empirical and conceptual conclusions drawn. [Deem 2001] It is clear, however, that the local setting should form the next layer on the model.

There is growing interest in the national setting of the higher education establishments in relation to the differences in general leadership style that exist in different cultures. Leading commentators include the far-reaching research carried out and published by Hofstede [1991], followed by the research carried out by Trompenaars [1993]. A preliminary review of the literature on higher education in Hong Kong suggests that it is facing an interesting period of transition from British rule to a period of Chinese influence. The higher education institutions were organised using the British system, with traditional and vocational models of organisation, and centralised systems of control. This could lead to a superficial view that the culture of these organisations is very similar to the British universities, but closer investigation seems to suggest the complete opposite. The influence of Chinese culture on the institutions will continue to grow as expatriates leave academic posts, and are replaced with Chinese nationals. There are some general trends that are beginning to emerge as a result of increased marketisation of education in an increasingly competitive world. [Chan and Mok, 2001] The national setting of higher education therefore provides the next layer on the model.

Finally, there is a growing interest in the concept of globalisation and the implications for higher education. It could be argued that higher education institutions are simply at the stage of internationalisation. [Van der Wende, 1997] This has resulted in the growth of courses offered by higher education institutions across national boundaries to exploit new opportunities. It is interesting here to refer to the business literature about globalisation to see if any of the concepts relate to a higher education institution. The danger here is that most of the literature base is American, and as such should be treated with some caution. Perhaps the most interesting concept is that of globalisation. [Ohmae 1982, Levitt 1983, Guido 1991] Other commentators have argued against the logic of globalisation, arguing
for the local adaptation of products to suit individual cultural settings. [Douglas and Wind 1987, Kashani 1989, Homma 1991] It is likely that this approach is more appropriate for higher education institutions.

The post-modern consumer, it is suggested, will demand more individualistic and require highly developed products that emphasise the borrowing and mixing of images from other cultures. [Voase 1995, Sharpley 1996] The problem with all these commentators is that they refer to general business, which may have little to offer, to the higher education setting. It is interesting to consider, however, the supply side and the demand side factors that will influence the decisions that academic leaders will make in the future, and the extent to which global factors override local factors in the academic leadership role.

There have been commentators who have suggested that globalised universities are beginning to follow similar paths. [Slaughter and Leslie 1997, Clark 1998] Other commentators have suggested that it is the local and national factors that are still having the most effect on universities. [Gibbons 1998]

It is very interesting to consider the factors that are influencing academic leadership in Hong Kong to try and assess the impact of globalisation on the academic leadership role. It is also interesting to reflect on whether academic leaders have to design teaching, learning, and assessment packages that are suited to the Chinese students’ learning styles. A review of the literature suggests that Chinese students learn in a different way, and are much more likely to engage in collective learning style. It is interesting to reflect here on my experiences of designing and delivering distance learning courses to students in Hong Kong. The level of cultural adaptation of the materials, and the teaching methods have been minimal which contradicts research findings that suggest that it is a requirement to change approaches to meet the demands in Hong Kong. [Craft, Carr and Fung 1998]

The international setting forms the final layer on the model of contextual factors that influence academic leaders in higher education. This model that has been constructed as a result of the preliminary literature review will now be used to consider the subject of academic leadership in more depth. [Figure 1]

**The design of the primary research**

The primary research was designed to consider the questions that had been posed following the preliminary literature review, and to test the relevance of the model of academic leadership that had been drawn up. It was conducted in Hong Kong and the United Kingdom. Research that had previously been carried out on leadership had been criticised in the literature because it had focused on the Principal of the University, rather than the ‘real’ academic leader who tended to occupy a middle management role. [Ramsden 1998] The research also tended to ask them for their own opinions, rather than asking the followers of their views of the leadership processes. [Fuchs Epstein 1991] The research focussed on the academic leader in the middle management position who was responsible for course development and research leadership. It also focussed on students who had graduated from distance learning programmes in Hong Kong to seek their opinions on academic leadership.

**What makes a good academic leader?**

This section of the paper will interrogate the model of academic leadership with reference to three authors who offer different perspectives on academic leadership at different
layers in the model. The first author concentrates on the selection of a suitable candidate who is subsequently socialised in the higher education setting is Sharon McDade. [McDade 2001, McDade and Lewis 1994, McDade and Green 1991, 1994]

The second author who concentrates on the adoption of a managerialist approach in the right organisational context is Craig Pritchard [Pritchard 2000]. This can be viewed as being at the second level of the model. The third author, Susan Weil, suggests that a good academic leader is one who is aware and can exploit the increasingly complex set of features in the business environment. [Weil 1994] This can be viewed as being on the outer level of the model. Each of these authors will now be reviewed in depth in relation to the primary research to try to shed more light on this particular topic.

Sharon McDade is an American Professor who is the Director of the Center for Educational Leadership and Transformation in Washington DC, USA. She has been carrying out a long-term research project entitled ‘Leadership Learning in Higher Education’. This research has become particularly relevant in the US because the presidents of colleges and universities are increasingly leaving their posts early, and not accomplishing their organisational goals. [McDade 2001] Her research has focused on leadership development in the US education setting, and the ways in which educational leaders become better in their job. The research focus has recently extended to the UK, but as yet these research findings have not been analysed or published.

The previous research that she has carried out with colleagues suggests that their personal characteristics, previous experience and socialisation in the higher education setting are all critical to the development of a leader in higher education. [McDade and Lewis 1994, McDade and Green 1991, 1994] Her current research suggests that the ideal educational leader owes some of their expertise to their adolescent experiences and political leadership skills.

The ideal educational leader should be ‘socialised’ into the leadership form that is favoured in a higher education setting, which is very different from the leadership styles favoured in other organisations such as large commercial companies. She suggests that it is essential that the successful academic leader is effectively mentored by another person who she terms a ‘wizard’, which makes reference to the mythical character, Merlin. This seems to be particularly relevant for female academic leaders, although she also found that male academic leaders also benefited from a mentoring by a suitable ‘wizard’. [McDade 2001] The whole of this research programme has focused on the selection process and development strategies for successful academic leaders. The limitations of the research is that it has been carried out to date in an American higher education setting, which is culturally very different from either the UK or Hong Kong.

The primary research did indicate that the academic leaders who responded to the questionnaire had both had long careers in an educational setting. Their experience and research had been developed over a long period of time, and there was evidence in the responses of the fact that mentoring of their juniors was a very important feature of their jobs.

“We have a young and enthusiastic staff here. There are two main issues that we have to deal with. The first is to encourage the potential stars to be as research active as possible in a focused manner. The second task is to encourage more people to be research active”.

Academic Leader Hong Kong 2001

171
This quote indicates the important mentoring and development role that is required in research leadership, which forms an important part of the academic leadership role. The primary research supports the findings of Sharon McDade, despite the different cultural setting. It is also a very similar pattern to experiences at Sheffield Hallam University.

Craig Pritchard is an academic who is currently based in the College of Business at Massey University, New Zealand. He carried out his research however, in the UK in a long interview programme that sampled seventy senior academic postholders in a cross section of higher education institutions. The book that he wrote after the research programme was completed reflected on the interviewing process and he found a number of startling results that were echoed by a number of different respondents. Many of the respondents were finding the new Post Dearing world of higher education a threatening place. The book tells the stories of senior academic leaders who are hamstrung by the bureaucratic centralism of university structures and those who have been repositioned as the new entrepreneurial managers in the ‘new marketised further education’.

The newly formed academic leaders have had to increasingly think of their students as funding units and in the case of female academic leaders, have had to challenge the deeply embedded paternalistic culture of the senior managers in the Universities. [Pritchard 2001]. This author suggests that the academic leader has to adopt a new managerialistic approach, become more entrepreneurial, and challenge the stifling university bureaucracies. It also suggests that the effective academic leader also has to become more student focused and market orientated.

The primary research did support the views of Craig Pritchard The two academic leaders did report that their academic research was having to be more focused on the market. One respondent also reported on the amount of time that was required to attend meetings, presumably where the fundamental decisions in the university were being made. The development of the distant learning programmes by Sheffield Hallam University and Hong Kong Polytechnic University has been a reflection of the organisations becoming more student focused. The student respondents also echoed the importance of academic tutors being clearly focused on their particular needs.

In answer to the question as to whether an academic leader should understand the culture of their students one respondent answered:

“Yes, students tend to reflect their cultural differences in their behaviour. Understanding of our culture helps the leader to better interact with students”

Graduate student Hong Kong 2001

The third major contributor in this area that will be discussed, is Susan Weil who made a very early assessment of the ways in which change could be achieved in Universities and Colleges in the UK.

The research that she carried out relied on personal accounts given by ten heads of institutions, representing a range of traditions in the higher education setting. She found from this research that the academic leadership role was becoming much more difficult because of the complex and rapidly changing business environment that all the organisations were facing.
“The key to the future is to balance two factors: the need for the imaginative delivery of education opportunities to meet the needs of lifelong learning and the pressuring to conform to traditional standards in teaching and learning”.

Susan Weil 1994

The demands on academic leaders have grown since the early research work but the findings of the research still remain true. Academic leaders in educational institutions such as Sheffield Hallam University and Hong Kong Polytechnic University have had to respond to changing demands and become much more aware of new market opportunities. The primary research has shown how Universities have introduced new market orientated suites of courses and research programmes. The student respondents even recognised the complexities of the business environment facing academic leaders in 2001.

The primary research supports all of the three authors’ findings in this section. It suggests that the task of academic leadership is becoming more complex and requires the development of a special type of academic leader who has adopted a managerial and entrepreneurial approach in combination with a student focused style. A very special type of person indeed!

**What factors have an affect on the academic leader in an organisational, national and international setting?**

This section of the paper will interrogate the model to consider the views of three major commentators on the contextual factors that influence academic leaders, and to consider the impact of these at a local, national and international level. This analysis will lead to the next section of the paper which will consider the degree to which global factors are beginning to override local and national factors in the domain of the academic leader.

The first author that I will refer to is Rosemary Deem who works in the Graduate School of Education at the University of Bristol. She suggests that an emphasis on the local setting of universities is critical for the academic leaders. [Deem 2001] The second author for consideration is Geert Hofstede who has carried out extensive research on national culture and leadership. [Hofstede 1991] The third author for consideration is Paul Ramsden who suggests that academic leaders need to adopt a global entrepreneurial approach to leadership in higher education. [Ramsden 1998]

Rosemary Deem's paper that has only recently been published is interesting, because it examines the importance of global and local factors in Western universities. It challenges the work of authors such as Slaughter and Leslie [1997] and Clark [1998] on the basis of their theoretical and empirical bases of their research programmes. These authors have suggested that academic capitalism, entrepreneurial universities and new managerialism had something in common. She contrasts this with the work of Gibbons [1998] that argued that it is local knowledge and innovation that is the critical issue for academic leaders.

She concludes by suggesting that future comparative work on trends in higher education should put more of an emphasis on methodological matters and the local- global axis, rather than on purely researching the global axis.
“It is therefore important that these dimensions are fully encompassed by the theoretical frameworks and methodologies used by those who investigate the ways in which universities in different countries respond to international and global pressures”.

Rosemary Deem, 2001

It is interesting that the most recent paper in those reviewed in this section urges future researchers to concentrate on the local context, as well as the global context, suggesting that previous research carried out in universities has had methodological problems that need to be addressed before grand claims can be made about academic leadership.

The primary research with the academics and students indicated that the local setting and policies have a considerable effect on the academic leader. This issue is of particular interest in future research programmes.

The second author in this section to be reviewed is Paul Ramsden who carried out a large survey of academic leaders in the middle management role in a cross section of British and Australian universities during 1996-7. It is interesting to note that although the author is now the Director of the Griffith Institute for Higher Education in Australia, he has carried out much of his research in the UK, and has a deep understanding of the cultural context of the UK. The book that was published following the work explores the factors that the academic leaders need to embrace to help the demoralised workforce to change to meet their new demands. He found that the effective academic leaders that he spoke to during his research were more likely to be looking for opportunities that were influenced by global market forces, whilst balancing this with an effective leadership style within their organisation.

“Universities will be more flexible in their planning, clearer about their market, stronger in their administration, and more committed to learning how to do better”.

Paul Ramsden, 1998

The primary research indicated that global economic factors are important at country level but are less important to the academic leader at the middle management level, who is currently more interested in local factors.

What is clear from the book, is that the future success of Universities in a competitive world will depend largely on the academic leader’s capacity to respond energetically to change. He suggests that the requirements means that a new style of leader is required who recognises and exploits global opportunities, but couples this with a transformational leadership style to increase the teaching productivity and quality alongside the need to increase quality research output amongst all the academic staff.

The third author to be reviewed in this section is the work of Geerte Hofstede [1980, 1985, 1991]. The book published in 1991 explains the most extensive piece of research that has been carried out into the cultural differences between managers in different countries.

The research was based on 116,000 respondents from a wide range of countries and the results were analysed and comparisons made between the data. Hofstede was able to derive four cultural dimensions by using factor analysis of the means scores in the data. A summary of these four factors and the scores that were obtained for the UK and Hong Kong is shown below:
Table 1: The four cultural dimensions derived from Hofstede’s research and the scores for the UK and Hong Kong

<table>
<thead>
<tr>
<th>Cultural Dimension</th>
<th>Hong Kong</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Power distance</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- shows to what extent that people in the country accept that power is distributed equally in organisations</td>
<td>15</td>
<td>43</td>
</tr>
<tr>
<td>[suggests large power distances favouring higher number of levels of control in organisations]</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Uncertainty avoidance</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- society’s fears of the unknown and the feelings towards uncertainty</td>
<td>49</td>
<td>47</td>
</tr>
<tr>
<td>[a preference for leaders who are outward going, decisive and practical]</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Individualism</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- whether one’s identity is defined by personal choice or by the character of a collective group</td>
<td>37</td>
<td>3</td>
</tr>
<tr>
<td>[a heavy emphasis is on collectivist decisions with a preference for harmony]</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Masculinity - Femininity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- the extent to which men and women play different roles in the culture</td>
<td>18</td>
<td>9</td>
</tr>
<tr>
<td>[a masculine culture which is performance orientated]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Source: Adapted from Hofstede 1991

Table 1 shows that Hofstede found that there were distinct differences between the Hong Kong and the UK cultures, as characterised by the four dimension of culture that he had identified. This research suggests that Hong Kong individuals will favour a more hierarchical organisational design where everybody knows their place, whereas in the United Kingdom people will favour a flatter and less hierarchical organisational design. The most marked collective decision making whereas the United Kingdom culture prefers individual and conflictual decision making. Both cultures were found to be more masculine than feminine in their bias and therefore more performance orientated.

This research indicates that there are fundamental differences between the Hong Kong and the UK culture. The work has been criticised, however, since it was published. One of the main criticisms is that the sampling of individuals from countries was not representative because it was derived from staff at the large multi-national IBM. A further criticism is that Hofstede’s work was biased towards Western values and did not take into account Chinese cultural values. Further research was carried out by Michael Bond and identified a fifth dimension in Chinese respondents that he called ‘Confucian dynamism’ [Chinese Culture Connection 1987].

The work of Hofstede was a landmark in cross-cultural research, and although it is now dated, and does not relate to higher education institutions, it is still of considerable relevance for academic leaders in large academic institutions. The primary research indicated that culture is extremely influential in relation to academic leadership particularly in relation to the leadership of academics and the development of teaching, learning and assessment strategies.

The primary research carried out in Hong Kong was too small to make any far-reaching conclusions. It does seem to indicate, however, that the work of Hofstede [1991] on na-
tional culture and the suggestions made by Deem [2001] on the local setting of higher education seemed to be particularly appropriate for the academics and students in the sample.

It is interesting to note however, that both universities have adopted a hierarchical bureaucratic organisational style. Hofstede’s work suggests that this is inappropriate in the UK culture, and Ramsden’s work suggests that new entrepreneurial structures are required to allow academic leaders to bring about change. This suggests that organisational design could be an interesting subject to research in the higher education context.

**Is the academic leader becoming more influenced by global factors?**

There is insufficient space or time in this paper to discuss the issues of globalisation of higher education in any depth. In the introductory section, an outline of the concept of globalisation was given. In this section, the balance of factors that have an effect on academic leaders are considered, to assess the influence of global factors in relation to those in the local and national context.

Five authors have written extensively in this area and these are reviewed in the next section of the paper to assess how important global factors are becoming to the academic leader in a middle management role in a higher education setting.

The first author, Marieke Van der Wende [2000] has suggested that education in general is currently trying to become more international in nature, rather than focusing on global developments. Clark [1998] and Chan and Mok [2001] argue that higher education institutions are becoming increasingly driven down similar paths as a result of global trends. At the other extreme Gibbons [1998] argues that higher education institutions should be firmly based on local cultures and traditions. Marieke Van der Wende [1997] has had a long career in research and practical application of international themes in higher education institutions.

The internationalisation of higher education is being fuelled by a series of interrelated factors which are leading academic leaders down the route of making the curriculum and staff more focused on international issues, rather than relying on student mobility to develop an international focus. This has been as a result of recent developments including the growth of information and communication technologies, the harmonisation of degree structures in Europe, and the internationalisation of quality assessment and quality assurance systems. She argues that the wide range of skills that are required by graduates who want to work in an international setting are best acquired through a combination of international content in the curriculum, the ‘international classroom’ setting and a strong emphasis on interactive and collaborative learning processes. [Van der Wende, 1997]

Marieke Van der Wende does suggest, however, that the internationalisation of the curriculum in higher education is the first indication that higher education institutions in general are trying to increasingly change the focus of their academic curriculum, which is underpinned by research programmes that have been developed as a result of international collaboration.

The primary research showed that both higher education institutions have tried to enter new markets by internationalising their curriculum. This result supports the word of Marieke Van der Wende.

Clark’s [1998] book relied on in-depth interviews that he carried out in five universities, in the UK [Warwick], the Netherlands [Twente], Scotland [Strathclyde], Sweden [Chalmers] and Finland [Joensuu], during 1997. He suggested that the move to globalisation has been as a result of national factors such as the increase in the diversity of the student body, an expanding professional labour market that is based on knowledge, and new fields of knowledge that can be argued are similar in a wide range of countries.
He refers to the concept of globalisation in rather vague terms, making claims that many of the interrelated themes that emerged during the research for the case studies in the book relate to the desire of higher education institutions to answer a ‘global problem of growing university insufficiency’. His case study reports which have been criticised for their lack of critical scrutiny [Deem, 2001] also suggest that there were many differences between the universities in the sample, in relation to their strategies and organisational form [Clark, 1998]. He concludes that universities are at the crossroads in terms of globalisation. They are increasingly being taken down similar paths towards internationalisation or globalisation, but are also affected by local conditions that remain very significant. Clark’s research [1998] has been criticised for a lack of methodological vigour [Deem 2001] but it has the advantage of having a range of institutions in the sample with different national identities.

There is still the question of whether research based on a European setting is of any significance in an Asian setting such as Hong Kong. This leads me on to the next commentators on the higher education scene in Hong Kong and China - David Chan and Ka-Ho Mok [2001]. These researchers are based at the Department of Applied Social Studies at the City University of Hong Kong, and so have direct experience of higher education in the Hong Kong setting. Their research has indicated that the global trend of ‘marketisation’ that has been influential in the decision making of social policies around the world, is becoming an increasingly important phenomenon in the Asia-Pacific region. The countries in the Asia-Pacific region are trying to improve the quality of their educational services so that they can remain competitive in the increasingly competitive global economy. Their research found that the Chinese government has concentrated on a programme of decentralisation to get local government to provide better educational services. Hong Kong has adopted a different approach by employing the principle of managerialism in order to enhance educational excellence. This is because of the special powers of the Hong Kong Special Administrative Region [SAR] Their paper concludes that although the movement to the marketisation in higher education seems to be a global trend, different governments are implementing their interpretation of what this means in different ways.

“We must not analyse ‘marketisation practices’ in education in these two places simplistically in terms of a one-dimensional movement from ‘the state’ [understood as non-market and bureaucratic] to ‘the market’ [understood as non-state and corporate]. Marketisation should not be treated as a simplistic notion of an undifferentiated universal global trend”

Chan and Mok [2001]

This leads neatly on to the final author Gibbons. [1998] His contribution to the book ‘The Globalisation of Education’ reflects on the ways in which universities are reacting to the trends in globalisation. He argues that universities are primarily national rather than international and although knowledge production can be carried out anywhere, it is the innovation that takes place locally in relation to the knowledge that is the most important factor. This could be interpreted as a ‘Think global, act local’ strategy which was originally suggested by the American business professor Theodore Levitt [1983]. The primary research did indicate that local factors have a powerful influence over academic leaders in middle management positions. Students have a particular need for locally adopted teaching, learning and assessment strategies.

To conclude, it does seem to me that although all the authors discussed do have opposing views on the nature of the factors that are affecting academic leaders, there does seem to be an underlying set of ideas that suggest that although globalisation is an important
theme, and there are a myriad of global factors that are shaping higher education policies and practices, it is the local factors that in the end are still the most influential factors.

It is important at this stage to reflect on the primary research that was carried out in Hong Kong to assess the types of factors that were considered to be important by the respondents. It is interesting to note that the work of Gibbons [1998] seems to be particularly relevant for the respondents in the research. Universities may have global aspirations in their quest to become more competitive, but it is there interpretation of these global factors into a suitable set of policies and practices based on local and organisational factors that is the most powerful, and one could argue the most influential. It really seems that the ‘Think global, act local’ theme has emerged from this discussion.

Conclusions

At the beginning of this paper, it was suggested that the good academic leader has had to react to an increasingly complex business environment and that global factors were becoming increasingly important in this world. A model was produced in an attempt to categorise the local, national and global factors that are likely to be influencing the academic leader in a higher education setting. It is significant that the major commentators on good academic leadership have focused on different factors at different levels of the model. McDade [2001] has focused on the personal characteristics of suitable candidates, and subsequent socialisation of the individual in a higher education setting. Contrast this with the work of Pritchard [2000] who states that successful academic leadership is more about organisational design with the adoption of a ‘managerialist’ approach, and Weil [1994] who concludes that it is all about the academic leader being aware of the complex business environment.

It has been interesting to assess the model of academic leadership in the light of the literature review and primary research in Hong Kong. It is of particular note that the work of Hofstede [1991] who claimed that there were fundamental cultural differences which had to be borne in mind during leadership activity, still appear to be very true in the Hong Kong setting. It is equally important for an academic leader to understand the cultural setting of their students to enable them to develop appropriate teaching, learning and assessment strategies.

The writings of Deem [2001] seemed to be particularly relevant in the Hong Kong setting, where an appreciation of local and national factors seemed to be more important than an understanding of the global context.

The institutions in the research are being driven down similar paths [Clark 1998, Chan and Mok 2001] but the way in which the institutions and by definition the academic leader is interpreting these factors is dependant very much on the local setting [Gibbons 1998, Primary Research 2001].

It may well be the case as Lie and Malik [1994], argue that it is the historical and cultural content of the country, such as Hong Kong which has had the most fundamental effect on academic leadership. The adoption of a managerialist and authoritarian approach outlined by Clark, Barry and Chandler [1996] could be a transitory phase in the long history of university development, or it could be here to stay as it becomes more deeply embedded. What is clear, is that it is the social relations and human culture within the university, and the national setting that is likely to affect the academic leader in his or her work. Until the research is done to investigate the complex relationships using new theoretical frameworks and methodologies, then it is certainly impossible to make any reliable suggestions about the future role of the academic leader and the contextual factors that will influence him or her in the future.
Bibliography

Chan, D and Mok, K [2001] Educational Reforms and Coping Strategies under the tidal wave of Marketisation: a comparative study of Hong Kong and the mainland. *Comparative Education*, Volume 37, No. 1 pp. 21-41


Deem, R. [2001] Globalisation, New Managerialism, Academic Capitalism and Entrepreneurialism in Universities: is the local dimension still important? *Comparative Education*. Volume 37 No. 1 pp. 7-20


McDade, S.A. [2001] Research paper given at Sheffield Hallam University, May 2001


Van der Wende, M. [1997] Internationalising the curriculum in Dutch higher education: an international comparative perspective. *Journal of Studies in International Education* [Fall] 53 and 72


179
Figure 1 Model of contextual influences on the academic leader in higher education

- Use of technology
- Organisational Culture
- ‘Old’ Universities
- ‘New’ Universities
- Management Systems
- Socio-Cultural Trends

International Setting (Globalisation)
Increased emphasis on leadership

National Settings
- Political influences
- Government direction and control

Organisational Context
- Use of technology
- Staff Development on Training

- Research
- Consultancy

- Academic Leadership

- Course Development
- Peer Development
- History
- Quality Monitoring Systems

- Student Body
- Widening Participation

Internationalisation
Of the Curriculum
- Use of Technology in teaching, learning, and assessment to transcend boundaries

Common themes and approaches in teaching, learning and assessment
- Past experience
- Socialisation in higher education
- Mentoring
- Development
- Political contacts

More mobile student/lecture cohorts
Academic leadership for the international development of hospitality and tourism management education - a case study of distance learning in Hong Kong

Kevin Nield, Centre for International Hospitality Management, Sheffield Hallam University, UK
Stephen Ball, Centre for International Hospitality Management, Sheffield Hallam University, UK
Susan Horner, Centre for International Hospitality Management, Sheffield Hallam University, UK

Abstract

The aim of this paper is to consider the role of the "middle" academic leader in the context of distance learning education in Hong Kong. To enable it to achieve its aim the paper asks who are middle managers? Should middle managers lead? And if they should lead are there any barriers that may prevent them from leading? This paper is unusual in that it considers leadership from a middle management perspective. Specifically it considers the leadership potential of two senior lecturers who have some responsibility for the management of distance learning courses. The paper includes interviews with these two middle managers in order to gain their insights in to their position and to question if they could or should lead.

We found that it would be both desirable and effective for middle managers to lead but there are barriers or constraints that prevent middle managers from leading.

We conclude the paper by addressing the barriers to middle management leadership and by making recommendations that may overcome these barriers. Specifically the paper recommends that if distance learning courses in Hong Kong are to be both efficient and effective it is essential that those charged with leadership are empowered to lead. This empowerment may have specific boundaries placed upon it.

Key Words: Academic Leadership; internationalisation; middle management; constraints on leadership.

1 School of Sport and Leisure Management, City Campus, Pond Street, Sheffield S1 1WB, UK
Tel:+44 114 225 5555; Fax: +44 114 225 3343; E-mail: k.nield@shu.ac.uk
Introduction

In this paper it is the intention to investigate the role of academic middle management as academic leaders in the higher education setting. In the paper this form of leadership is framed within the specific context of distance learning hospitality and tourism courses delivered in Hong Kong by the School of Sport and Leisure Management, Sheffield Hallam University.

To enable us to achieve our objective the paper will begin by exploring the nature and meaning of middle management. We will ask if it is desirable for middle managers to be leaders. If this is desirable then what are the barriers and obstacles to their leadership and how might these obstacles be overcome? We will conclude by making recommendations on the way forward in terms of enabling leadership within the context of distance learning provision.

Methodology

To enrich and contextualise the paper, we present our paper based on the introduction of our distance learning course in Hong Kong. As part of our research, semi-structured, in-depth interviews were carried out with the two academic "middle managers" who have the responsibility for distance learning provision in the School of Sport and Leisure Management, Sheffield Hallam University. The purpose of this research was to establish the opinions of these key staff as to how they see their roles, and specifically to investigate whether they see themselves as managers and/or leaders. It was also planned to investigate whether they would like to be given a leadership role if they only regarded themselves as managers. The paper will use the results of this research to indicate whether the middle managers considered if there were barriers to leadership, and if so, where the barriers to leadership may lie. It will also try to establish how, if at all, these managers may be enabled and supported to be leaders of the distance learning provision.

Note: The interviews were recorded, transcripts of the interviews were typed up and agreed as accurate recollections by the two interviewees. For the purposes of the paper and to prevent any confusion of terms that may arise the two interviewees will be referred to as X and Y.

Literature review

There is almost no literature that is directly applicable to middle management or leadership in the higher education context. Much of the literature is general. Literature specific to education is primarily concerned with the role of middle leaders in schools. It is, to a certain extent, possible to compare the role of the middle leader in schools with that of the middle leader in higher education. It is also valid to compare the function of middle management in industry with that of middle managers in higher education. Middle managers in schools for example have such functions as year leadership, subject leadership and careers guidance functions. These roles are comparable with similar functions within the School of Sport and Leisure Management. However, it is noticeable that while the term middle manager is used to cover a number of positions within schools that the vast majority of the literature on schools focuses on the Head of Department i.e. subject leadership.
Who or what is a middle manager?

Management literature has tended to concentrate on the role of the manager as the person at “the top”. This has also been the case until recently in education where there has been a concentration on the head teacher or senior management to the neglect of the role of middle management (Leask and Terrell, 1997). This is now beginning to change and there is now an interest in the role of the middle manager.

Who or what a middle manager is has been “loosely definable” (Leask and Terrell, 1997: p.1). A criticism of much of the literature is that it tends to state the role and/or functions of middle managers without attempting to define who, or what, they are. In an attempt to describe the complexity of middle management it has been described as the filling in a sandwich (McConville and Holden, 1999) or to quote from the “Grand Old Duke of York” it is “neither up nor down” (Spooner, 1989). In other instances authors assume that the reader knows what the middle manager does and merely uses the words with no further explanation.

The concept of middle management comes originally from the work of Henri Fayol (1841 – 1925) (Kennedy, 1991). He believed in a scalar chain or hierarchical principle of management in which everyone had only one superior and the direct and desirable consequences of this are that there are clear lines of command. Fayol thought these clearly defined lines allowed for transmission and unity of command.

Using this logic middle management is a sector of line management and implies a chain of authority from senior management through middle managers to first line management and on to the individual employee. Middle management then is those managers that are between this mass and the senior managers at the very top (Johanson, 2000). This type of analysis is consistent with that used within the literature concerning the school system to identify middle management.

The Fayolian model does not transpose very easily to the context of higher education at the School of Sport and Leisure Management for three reasons. First, within the School there is a very “flat” management structure. Flatter management structures make it such that the middle is difficult to identify (McConville and Holden, 1999). Secondly, school staff do not work in a traditional hierarchy. They work within a matrix structure where a member of staff may be both managed and manager, depending on their position in the hierarchy. The result of this is that middle management is relative to the level of view. Posts that may be identified as middle or even senior within the hierarchical chain of the School appear to be of a lower status than equivalent posts within the University.

For the purposes of this paper it is necessary to define middle management in the context of the School of Sport and Leisure Management. In this context middle management are those staff who have managerial and/or leadership responsibility and who are positioned between senior management and other staff. The middle managers interviewed for the purposes of the case study fell within this definition.

If we now consider the relationship of management and leadership within distance learning provision in the School, it is apparent that most if not all of the role of distance learning managers is management and/or administration. Much of what they are required to do is routine. Their roles require them to recruit students, arrange study schools and timetables, establish workload requirements, despatch materials and prepare for examination boards. All of this falls neatly under all of the management and administration definitions outlined by Hammond in 1997.
Should middle managers lead?

While it has been established that managers may lead the question to be answered is "is it desirable that middle managers should lead? If so, what would an organisation gain from it?"

Over the past decades perceptions of middle management have changed. It is now seen as dynamic and an agent for change. Research has shown that middle management would wish to make a more strategic input, have more control over decision making and have freedom to use their right to manage (Thomas and Dunkerley, 1999). Albrecht (1991) sees it as essential for the success of industry that there is a need to get better leadership from middle managers and that they must be empowered to enable them to lead. The so-called quality management gurus and other experts on quality have for some time emphasised the need for leadership at all levels of the organisation, top, middle and bottom (Juran, 1988; Collard, 1989; Oakland, 2000).

Early research in to middle leadership within schools indicated that middle managers did not see themselves as leaders (Earley, 1990). Bullock (1988) found that middle managers were more likely to be concerned with task centred roles that are more observable and safer. However, later surveys have indicated that there has been a shift in emphasis from administration to management to leadership (Wise, 1997). Within schools the leadership role of middle managers is seen as key to the improvement of schools. The middle manager may be more important than the school head in bringing about improvement (Wise, 1997; Lunn, 1998).

Middle management is now regarded by many as having important leadership functions in both industry and education. These functions are

1. Middle management can convert company and organisational strategies in to operational activities. It is able to fine tune the overall direction and fit it into the real world (Jackson and Humble, 1994). Further to this middle management is able to process information and to translate missions and visions into aims and objectives (Dixon, 1995a). This role is echoed within schools and universities. Subject leaders are seen as translating the policies and perspectives of senior management and taking the lead in their implementation (Busher and Harris, 1999). This can be the same within higher education where visions and missions of senior management are broken down and contextualised by subject and programme groups that are governed by middle managers.

2. Middle managers may act as role models. Middle managers are an untapped resource that are not barriers to change and improvement but are leaders of it. (Dixon, 1995a; Dixon, 1995b; Jackson and Humble, 1994). Middle managers within education are able to create a departmental culture and encourage staff to create a group identity (Busher and Harris, 1999).

3. Middle managers have operational wisdom in that they have learned the hard way. They know what works and what does not. Within schools middle managers are charged with the responsibility of improving the performance of both staff and students. Research indicates that middle managers are as important in this respect as headteachers (Busher and Harris, 1999).

4. Middle managers have a leadership role in that strategy not only comes down to them to translate but it is also may be made in part by them. Middle managers are seen to have a legitimate role in shaping the organisation (Currie, 1999). Middle managers may play a part in formulating strategy and acting as a conduit through which strategy rises through the
organisation. This may be at least partially recognised within the School of Sport and Leisure Management as middle managers already play their part in developing action plans that are concerned with establishing improvement and direction.

5. Middle managers may act as entrepreneurs. They are in a position which is close to the customer they should be aware of her/his needs. They are in a position to innovate and to change (Geisler, 1993; Dixon, 1995b). This is particularly appropriate to the distance learning managers. Both are close to the students and are aware of their needs. In addition both are close to the markets and to information fed to them by the School’s agents who are responsible for marketing the courses in Hong Kong. By virtue of their roles they are in a position to innovate and to lead.

It was considered important in the research to consider the reality of the work of the distance learning managers. It was found that the nature of their work did not require them to lead all of the time. More simply the majority of their work is administration and management. However, there is a leadership role that the middle managers can play and in this we agree with the views of Middlehurst (1993) and Kotter (1988, 1990). The commercial and the academic world are faced with great changes in a fast moving world which will require new methods of both management and leadership. The distance learning managers are perfectly capable of carrying out the five aspects of middle management leadership that have been outlined. The majority of their time is currently spent on routine administration and management. The School would obtain more value if they would allow their middle managers to lead when the situation demands it.

**Constraints on the leadership**

The previous section has made the case that it is both desirable and to the benefit of an organisation that middle managers take on a leadership role in addition to the managerial/administrative responsibilities. In their roles as managers, the middle managers will plan and co-ordinate to ensure that courses operate efficiently. They will continue to recruit students, organise study schools, timetable, and establish workload requirements, despatch materials and prepare examination boards. In their role as leaders the middle managers will be responsible for direction setting, inspiring and motivating the development of the courses and ultimately the organisation. The distance learning managers will be responsible for taking the courses in to new markets and will lead the development of the courses to fit these new markets. They will have to develop and implement strategy to achieve this. They will have to motivate and inspire colleagues to follow their lead to achieve their new goals.

While both X and Y expressed a desire to lead both said that there are certain obstacles that make leadership difficult. What then are the obstacles or constraints that may prevent middle managers from leading? In attempting to answer this we will now turn our attention to academic theory, research in schools and research undertaken in order to enrich and provide links for this paper.

Several constraints to academic leadership may be put forward. The first five are based largely on the work of Middlehurst (1993), with contributions from Ramsden (1998) and Hodgkinson (2000). The remaining factors are based on empirical research in schools carried out by Brown and Rutherford (1998) and also our own research.
1. Values (culture)

Values is the term used by Middlehurst (1993). A better description might be culture. Culture is used in this context to describe the way in which the organisation works. Middlehurst examines the forces that shape academic culture and make leadership a difficult function to undertake in higher education.

He believes that at the centre of the traditional academic value system is a set of ideals. These ideals comprise academic freedom, critical reflection, rationality, democratic participation and autonomy. These ideals detract from any formal hierarchy and make leadership in academia difficult.

Ramsden (1998) adds weight to the opinion of Middlehurst. He believes that academic and leadership cultures within higher education clash. Academics who have ambitions of leadership are looked upon unfavourably by their peers. Collegiality and decisions made by consensus, autonomy, academic freedom and professionalism are all regarded as challenges to leadership that may enable a culture that is anti-leadership (and anti-managerial) to endure.

In these circumstances leadership can only be exercised on the basis of legitimate authority and influence and the willing compliance of other members of the School. Leadership is defined by the ability to convince and persuade others to act on the basis of greater knowledge or competence, reasoned argument and fairness.

Middlehurst's values do impact upon leadership. In relation to distance learning and most other leadership roles in higher education they will impact upon the style of leadership not on the ability to lead. If the distance learning managers took on leadership without formal authority their leadership style would have to be able to convince others to follow them through reasoned argument and persuasion.

2. Structure

Hodgkinson (2000) perceives organisational structures as a barrier to change. As he sees it organisational structures influence the perspectives of individuals and it is the individual's position in the hierarchy that is equated to their perceived power to influence decisions. The structural features of universities are possibly more complicated then those imagined by Hodgkinson and as a result place major constraints upon leadership. Middlehurst (1993) says that there are three facets of academic (organisational) structure that stand out in constraining leadership. These are the dual-hierarchy of academic and administrative authority, the use of part-time decision-makers, and the diffusion of authority within the university.

3. The macroenvironment

This term is used to cover the economic, social and technological and, particularly, the political environment in which Universities work. Universities are subjected to more and more public scrutiny of their operations and finances so these levels of scrutiny may lead to caution. This caution may cause leadership not to be devolved by senior managers.

Ramsden (1998) believes that the political realm of the macroenvironment e.g., poor pay and falling public esteem has made academics both bitter and cynical. The result of this is that new initiatives are difficult to drive and the academics in general are difficult to lead.
4. Followership

Leaders within higher education are not inevitably in formal leadership positions (Ramsden, 1998). Within this study the leader/managers in question are appointed to their positions. In the current system they would not be recognised as leaders by other members of staff.

Additional obstacles resulting from the research undertaken with the distance learning managers are as follows

1. The management style of senior management. Some of the senior managers were thought to be unable to delegate authority to the respondents. As a consequence every decision of theirs had to be ratified by more senior managers. This lack of power to make a serious decision severely hampered their potential as leaders. It was believed that those who delegated power saw delegation as risky and for this reason senior managers would not delegate power. While this may be an obstacle to leadership both X and Y gave the same solution. Specifically, this was that power should be delegated to them but that the “boundaries” of it should be made clear. In this way no one should go beyond her or his remit and senior managers would lose any fears that they may have of people leading beyond their authority.

2. Leadership was seen by one of the respondents, Y, as commensurate with grade and that any real leadership began at Principal Lecturer grade and above. Y said “I think leadership goes with grade, but you’re also looked at differently”. Grade was also seen as establishing the authority to lead. While those on higher grades may themselves dispute this, the lack of a higher grade was seen as an obstacle to leadership. This view possibly accords with the view that position in the hierarchy gives a perceived status (Hodgkinson, 2000). It is difficult to reconcile this view with the reality of higher education where insufficient senior posts exist with which to reward all leaders.

3. In the interviews that were carried out with the distance learning managers Y did not see himself as a leader. X did not see himself as either a leader or a manager. X did not see himself as a manager as he had no responsibility or authority in relationship to resources. As he put it he had neither finance nor personnel. His function, as he saw it, is to act as a co-ordinator. However, both X and Y felt that they could, and would, like to lead. Both though that this would enrich their working lives and improve the quality of student experience. However both felt that there were obstacles that prevented them from leading.

4. Both respondents agreed with Middlehurst stating that academic values impacted upon leadership. However, in relation to their distance learning role and most other leadership roles in higher education academic values impact upon the style of leadership not on the ability to lead. If the distance learning managers are to take on leadership they would have no formal authority. Their leadership style would have to be the ability to convince others to follow them through reasoned argument and persuasion.

5. Both managers felt that they had no legitimate authority to direct a course because they had no legitimate authority or leadership responsibility in this area. This view was also expressed by X in relation to his dealings with administrative staff:

“I’m asking people to do things all the time, but I’m relying on goodwill.” “I mean I can’t go and say to Z – drop everything you’re doing, I want this done today.”

Both respondents saw diffusion of authority as bureaucracy that was quite often faceless. An entity with which they had no direct dealing but which could be a major hindrance
to their leadership as they could be usurped by the bureaucracy. Concerns were expressed by X about the power of the central university departments:

"I haven’t had anything to do with the Centre here, but I just get the impression that (the centre) has very close control over everything and they’re not devolving things."

Interestingly little was said by either respondent about their ability to lead. Neither saw their lack of training as a major obstacle. One of the managers, Y felt ill at ease in leading an initiative to convert distance learning materials into electronic form. X felt that the nature of his appointment and the lack of a job description made leadership difficult due to a lack of necessary expertise in the area.

6. The two interviewees gave other reasons that impinged upon their ability to lead which were not found in the literature. First, the management style of senior management was thought to be lacking. Some senior managers were thought to be unable to delegate authority to the respondents. As a consequence every decision of the distance learning manager had to be ratified by more senior managers. This lack of power to make a serious decision severely hampered their potential as leaders. It was believed that those who delegated power saw delegation as risky and for this reason senior managers would not delegate power. While this may be an obstacle to leadership both X and Y gave the same solution. Specifically, that power should be delegated to them but that the “boundaries” of it should be made clear. In this way no one should go beyond her or his remit and senior managers would lose any fears that they may have of people leading beyond their authority. This view possibly corresponds with the view that position in the hierarchy gives a perceived status (Hodgkinson, 2000). It is difficult to reconcile this view with the reality of higher education where insufficient senior posts exist with which to reward all leaders.

The next step

If the middle managers within the distance learning provision are to lead then they must be required to establish direction and initiate change. The nature of their work places them in a unique central position between senior management, agents and the students. They should be aware of problems and weaknesses that need to be addressed as well as new opportunities and markets. In this way they may become agents for change who lead in deciding direction and policy.

However the evidence presented in this paper indicates that these benefits are not accruing, and middle managers do not consider themselves to be leaders. The reasons given for them not taking the lead was not that they were incapable or unwilling to take the lead. On the contrary both the literature and research suggests that middle managers are a valu-

---

1 The majority of the distance learning provision within SLM resides within the Centre for International Hospitality Management. Over the past decade this has been the School’s main avenue for expansion has been in overseas markets through distance learning delivery. With this in mind the School of Sport and Leisure Management entered the Hong Kong market in 1996 with postgraduate courses. While most of these courses operate successfully it was necessary from time to time to make adjustments to courses and teaching to enable them to operate more successfully. By their very nature these courses needed to be responsive to the different needs of their students and of the staff who teach on the courses. The leadership of the courses was under the direction of a Programme Leader who had two senior lecturers who had direct management responsibility for the courses.
able resource who could and should take the lead. What prevented these managers from becoming leaders were constraints and barriers to their leadership.

Within the paper several constraints and obstacles to leadership have been identified. Not all of them are applicable to the managers of the distance learning provision. If middle managers of the distance learning provision within the School of Sport and Leisure Management are to become effective leaders then these barriers must be removed and the conditions for leadership must be created.

Structural barriers, particularly the confusion that surrounds the dual hierarchy and the diffusion of authority must be eradicated, lines of authority must be clear. Strategic priorities must be set, known and adhered to by everyone. Divergent interest groups cannot be allowed to deflect strategy and change direction. Staff placed in to leadership roles must be granted the professional development and training that their positions require. Senior managers must consider their management style. They must delegate the power to lead within accepted and known limits. Importantly staff must be enabled to lead and be recognised as leaders. Academic values and cultures that impede leadership must be changed so that leadership itself is regarded as a necessary and valued commodity.

References

Albrecht, K., (1991), Service within: solving the middle management leadership crisis, Illinois: Business One


Bush, H. and A. Harris, (1999), Leadership of School Subject areas: tensions and dimensions of managing in the middle,


Training principles and training methods in tourism

Liljana Prangoska, Faculty of Tourism and Hospitality - Ohrid

Abstract

Under favourable circumstances, training has the important dual function of utilization and motivation. By improving the employee's ability to perform the tasks required by the company, training allows better use to be made of human resources: by giving employees a feeling of mastery over their work and recognition by management, their job satisfaction is increased.

The psychological principles of training are based on design: the motivation of the trainee is particularly important and is influenced a great deal by the design of the training program and the methods used.

Key words: Training principles, training methods, tourism, motivation, attitudes, skills, knowledge.

1 Liljana Prangoska, Faculty of Tourism and Hospitality, 6000 Ohrid, Macedonia, phone: +389 46 262147, fax: +389 46 262281, e-mail: ftu@uclo.edu.mk
**Introduction**

Training contributes to the better utilization of human resources - complete utilization of their abilities and knowledge and positive motivation. Employees experience the feeling of having control over their work and of receiving recognition for their performance from their management. The main benefits from administering training in tourism refer, above all, to an increase in productivity and to quality improvement, which, in turn, lead to a reduction of losses and to the elimination of improper operation. Training at the same time enables the better adaptability of employees to new methods, and leads to independence in work, a reduction of work accidents and absence from work, and creates an atmosphere of working with satisfaction.

In order to assure quality and productivity in tourist operations, high motivation leading to gaining new knowledge, organization, diligence, consistency, persistence, trust in one’s own worth and continuity are needed, rather than anger coming from one’s superior position and taking punishment measures.

Training helps build the natural and immediate interdependence of quality and motivation. Training administered in tourism sets up a winning team, a team constantly learning and gaining new skills in their work, turning work into real satisfaction.

**Training Principles**

The basic principles of training in tourism are the following: Training Goals; Training Reasons; Systematic Approach to Training; Checking Individual Training Needs; Estimation of Long-term Training Requirements; Determination of Training Required, bearing in mind the advantages and disadvantages; Preliminary Estimation of Training Benefits; Preparing Training Administration; Preparing Training Charts and Training Responsibilities Within a Tourist Enterprise (Figure 1.)

Determining the basic training methods in tourism is directly dependent on the contents implemented in the set training principles.

The first step is to determine the training goals. This will allow an evaluation to be made of the importance of the administered training through the results achieved - they must surely be higher than those before training.

The second step is setting the reasons for administering the training: installing new equipment or techniques; change of work methods; realizing that the performance is inadequate, lack of employees with adequate skills; improvement of employees, improving work quality, etc.

The third step is the systematic approach to the training. Without having a logical systematic approach, training could become useless - training should be carefully planned and supervised. The systematic approach takes place according to the following sequence: (1) Analyzing and defining work; (2) Setting up performance standards; (3) Studying the employees planned for training - in order to check if they satisfy the set standards; (4) Determining the performance level to be attained if training proves to be successful.

The fourth step consists of checking the training needs of each individual. Once the training needs have been determined, the individual training needs of each employee or of a group of employees engaged on the same work should be looked into.
The fifth step consists of estimating the long-term training requirements - many training programs may be expensive and useless if precise plans are not made on time. This estimation is usually carried out for the entire organization and represents a part of the labour needs planning. This includes defining the training needed in future, the time training begins and the number of current or newly engaged employees that should be trained.
The sixth step involves determining the type of training to be administered: either on-the-job training or off-the-job training. In fact, the methods of work depend on this determination. On-the-job training is carried out in normal work situations, while off-the-job training takes place away from normal work conditions - in training centers or in educational institutions for training trainees from various organizations.\(^1\)

The seventh principle of training in tourism is the preliminary estimation of the training benefits. Training costs are calculated and compared to the company’s financial benefits from employees’ improved performance. This means that evaluation and validation have to be made in order to estimate the benefits that are most frequently expressed in financial terms.

The eighth step entails preparing training administration. In most cases they are the so-called Training Boards. A training board consists of an independent chairperson, of members representing both employees and employers in the tourist industry, and of members of educational services. The main task of these boards is to create training conditions for employment and/or improvement in various spheres in tourism. They provide training courses, initiate research and publish recommendations.

The following training principles are the training charts, which are primarily intended for unemployed persons, and are implemented through co-operation with the Government and tourist organizations. These are the so-called youth training charts and employment training charts. Their main aim is to assist the trainees in gaining a recognized qualification, in attaining knowledge about a certain job, in achieving skills for successful communication, in building their self-awareness and problem solving skills.

The training principle that not only binds all previous principles but also provides safety for their implementation is the training responsibility within the tourist enterprise. The main responsibility for planning and carrying out training lies with the general management, the company’s top management. It is the management that establishes the general training policy that meets the company’s requirements. Low-level managers (line managers) are responsible for the training of their subordinates and are usually personally involved in the training. The training responsibility further spreads to the training officials who are obliged to inform the top management of the training capacities, maintaining contacts with the educational institutions and the Training Boards.

Trainers who are in direct contact with trainees are obliged to give their objective appraisal of the attained skill level.

Consultants engaged by the company to study the training needs and outline guidelines in respect of the way of administering the training may also be held responsible.

**Training Methods**

Training in tourist operations, the same as in other business operations, is based on psychological principles. Both planning and carrying out training depend on the methods used. The first step in designing the training course is fulfilling training requirements in respect to attitudes, skills and knowledge (Figure 2).

Figure 2. Schematic Diagram of Basic Training Methods in Tourism

<table>
<thead>
<tr>
<th>Attitudes</th>
<th>Skills</th>
<th>Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experience through work in groups with identical attitudes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training on-the-job with a person of high authority and high qualities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Out of work training with a group of employees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exercises with given roles off-the-job (Improvising given actual work situations)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>O - groups as an off-the-job method. Persons are trained (not more than 12) through discussions regarding their personal behaviour</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&quot;Sitting next to Nelly&quot; method - Observation by an experienced worker</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OVI-TWI method for operator training. Begins off-the-job, later on transferred in actual work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skills analyzing is used for training professions requiring high degree of skill and co-ordination of senses and body movement.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detection method is used when re-training older workers. This method offers a challenge in which the trainer is passive and insists that the trainee solves the problem by himself</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training by demonstrating certain activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal lectures by senior employees or technical college instructors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting popular and successful tourist enterprises</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Real Work simulation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auto-instructing requires high intelligence and persistence from trainees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Programmed learning, each trainee works according to his/her degree of gained knowledge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Method using computer aided training (SVT), consists of several exercises mastered individually</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Method of interactive video-clips, simulating communication situations where participants portray various characters of workplace environment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Author's own illustration)
The schematic diagram clearly outlines that training administered in tourism, due to its complexity, should use a variety of different methods which will primarily influence changes in attitudes, skills and knowledge of the trainee in a positive direction in respect of their being brought up to date and through the expansion of their knowledge.

The conclusion of this paper emphasizes the necessity of respecting and applying the training principles and using adequate training methods. The development of tourism may not be achieved without applying the training principles and training methods that have already been implemented in the tourist management of developed countries. The financial benefit of their application is obvious in many of the countries that have developed tourism. The dual function of training should always be kept in mind: utilization and motivation.

Improving employees' skills changes their attitude to work – they gain both the feeling of having control over their work and receive recognition from their management, which enables permanent growth in their satisfaction and motivation concerning their personal improvement and the improvement of the tourist enterprise.

**Literature**


Some of the more important methods of training and staff development as a factor for improving operations in a tourist enterprise

1Lidija Simončeska, Faculty of Tourism and Hospitality

Abstract

Human resources in the tourist industry have a very specific character. They establish direct contact with consumers - tourists in the moment of the creation and consumption of tourist products. Therefore, it is very important for all tourist enterprises to select reliable persons as managers and top managers, who are to be further trained and developed through permanent training and developing processes.

This paper deals with the more important methods and techniques of executive training and manager staff development. This division refers to the exact training place, which recognizes:
- On-the-job training, or
- Off-the-job training

The training of the most recently employed staff will be differentiated from the training of the existing staff of the enterprise.

Key words: human resources, training, training techniques, staff development

1Lidija Simončeska, Ph.D. Faculty of Tourism and Hospitality, St. Kej Maršal Tito Nb. 95, Ohrid 6000, Republic of Macedonia
Tel./Fax: 46 262 147, e-mail: fluoh@freemail.org.mk
1. Introduction

With its dominant role in creating a tourist product, the human factor has a decisive role in the operation of a tourist enterprise. Making a benefit of their own abilities, the available capacities and natural values of a tourist location, tourist workers plan, create and design a tourist offer, create and control the quality of tourist services, manage the work processes, and make decisions. Both the quality and productivity of their work, and the economic benefits they gain, depend on employees’ skill and ability. This especially refers to lower level tourist staff in the enterprise’s organizational structure since they are the ones that most frequently make direct contacts with the guests.

The opinion that the formal education gained and the individual’s practical experience were sufficient to qualitatively carry out work tasks prevailed for a rather long period in the sphere of the tourist industry. The need for, and importance of, staff training has not been realized. Such an assumption brings into question the quality of the offered services, the image of the tourist enterprise and its involvement in international tourist operations.

The need to both recruit competent employees for jobs and their permanent training and the improvement of their skills and knowledge are nowadays becoming more relevant. The training system allows for each employee to increase work results, and to increase the business efficiency and effectiveness of the enterprise as a whole. Training gives employees the opportunity to enhance their skills which, on the other hand, gives them self-esteem, satisfaction and confidence in carrying out their work assignments. Training is carried out using various methods and techniques. This paper explains some of the more important methods and principles that may be entirely implemented in the tourist industry.

2. The Need for Training in Tourist Enterprises

Training is a process in which employees of a tourist enterprise are trained to carry out their workplace activities. It consists of various procedures and activities that stimulate the staff’s potentials and the development of new qualities. Applying various techniques and means allows employees to gain the work knowledge and skills required, affecting their attitudes and behavior in the process of creating and selling tourist services at the same time. Training results in increases in the individual productivity of each tourist worker. The training of staff in tourist enterprises is an investment in individuals and is an essential issue for successful business functioning.

It was long ago when work itself taught the employee how to work and behave in the ‘production’ of tourist enterprises.

The development of the tourist industry under the current conditions of market globalization and strong competition imposes the need for a permanent process of staff training in tourist enterprises. Training takes on the role of improving work capabilities, as employees are required to achieve perfection in carrying out their assignments.

The training process includes both the technical staff that ‘create’ tourist services, and management at all organizational levels. When speaking of the training of technical staff, the term training is used. The training of managers and making their skills professional is considered to be the development of staff.
The need for the training and development of staff in the modern tourist industry, as reported by Miller et al. (1998), arises from:
- the development of the science, technical and technological advancements and their implementation in tourism and hospitality;
- the change of other segments of the environment;
- the change of tourists’ and potential tourists’ expectations
- the incidence of new tourist services on the market;
- the change in the type and design of the material elements of a tourist product;
- the change of the management system;
- the need to improve the quality of the present services;
- the need to differentiate the enterprise from the competition;
- the market supply of labor in accordance with qualifications;
- the internal employee situation, such as number and structure of employees;
- the development of a system of values within the enterprise and the obligations for human resources development;

Having in mind staff training and development in tourism, training should be administered for:
1. newly engaged employees, structured as orientation and instruction;
2. existing staff, structured as repeated training, i.e. re-training.

### 3. Some of the More Important Training Methods and Techniques for Staff Development in Tourist Enterprises

The process of learning is the essence of training as a form of communication between the trainer and the trainee. Various ways exist to carry out this communication successfully. The relation between theory and practice has developed many methods and techniques for staff training. A number of them have found suitable applications in tourist enterprises. According to some authors (Cole, 1998; Dessler, 1994; Miller et al., 1998), techniques have been developed for the training of technical staff, and some for the training and development of management. Some authors (e.g. Graham, 1994) treat techniques depending on their application, i.e. whether they are intended for acquiring attitudes, knowledge or skills. Training can be carried out either on-the-job or off-the-job. The following table gives the most significant staff training methods and techniques for the tourist industry.
<table>
<thead>
<tr>
<th></th>
<th>Training of Technical Staff</th>
<th>Training Managers</th>
<th>Training of Technical Staff</th>
<th>Training Managers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attitudes</strong></td>
<td>1. Coaching method of “attaching” the trainee to an older employee with suitable attitudes and qualities to influence others to accept his/her attitudes</td>
<td>1. Understudy coaching method of manager</td>
<td>1. Techniques of leading discussions regarding theoretical cases in order to emphasize the attitudes required</td>
<td>1. T-group method</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Personal assistant method</td>
<td>2. T-group method for examining trainees’ behavior</td>
<td>2. Role-playing method</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3. Behavior modeling training method</td>
</tr>
<tr>
<td><strong>Skill</strong></td>
<td>1. Job instruction training method, showing the subsequent procedures required to carry out an operation</td>
<td>1. Job rotation is a management technique of expanding managerial experiences and skills</td>
<td>1. Method of detecting the basic work principles and proper methods for carrying them out.</td>
<td>1. Case study method for training managers by giving individual diagnosis and analysis to an organizational problem</td>
</tr>
<tr>
<td></td>
<td>2. Special assignment method, enables the gaining of skills and superior experience in dealing with current problems</td>
<td>2. Junior boards method, intended for training young middle-level managers by giving suggestions for creating a business policy of an enterprise.</td>
<td>2. Method of exercises and repeating. It is applied for activities for which performance perfection is required.</td>
<td>2. Management games technique, where managerial teams make decisions and conclusions in shared competition in simulating real-life enterprises.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Action learning method for the training of individuals through preparing projects</td>
<td>3. Simulation training method</td>
<td>3. In-tray method, where the trainee is required to act properly with the documents submitted randomly.</td>
</tr>
<tr>
<td><strong>Knowledge</strong></td>
<td>1. Method of demonstration and presentation, followed by simulating trainer’s activities by trainees</td>
<td>1. Coaching/understudy approach as a method of training the entire managerial team</td>
<td>1. Formal teaching method</td>
<td>1. University-related programs including activities for improving managerial knowledge in the fields of leadership, planning, supervision, etc.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Method of auto-instruction</td>
<td>2. Visiting other organizations and businesses that will be communicated with in the future.</td>
<td>2. Outside-seminars and courses in various management fields</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3. Method of programmed learning</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>4. Electronic media-based training (multi-medial training)</td>
<td></td>
</tr>
</tbody>
</table>

(Source: Author’s Own Illustration)
On-the-job training is administered using the existing tools, equipment, documentation and material at each workplace permanently, no matter whether training is carried out or not. It is applied for individuals and small groups of trainees. Unlike these, the methods used for training staff off-the-job use special simplified tools and equipment, while the training itself is carried out in other work premises, training centres or universities. These methods achieve the greatest effect when used for training medium-sized and large-sized groups.

The coaching/understudy method is used for training both technical staff and management. It is considered as on-the-job training. As shown in the table, this method has a wide range of applications in order to allow trainees to achieve the knowledge and attitudes required for creating an attractive high-quality tourist product. The understudy method is performed by an experienced worker or supervisor with personal qualities, skills, and adequate attitudes.

The method of training with instructions during work is intended for training technical staff in order to strengthen their technical skills. Trainees are trained to understand the structure and sequence of procedures that should be performed while carrying out work operations. This method gives a sequential list for training trainees.

The method called special assignments is very similar to the previous one. It trains service providers in the necessary skills for resolving current problems.

In order to achieve contemporary technical knowledge, tourist workers are trained with the so-called demonstration and presentation method. This method has a particular role and importance in training tourist services providers and is a unique way for the trainees to understand specific tasks and how they are performed in the field of hospitality. Training is carried out by a trainer who gives explanations using presentations and demonstrations, as well as work instructions. This methodological approach to training provides fast, direct, inexpensive and bi-directional communication between the trainer and the trainee. The trainee has the opportunity of repeating the difficult operations and of asking questions until he reaches a high level of knowledge. This method establishes a close, friendly relationship during the training process and gives the possibility for the trainee to participate in eliminating possible errors. After the instruction has been carried out, the trainer shows interest in the knowledge the trainees have gained, expressed by asking questions.

Since employee attitudes are hard to change over a short period of time, discussions are used as a technique where groups of trainees may and should take part in analyzing certain theoretical, imaginary cases. The purpose of this study is to emphasize the relevant attitudes that should prevail during work. It should be taken into consideration that theoretical cases, due to their imaginary nature, do not often cause an emotional reply from the trainees. Theoretical cases are usually prepared bearing in mind the problems trainees face.

The T-group method affects the attitudes and behavior of the technical and managerial staff. Graham (1994) states that "Training is carried out in groups of 12 trainees and is aimed at actualizing, through discussions and analysis, the behavior of the group participants". The purpose of this method is to reveal what the groups think for each individual, and to point out the importance that each individual’s behavior has in the group process.

Within the framework of the methods administered for enhancing technical staff skills, a special role and importance should be given to the discovery method, which can be applied particularly successfully in the process of re-training employees. Its essence consists of discovering the basic work principles and the methods for efficient achievement by the trainee. The passive role the trainer has in this method should be pointed out. He gives very moderate instructions and leaves space for the trainees themselves to draw conclusions for the questions asked.
Simulation is a training method in which the work or problem that the trainees should solve is simulated. They use materials and documents that are identical and are replacements for those to be used in real work. This method simulates the workplace and, according to Graham (1994), is therefore considered as a method that:

- ensures lower costs compared to real work situations,
- provides safety at work for operations carried out in risky situations,
- creates better training and learning efficiency since trainees may follow the training simultaneously.

The audio visual technique may be a rather good technique for carrying out the training of tourist workers. Johnson (1998) reports that it is of significant importance:

- when it is required to present the way of performing a given operation and there is a need of multiple repeating the procedure before a group of trainees,
- when operations and situations that can be demonstrated either in classic lectures or on-the-job are explained,
- when training is administered at a larger territory level by one, i.e. a group of trainers".

In modern conditions, a widely-used technique is ‘tele-training’, in which the trainer uses demonstration, instructions or explains through the internal TV network. It is most commonly used when training hospitality staff in hotel chains or tourist staff in other organizational forms that, in their organizational structure, have detached units.

From the methods through which technical staff gain knowledge, and which are listed in the table, special attention will be given to the methods of teaching, programmed learning and training via electronic media. Formal teaching is one possibility of training staff and has the advantage of enabling a larger group of trainees to gain knowledge in an easy and simple way. The effects communication can provide through speech are utilized and, above all, the possibility is exploited to attract trainees’ attention and interest. Teaching may be organized either in or out of the enterprise, in training centers or universities.

Programmed learning is a method of individual systematic acquisition of knowledge. The work assignment is divided into several subsequent operations. The trainee learns the operations in a way that he or she moves to the next operation after having learnt the previous one. Instructions may be carried out either through teaching books, teaching machines (diskettes, picture slides) or a computer. After teaching is completed, the trainer asks questions in order to determine the trainee’s degree of knowledge. This method allows the trainees to become involved in discussion with the trainer.

Dessler (1994) states that multi-medial training includes the following forms:

- training through the Internet network which gives unlimited information in the field of hospitality and tourism,
- interactive computer training based on computer software packages. These packages consist of numerous exercises for self-examination and establishing continuous interaction between the trainee and the program,
- training through audio cassettes, video cassettes and CDs. This training technique is based on the senses of hearing and/or sight and the three-dimensional presentation of activities and situations. It gives the possibility for the activities to be repeated, stopped or presented in slow motion, in order to give emphasis to the critical points".

Among the more interesting methods used for training managerial staff, besides the coaching/understudy method, are the following:
The personal assistant method, used for developing the attitudes of top management. It is based on engaging an instructor - training assistant of future top-level managers.

The method of auto-instruction gives trainees a program of assignments that leads them through the enterprise and requires them to provide the necessary information, either derived from managers or from documentation. Trainees give the trainer periodical reports of their progress.

The method of action learning is used for training middle-level managers. During work-time, the manager prepares projects for some activities, in which he analyzes the problem, formulates alternative solutions, implements the solution and monitors the results achieved.

Job rotation is one of the techniques used for improving managers’ conceptual skills, human resources management and technical skills. It is widely used for training newly engaged young managers. The trainees rotate their jobs in order to become acquainted with the problems their colleagues meet. The intensity and duration of each rotation depends on the conditions the enterprise has and the speed of their learning.

Management games are an especially interesting and attractive technique for improving managerial skills administered through the organized competition of managerial teams consisting of 5-6 managers. These teams compete in making decisions and managing real-life, but computer-simulated, companies in a simulated market.

The case study method is based on a given organizational problem that is independently analyzed by the trainees, making their own decision. The trainee exposes his or her decision before the others, who also offer their own decisions. Matching suggestions and standpoints regarding current problems increases trainees’ skills and experience in their decision-making.

Behavior modeling is a manager behavior and attitude training technique usually used for supervisors and middle-level managers. Managers are given the appropriate managerial technique and are asked to make decisions in a given, simulated situation. Each properly made decision is supported by the trainer. The manager making the proper decision is encouraged to apply the gained skills in practice.

When selecting one or more training methods, some criteria should be taken into account. Cole (1998) considers the following criteria as the most significant:
- the kind of training required;
- the set goals of the training process;
- the number of trainees to be trained;
- the number of trainers available and who may be made available during training;
- the time available for training, and
- the available budget.

Conclusion

This paper treats some of the more important methods and techniques for training staff engaged in the tourist industry. The methods are classified depending on:
- the place where training is carried out, i.e. on-the-job or off-the-job training;
- whether the methods used help in the gaining of attitudes, skills or knowledge; and
- whether technical or managerial staff is trained;

The number and the methods and/or techniques applied depend on: the kind of training required, the set goals of the training process, the number of trainees to be trained, the number of trainers available, the time available for training and the available budget.
Literature

The use of the case method for effective education and business training

Đurđana Ozretić Došen, University of Zagreb

Abstract

The case study method in teaching business has become an integral part of modern education. This paper synthesizes views of what a case method is, and what the outcomes might be of case studies as a method for effective education and business training.

A case study presents a model of real life which serves to facilitate decision-making practice and to improve the managerial skills of students and practitioners of different business disciplines. Case studies can be used in many ways. Their use will be shaped by the teacher's own view of the subject and the role of cases in the teaching, by the instructor's style and the expectations, backgrounds and abilities of the students.

Often the primary objective for using cases in teaching business is to develop ability in analysis and thinking. However, research results related to the effectiveness of the use of the case method show that cases are most effective as a means for developing communication, interpersonal skills and integration.

Criticism that can be made may not be intrinsic to the case method itself, but to its poor implementation. Effective use requires clear specification of objectives, great attention to situational variables, and the use of review and self-assessment.

The interactive case method in tourism education can be used as an effective pedagogic tool for developing practical solutions to management problems and for the pragmatic application of certain theoretical principles.

Key words: case method, tourism education
Introduction

Literature reveals that a variety of teaching/learning methods make sense in business education – and this is irrespective of the level of the educational program, whether undergraduate, graduate or executive (O’Cinneide, 1998).

The case method is familiar to business educators and their students as a teaching tool. Many business schools, both European and American, use cases to allow students to be emotionally involved and learn action-related analysis of real, complex situations (Christensen and Hansen, 1987; Perry, 1998).

Tourism employers often recruit non-tourism graduates (i.e. business studies students) who are able to demonstrate the generic skills required for a vocation in tourism (Dale and Robinson, 2001).

The intention of this article is to focus on the advantages of the use of case studies for learning. The author believes that the case method can make a valuable contribution to the development of effective tourism education and training.

What is a case method?

A case study is a description of a management situation or perhaps a “management story”; the analysis of a case in business education and training may be thought of as the business equivalent of the medical “second opinion” (Shapiro, 1984).

The case approach in teaching business first appeared at Harvard Business School in the early 1920s as a result of a desire to professionalize management education through the use of case examples, as had been the practice in medicine for many years (Wolfe, 1998). At first businessmen were invited to discuss their current business problems with students. Subsequently those problems and background material were put in written form. This is how Harvard started a new tradition in US management education, a tradition that is nowadays accepted throughout the world (Christensen and Hansen, 1987).

The constant day-by-day practice in case analysis serves to ingrain certain habits of thought, certain ways of breaking down problem situations, and the ability to reason analytically about each issue, constructively draw conclusions, and develop plans of action (Corey, 1980). In a properly conducted class using business the case method, students are put in the position of executives who must arrive at definite conclusions to be followed by specific actions whose merits will be tested by the resulting developments. Although in fact students only express an opinion without such responsibility, serious students get the essential background for responsible decisions without the risks to themselves and to their industry that stem from amateurish action (Gragg, 1940).

An effective case study is one that inspires students to think and decide creatively. Case studies can be brief and can explore one particular issue, or they can be longer giving an overview of the whole organization and its business activities. Cases in varying lengths are used in almost all course work in business education, but have an especially high usage in marketing, human resources management and strategic management. Among the challenges in using cases, there are the difficulties of ensuring that the situations and elements accurately reflect reality.
The case method encourages active learning and, in doing so, fulfils the purpose of the kind of education that is reckoned to be vital for the expected turbulent twenty-first century (O’Cinneide, 1997).

Objectives and problems in teaching cases

The case method is built around the concepts of metaphors and simulation – each case is a description of a real business situation and serves as a metaphor for a particular set of problems (Shapiro, 1984). The use of the case study method is based on the belief that the student can best attain managerial understanding and competence through the study, contemplation and discussion of actual situations. The most fundamental contribution that the case method has made to teaching has been its rationale that “active” or “participating” learning is more effective than its traditional “passive” counterpart – the lecture approach (O’Cinneide, 1997).

On the assumption that “there is nothing so practical as good theory”, cases are an important medium for introducing students to the theory which underpins good practice in each of the management skills areas (marketing, human resources management, accounting, finance, operations management, strategy), providing the opportunity to make better sense of reality and, at the same time, to test the validity and usefulness of the theory (Richardson, 1994).

Amaratunga and Baldry (2000) claim that the aim of case studies cannot be to infer global findings from a sample to a population, but rather to understand and articulate patterns and linkages of theoretical importance. Vignali (2001) thinks that case studies can also help in areas where the current ideas in literature are deficient, helping students become more conscious of how these ideas were formed and how they might be changed.

Based on the findings of Jennings (1996), the most important learning objectives associated with the method are:

- to acquire knowledge
- to confront the complexities of specific situations
- to develop analysis and synthesis
- to relate theory to practice and assist the long-term retention of that understanding
- to transfer knowledge and techniques from classroom to the manager’s own organization
- to develop interpersonal skills, communication and listening
- to gain illustration of particular points, issues or managerial principles
- to provide managers with a neutral situation in which they are free to explore problems
- to develop self-analysis, attitudes, confidence, responsibility
- to develop judgment and wisdom
- to enliven teaching
- to gain the student’s intellectual and emotional involvement
- to bring realism into instructional settings.

The case method is demanding for both teachers and students. Gragg (1940) stresses that a badly handled case system cannot but be an academic horror – improperly handled, a case is merely an elaborate means for confusing students. The teacher or the instructor plays a multiple role. Andrews (1954) describes him as follows: he is student, listener,
analyst, questioner, paraphraser, and minuteman lecturer; he plays these parts without costume changes, and he never steals the show from the rest of the cast. Student reaction to cases and interactive teaching in the classroom are generally positive, but vary according to the type of program and discipline (e.g. Jennings, 1996; Wright, 1996; O’Cinneide, 1997). Shapiro (1984) emphasizes that students who participate actively in the case analysis and discussion, and who attempt to generalize their learning across cases, gain the most from the process. Jennings (1996) suggests that a number of problems, such as relevance, the demands on students’ time and the issue of providing sufficient scope for analysis, could be aided through improved case research writing and editing, thereby tailoring case material to fit the particular demands or teaching situations. Wolfe (1998) reports that the case method itself is becoming more and more rigorous in terms of what constitutes a viable teaching case and with regard to how cases should be presented and discussed. He speaks about the processes of “professionalizing” and “standardizing” case teaching and writing, done through special professional meetings, symposia, workshops and case review processes.

Among the challenges of using cases is the difficulty of ensuring that their contents and elements accurately reflect the complexity of current case reality. In applying the case method, there is a need to identify the objectives of case users and the method for measuring the effectiveness in meeting those objectives. All this means more and better quality cases, and consequently better learning experiences.

The use of the case method in tourism education

It is argued that case studies are a powerful methodology whose use might be expanded to embrace a variety of disciplines (e.g. Richardson 1994; Wright, 1996).

The study of tourism is relatively new, as is its widespread recognition as a vital and growing industry (Amoah and Baum, 1997). The literature supports the view (e.g. Evans 1993; Baum 1994) that the very nature of the tourism industry, with immense diversity in terms of product, services and interests, makes it difficult to establish a clear picture of educational needs.

Much has been written about tourism educational programs – their content, curriculum, quality, (e.g. in Bosselman et al. 1996; Airey and Johnson 1999). Authors usually explore the development of tourism education, rank current programs and try to compare and to assess the standing of institutions involved in tourism education. Their research reveals that tourism degrees are in fact very different in nature and content, so that uniformity in titles or descriptions can seldom be found. However, they agree that education and training must be aimed at helping tourism professionals to best serve the needs imposed by the current business environment.

Therefore, it is expected from education specialists to innovate programs and courses, their content and delivery. In response to changes, future courses, educational material and techniques should be novel and complex, followed by the corresponding design of a practical methodology for monitoring and evaluating the outcomes of education or training programs.

The use of the case method in tourism education rests upon the assumption that an effective way of preparing for a career in tourism can be compared with the effective way of preparing for a business career, which is to learn to analyze data and to make decisions. The direct involvement of the student in the learning process through active participation in classroom activities, and special focus on the decision-making process (as opposed to the
acquisition of theory alone), are two aspects of the case method that seem to have a lasting impact on business education. This, of course, does not mean that theories are not important – they are of extreme importance, but managers must develop the ability to use theories in a daily processing of situations in the real world. Therefore, cases are particularly good for disciplines in which particular problem-solving is required.

Dale and Robins (2001) have developed the three-domain model of tourism education (shown in Figure 1), which contains the body of knowledge essential for modern tourism professionals. Each of the domains is organized and formulated in order to enable students to acquire the knowledge and skills essential for effective business in the tourism environment. The authors claim that the model has a number of benefits, including the facilitation of the development of tourism as an academic field of study.

*Figure 1 – The three domains model of tourism education*

Consequently, most of the courses important for modern tourism careers can be taught in part or even entirely by the case method, depending on the purpose of education. Knowledge-oriented courses, taught mainly at universities, cannot be taught solely by the case method because it is not the ideal method to transmit abstract knowledge. Action-oriented courses aimed at acquiring and improving skills (education of practitioners) can be taught entirely by the case method. The use of the case method approach must be appropriate for the context and the objectives of the courses. In addition to selecting cases with the appropriate themes of the courses, they may need adaptation so that they are appropriate for the level of education. Cases should consist of complex and often inconsistent real-life situations that people employed in tourism face currently and routinely in their practice. Furthermore, a case study should be empirical evidence from the field of study, which, through describing situations and problems, offers a learning experience and enables the testing or construction of theory.

When used in the safe environment of a classroom, cases will promote experiential learning through the simulation of (Nelson, 1996):

- the analysis of practical problems or decision situations
- the judgment of the character of actors in a situation
- the proposal of a theoretical solution for a problem situation
- the anticipation of factors affecting the implementation of a proposed solution
- the application of a theoretical solution to a problem situation
- the examination of an issue from a different point of view.

The use of case studies can be extended to assessment as well, so that both learning and assessment are integrated. O’Cinneide (1997) claims that a written examination, if correctly formulated to seek critical analysis and if structured to welcome student opinions/perspectives on issues/ideas, can provide a unique forum for students to express and actualize themselves.

**Conclusion**

Case studies have long been used in business education and professional training. The main purpose of using cases and other experiential teaching is the application of knowledge and theory in designing an action plan that will effectively address the concerns of the case.

By examining the nature and purpose of the case method, the author strongly believes that in tourism education the case method can work effectively to achieve the training objectives. It can be useful in multiple ways: case studies should help generate a group of examples of different situations and can be a valuable vehicle for active learning. Furthermore, case studies may bridge the gap between the theory taught in courses and the realities of tourism business activities and practice. They can be used for a variety of topics and issues of importance for tourism professionals. Also, the case study technique is able to promote group interaction during sessions. Although the case method has advantages, and can greatly enrich educational and training outcomes, it can be used neither in every situation nor as the only teaching method.
This article only marks the starting point for a wider analysis and consideration of the use of case methods in tourism education. Further rigorous research of the role and effectiveness of case study teaching as well as of other teaching and learning methods in achieving the educational objectives in tourism education is also necessary. If the case method proves to be an effective and well-accepted experiential learning tool, it might become a leading teaching technique in many areas of tourism education.

References:

Corey, E.R., (1980), Case Method Teaching, HBS Note 9-581-058, (Boston, Ma.)
Gragg, C.I., (1940), “Because Wisdom Can’t Be Told”, HBS Note 451-005, (Boston, Ma.)

Shapiro, B.P., (1984), *An Introduction to Cases*, HBS Note 9-584-097, (Boston, Ma.)


Tourism sandwich placements revisited

Graham Busby, University of Plymouth

Abstract

Tourism Bachelor’s degrees were first launched, in Britain, in 1986; fifteen years on, the Universities and Colleges Admissions Service’s web-site displays eighty higher education institutions offering degrees featuring ‘tourism’ in their title for entry in Autumn 2001; many of these degrees include a sandwich placement period and this paper builds on an earlier publication by reviewing the concept of the sandwich placement, some of the literature on ‘transferable skills’, and assesses the results of a simple, longitudinal survey of UK-based placement students conducted annually since 1997. One of the trends to manifest itself since the previous published research (Busby et al 1997) is the marked increase in the salary range between the lowest and highest-paid. The three transferable skills that stand out as being acquired, as a result of the placement, are team-working, communication, and inter-personal skills; this applies across a wide range of tourism sectors.

Evidence from visiting students in situ during their placement, since 1995, confirms to this author the view that the placement provides the opportunity for students to confront theory with practice; in other words, the under-graduate programme appears to achieve a balance between theoretical and vocational content. The sandwich placement is the nexus between academic and vocational content. It enhances a range of skills and also provides a valuable insight into the world of work generally.

Key words: sandwich placements, tourism degrees

1 University of Plymouth, Seale-Hayne Campus, Newton Abbot, Devon, TQ12 6NQ, England
Telephone: 01626-325646 Fax: 01626-325657 Email: gbusby@plymouth.ac.uk
Introduction

Tourism Bachelor's degrees were first launched, in Britain, in 1986 at Bournemouth and Newcastle. Fifteen years on, the Universities and Colleges Admissions Service's (UCAS) web-site displays eighty higher education institutions (HEIs) offering degrees featuring 'tourism' in their title for entry in Autumn 2001 (www.ucas.ac.uk 2001). Airey & Johnson (1998:10) observe that “by any yardstick the growth… during the 1990s has been remarkable”. However, it is quite difficult to identify precisely how many awards exist because modularisation permits a wide range of degree titles: a search of the UCAS web-site, for year 2001 entry, revealed 878 degree programmes which incorporate the terms ‘tourism’ or ‘travel’ in their named award; Table 1 illustrates the variety of tourism degree titles but is far from definitive.

Table 1. Examples of first degrees incorporating Tourism in the award title

| Sustainable Tourism Development (Anglia Polytechnic University) |
| Art & Design History and Tourism Studies (Bolton Institute) |
| Cultural Tourism (Buckinghamshire Chilterns University College) |
| Tourism and Leisure Studies with Music (Canterbury Christ Church University College) |
| Adventure Tourism (University of Central Lancashire) |
| Tourism Management and Women’s Studies (Cheltenham & Gloucester College of HE) |
| Tourism Management with Garden Design (Cheltenham & Gloucester College of HE) |
| Healing Arts and Tourism (University of Derby) |
| Forensic Science and Tourism (Univ. of Lincolnshire & Humberside; South Bank Univ.) |
| Cell Biology and Tourism (Oxford Brookes University) |
| Tourism Management (University of Plymouth) |
| Theatre Studies and Tourism (Trinity College Carmarthen) |

Fayos-Solá (1995:16-17) argues that “rigid tourism systems only reflect the inertia of the past… (and) accordingly, the curricular design and content of teaching programmes should respond increasingly” to the demands of tourism employers. Whether the plethora of new degree titles, of the last three years, can be considered to be a response to employers or a concern by HEIs to put ‘bottoms on seats’ is a moot point. Of the 878 degrees, for year 2001 entry, 275 include Tourism Management in the title; it is students on these programmes who should be able to “demonstrate vocationally relevant managerial skills and knowledge by exposure to professional practice” according to the Quality Assurance Agency’s Benchmark Statement (QAA 2000:7). How will HEIs inculcate this? The sandwich placement is the obvious vehicle: some of the verbatim comments made by students during the experience and cited below indicate this. Evans (2001: 28) concurs, stating that for students at Northumbria – one of the original tourism degree providers – “the placement experience provides a practical foundation for the fourth… year of study, which attempts to find solutions to real business problems”.

A final point to be made concerning this growth is that it does not only emanate from the ‘new’ (post-1992) universities: four ‘old’ universities offered under-graduate pro-
grammes for 1999 entry (Busby 2001) whilst, for 2001 entry, this has risen to eight (UCAS web-site 26 March 2001). An adjunct to this is that some ‘old’ university degrees review tourism as a phenomenon but make no mention in the award title because of the minor part it plays in the curriculum overall; for example, the Geography degree at the University of Exeter - the study of tourism merely enriches the discipline (Cooper et al 1994) – and there is not “a strong enough vocational element to make the graduates ‘industry-ready’” (Page et al 2001:164).

Any consideration of tourism degrees must address the inclusion or otherwise of ‘work experience’; Richards (1995:7) refers to placements providing “a vocational focus”, echoed by Cooper & Shepherd’s (1997:35) statement that “in higher level education… training in practical skills is seen as essential by the industry and this is reflected in the integration of an industrial year or professional stage into the majority of degree level course structures”. Citing reports by Her Majesty’s Inspectorate (1992) and the Council for National Academic Awards (1993), Airey & Johnson (1999:230) comment that inclusion, or otherwise, of sandwich placements “may provide a guide to the business orientation of individual courses” whilst noting that Busby et al (1997) “indicate that this may not be the case”. Sandwich placements may vary in duration from twelve weeks to twelve months and would appear to be an optional component of social science-based awards as well as business management-type tourism degrees in the UK. A review of UK tourism degrees, with entry in 2001, showed that 23 per cent provided one-year placements (Busby & Fiedel 2001).

Having outlined the background to the development of tourism degrees, the objectives of this paper are:

1. to review the concept of the sandwich placement with emphasis on one named tourism management degree in Britain;
2. to review some of the literature on ‘transferable skills’; and
3. to assess the results of a simple, longitudinal survey of UK-based placement students

The concept of the sandwich placement

This paper builds on an earlier publication (Busby et al 1997) by reviewing sandwich placements (internships) on one particular under-graduate tourism course in Britain; students on the University of Plymouth’s BSc Tourism Management have the option of spending 48 weeks on one or more placements. The aims of the placement, stated in the Student Guidelines, are:

- to experience employment and, where appropriate, accept responsibility for the completion of tasks and the supervision of others
- to develop key graduate attributes and skills
- to acquire further practical skills and experience
- to obtain an insight into management and management methods
- to gain greater maturity and self-confidence
- to be involved in the diagnosis and analysis of problems
- to develop attitudes and standards appropriate to career objectives
All of these aims imply that the placement forms part of the process of producing graduates with good business techniques – there is what Tribe (2001:444) terms “implicit adherence to business values”. This is further illustrated by Leslie & Richardson (2000) in their review of the benefits for the three stakeholders involved; see Table 2.

Table 2. Indicative advantages of student work experience

<table>
<thead>
<tr>
<th>The students</th>
</tr>
</thead>
<tbody>
<tr>
<td>• broaden their knowledge of the various sectors</td>
</tr>
<tr>
<td>• encourages a greater awareness of the diversity of the industry</td>
</tr>
<tr>
<td>• valuable opportunity to view the organisation objectively</td>
</tr>
<tr>
<td>• valuable as a reference source</td>
</tr>
<tr>
<td>• the more knowledgeable prospective applicants are about the company the better positioned for appointment</td>
</tr>
<tr>
<td>• influence career choice; potential to reduce period of graduate training programme</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>• availability of high calibre and generally committed staff at an early stage in their development</td>
</tr>
<tr>
<td>• opportunity to bring into the organisation someone who is not steeped in tradition nor one who probably needs re-training</td>
</tr>
<tr>
<td>• basically no ‘turnover’ problems</td>
</tr>
<tr>
<td>• potential contribution of student</td>
</tr>
<tr>
<td>• potential opportunity to undertake research by the student and supported by institution and tutors</td>
</tr>
<tr>
<td>• potentially employing one of tomorrow’s managers at a low cost</td>
</tr>
<tr>
<td>• possibility of the student on graduation applying for a position in a sector of the industry to which they are unsuited is reduced</td>
</tr>
<tr>
<td>• potential employee on graduation more knowledgeable about the company</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The institute</th>
</tr>
</thead>
<tbody>
<tr>
<td>• the contacts developed arising as a result of the placement system could lead to a number of indirect benefits</td>
</tr>
<tr>
<td>• facilitate inputs by the industry into course development</td>
</tr>
<tr>
<td>• increased liaison between the college and industry should lead to better course provision, and more informed tutors, as well as more knowledgeable, competent, and ‘industry aware’ students</td>
</tr>
</tbody>
</table>

Source: Leslie & Richardson (2000)

Data now exists for University of Plymouth Tourism Management sandwich placement employment over a period of seven years (1995-2001 inclusive) and this permits analysis of trends by sector, salary and skills acquired. Since 1998, the placement has been an optional component of the degree; however, under-graduates have been advised of its value in terms
of rapid employment after graduation. Empirical studies of graduates from a number of UK institutions confirm that placements are “a key factor in finding suitable employment” (Purcell et al 1999:5); see also Kiely & Ruhnke (1998) with regard to business studies degrees. Indeed, the extensive survey by Harvey et al (1997: 2), of employers and graduates, found that: “if there was to be a single recommendation to come from the research, it would be to encourage all undergraduate programmes to offer students an option of a year-long work placement”.

For the Tourism Management degree under review, the effect of making the sandwich placement optional is noticeable with many in the first cohort to be provided with the choice (1999/2000) electing not to undertake one; however, the numbers appear to be recovering (see Table 3). At this point, it is worth elaborating that the sandwich placement was made optional in order to fall into line with other HEIs. A disappointing feature in 1999/2000 and 2000/1 was the lack of interest in moderately well-paid posts in Florida and Canada; this has been rectified for 2001/2 with two placements in Toronto, one in rural Ontario, and seven in the eastern USA, including one with the BTA, New York. The point to be made here is that there has been no difficulty in “obtaining a varied range of placements to meet the total required” (Leslie & Richardson 2000:492) although it has been time-consuming from the staff input perspective. It is also worth noting, at this point, that students “often have unrealistic expectations on the nature of job opportunities” (Cave 1997:2).

Table 3. Numbers on placement from BSc (Honours) Tourism Management

<table>
<thead>
<tr>
<th>Year</th>
<th>1995/6</th>
<th>1996/7</th>
<th>1997/8</th>
<th>1998/9</th>
<th>1999/00</th>
<th>2000/1</th>
<th>2001/2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>25</td>
<td>33</td>
<td>35</td>
<td>34</td>
<td>19</td>
<td>22</td>
<td>27</td>
</tr>
<tr>
<td>UK</td>
<td>22</td>
<td>26</td>
<td>29</td>
<td>24</td>
<td>15</td>
<td>21</td>
<td>16</td>
</tr>
<tr>
<td>Overseas</td>
<td>3</td>
<td>7</td>
<td>6</td>
<td>10</td>
<td>4</td>
<td>1</td>
<td>11</td>
</tr>
</tbody>
</table>

Notes:

1 In the occasional case of a multiple placement, the location of the longest employment has been counted; for example, four months in a UK location and eight months in Florida.

2 The second-year cohort size, which provides the placement students, has not changed significantly over the seven years.

The sandwich placement does not count towards the honours degree classification. A separate Certificate of Industrial Experience is issued showing a moderated grade for the employment period and another for the 5,000 word project; the latter is usually related to some aspect of the job and, in many cases, is of value to the employer. In the light of Leslie & Richardson’s (2000:495) findings related to this aspect, namely that students considered that “assessment should be based on performance and not ‘academic’ assignments”, the Plymouth model appears to be a reasonable compromise. The “process knowledge” (Tribe 1997:647) acquired during the placement experience is considered to be a critical component of the tourism management skills base and this leads on to a consideration of those skills which can be identified as ‘transferable’.
Transferable skills

Many of the skills acquired during the sandwich placement are ‘transferable’; these have been identified by Hitchcock (1987), Greenan et al (1997), and the Dearing Report (1997) and are presented in Table 4. Gibbs et al (1994) identify twelve transferable skills although all but “entrepreneurship” are subsumed within the seven listed below.

Table 4. Transferable skills

- team-working
- communication
- inter-personal
- problem-solving ability
- organisational
- information technology
- numeracy
- learning how to learn

These skills are perceived by employers as being essential to graduate success (NBEET, 1992; Bridges, 2000) and it is through the vehicle of the sandwich placement that some are acquired or enhanced. Purcell & Quinn (n.d.:11) go further stating that the placement “is crucial in terms of the development of practical skills and teamwork”, based on their primary research. From a different perspective, in their survey of sandwich placements across nine undergraduate tourism courses, Leslie & Richardson (2000) discovered that there was limited skills development in information technology, presentation and writing whereas customer relations and oral communication were well developed; as they point out, this almost certainly reflects the high proportion of students working in an operations environment. In any event, information technology itself is unlikely to produce competitive advantage; it is how graduates “identify or develop creative uses” for it that matters (Daniele & Mistilis 1999:145).

It is worth noting that a feature of many tourism courses appears to be the acquisition by students of transferable skills from the taught modules – let alone via a sandwich placement – and, to this end, “they appear to be successful in preparing students more generally for employment” (Airey 1999:13). A key point to be considered here is that transferable skills can be allocated to a point on a continuum: from those skills that are very general in nature, through those “somewhat specific to the discipline” (Gibbs et al 1994:5) ending in those totally discipline-specific. For example, Spanish oral communication on a Hispanic Studies degree will form part of the discipline as much as being a skill.

It is this author’s contention that the sandwich placement has worked to both confirm students’ intentions to enter the tourism industry and to persuade others to enter alternative employment sectors (a point also made by Purcell & Quinn, n.d., Waryszak 1997 and Charles 1997). Whether the student enters the tourism industry or not, the experience will have been valuable and a number of transferable skills will have been acquired, some possibly subliminally.
Methodology and results

The longitudinal survey

Data has been gathered in two ways; firstly, from the placement information sheets completed by students at the beginning of their twelve months out – and confirmed during

the year by visiting staff – and, secondly, by use of a basic, confidential, postal survey undertaken approximately five months into the job for those placed in the UK. The single

sheet comprising two open questions, addressing skills acquisition, has only been mailed to those on placement in the UK although, with hindsight, those overseas should have been

included. It was originally considered that overseas placements would be gaining further – and different - skills/attributes by experiencing other work cultures and languages; it is now

accepted that this would have provided additional data and should have been collected.

Given that a sizeable proportion of placement students are working above ‘standard’ weekly hours, it was considered that two open questions, with reply-paid postage, would

generate a reasonable response rate although making it confidential would mean that staff

would not know who had replied. With regard to validity of the data, the aspect of confi-
dentiality was also considered to eliminate “subject bias” (Robson 1993:67), i.e. respon-
dents would not make comments they believed would please the placement officer, this

author, and yet there would still be “open dialogue” (Tribe 2001:443). This longitudinal

survey has operated since the 1997/8 academic year and does not purport to be sophisti-
cated in any way. Whilst the findings are representative of the Plymouth placement cohort,

this may not be the case for those from other university programmes.

Results

Based on the placement information forms submitted by all students at the start of their

employment, one of the trends to manifest itself since the previous published research

(Busby et al 1997) is the marked increase in the salary range between the lowest and high-
est-paid (bonus payments have never been included in the mean figures although £300 per

month is not unusual). It would appear that a relatively small number of under-graduates

are prepared to accept posts that pay significantly below the norm if the employer is well-

regarded and the placement is sensibly structured with emphasis on variety and responsibil-

ity; an example would be the National Trust who have recruited two students, in recent

years, to the post of Assistant Visitor Services Officer at Dunster Castle in Somerset. The

scope for responsibility and the possibility of making a real contribution has been recog-
nised by students even though the remuneration is £100 per month plus accommodation. At

the other end of the spectrum, employment in travel technology can be financially reward-

ing. For example, a placement in Galileo GDS customer support attracted a basic of

£14,400 per annum in 1998/9.

The postal survey has attracted the following response rates from under-graduates: 63% for


36%; for the first time, the forms were mailed out by the placement administrator and not

the author although it is difficult to believe that this affected the response. Not surprisingly,

perhaps, one of the key findings of the postal survey has been the extent to which under-

graduates believe their level of confidence has increased. A greater level of familiarity with

technology is also reported although this can be widely interpreted; for example, it can

indicate GDS expertise or survey software practice. At this point, it should be stated that
comments made by the placement students are considered to be both “reliable” and possess “construct validity” (Robson 1993:68).

Table 5a presents the results for seven of the skills identified in Table 4; ‘learning to learn’ has not been mentioned specifically by any respondent and cannot be readily interpreted from any of their comments despite its “essential” status (Harris et al 1997:277). Table 5b refers to an attribute arising from the placement experience, namely increased confidence, cited by some students; “enhanced confidence”, as a result of the year-long placement, has also been reported in the literature, see Kiely & Ruhnke (1998:492).

Table 5a. Skills acquisition as notified from survey of UK-based placements

<table>
<thead>
<tr>
<th></th>
<th>1997/8</th>
<th>1998/9</th>
<th>1999/00</th>
<th>2000/1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of respondents</td>
<td>17</td>
<td>14</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>team-working</td>
<td>6</td>
<td>6</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>communication</td>
<td>8</td>
<td>8</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>inter-personal</td>
<td>13</td>
<td>11</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>problem-solving ability</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>organisational</td>
<td>9</td>
<td>7</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>information technology</td>
<td>9</td>
<td>7</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>numeracy</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 5b. Number of respondents citing

| increased confidence | 7 | 4 | 4 | 1 |

The decline in response rate for 1999/2000, compared to the previous two years, was disappointing; added to the fact that fewer individuals were undertaking a UK-based placement, results in comments from just seven students.

At this juncture, some of the verbatim survey comments made by students during the placement are worth reviewing. It has been difficult to select just one respondent, for each year, from the wealth of detailed material. The style shown is that adopted by the individual. For example, if bullet points or continuous prose were used, this is replicated – along with any spelling mistakes. Two of the respondents refer to Seale-Hayne: this is the University of Plymouth campus where they are based. The first question asked students what they had learned as a result of the placement whilst the second asked what skills and attributes they considered they possessed as a result of the experience.
Qn.1: Mostly industry-based around organisations and structures:
• that a tourism post may not always be structured rigidly and that certain areas need
  the employee to work on their own initiative
• make the most of colleagues with relevant skills as this will save both time and
  money
• learn as much as you can about everything (especially in managerial positions) to
  understand the functions of different departments
• be flexible and have self-confidence in your own ability, as this tends to be
  “picked up on” by colleagues
• the extent to which politics and economics impacts on tourism strategies and plan-
  ning

Qn.2:
• a greater understanding of the industry and the company
• over-come my technological phobia especially new programmes by entering into
  training courses including Powerpoint/Excel/Quattro Pro
• understanding of “how to implement” theories learnt; into practical day to day usage
• training certificate in market segmentation and knowledge of a “new” database to be
  launched next year
• the difference between being a tourism student and a member of the tourism indus-
  try, i.e. the reality behind the theory*
• increased realisation of the importance which a placement plays on future job pros-
  pects... and career in general

  * by the way, attended a segmentation seminar and saw many similarities between “our
  marketing course” and this one!! Made sure I mentioned this to the seminar organiser who
  was impressed!! Great for Seale-Hayne image.

Qn. 1:
• brilliant insight into the industry itself
• gained large amount of product knowledge through in-house supplier presentations
  (hotels, DMCs, etc), visits to properties and World Travel Market
• have learned about all elements and details that go into preparing and running pro-
  grammes
• made lots of contacts in the industry (very useful!)
• good insight into ‘company politics’ (not always pleasant)
• job is not necessarily what I thought it would be

Qn.2:
• improved team working skills
• improved computer skills
• telephone and secretarial skills
• how to work under pressure (long hours!) and to tight deadlines – especially on site
• creativity
• accuracy and attention to detail
Qn.1:
Having been immersed since the start of the placement six months ago in the airline industry – particularly the area of customer services, I have gained valuable insight into the operation of the airline as a whole. [author adds: much text before] … I have been able to experience many changes and a lot of restructuring of all departments. This has not only taught me that the need for change is a necessary requirement of any business to be successful into the future, but also to expect changes and to work with them. …

Qn. 2:
Overall my IT skills have been much improved so far. I am much more proficient with the use of Microsoft Excel – creating tables, graphs and combined reports, and also with the use of Microsoft Word.

Learned how to create web pages using Microsoft Frontpage – as one of my projects, I have had to design and produce an intranet page for our department. I must also have a procedure so that future employees can update and maintain the site.

Improved communicational [sic] skills, and ability to use MS Powerpoint for presentations.

The ability to think on my feet – having to deal with situations as they arise (for example dealing with customers), and producing ad-hoc reports for managers when asked. Also I believe I approach tasks now with a more open mind than I would have done previously, having had to deal with numerous types of situations. I work better in team situations now, having had to work with the department to produce results (inputting information, and getting feedback).

Qn.1:
I have learned what it is like to work so hard that you have to work from 9am through the whole day with no breaks until 10pm with no reward – just to finish what you are working on. I have also learnt that there are some excellent perks to the job after going on a familiarisation [sic] trip to Malta on club class and staying at the 5 star Hilton.

Qn.2:
I have become much more confident and more willing to do difficult tasks. I now realise that things can be done and I am on the way to learning how to achieve them. I have also learnt about standards – how to achieve them and maintain them – unfortunately [sic] those standards often come at a price (!) Basically I have gained so many new skills and everyday I learn something new. I am not looking forward to going back to Seale Hayne.

Discussion

Sectoral representation

An early point to note is that, whilst sector representation (Table 6) remains reasonably constant, year-on-year, the numbers employed in some can fluctuate; for example, in 1997/8, there were five placements at the British Tourist Authority/English Tourist Board whereas airline placements are never more than one or two in each year. A potential criti-
Cism is that the results do not identify whether particular skills are predominant in one sector compared to another. This issue was considered before the first mail-out with the conclusion that requesting identification of sector might result in students not responding because it would enable the author to identify the individual; the benefit of confidentiality has been that some comments have been made that would not otherwise have occurred – there is no doubt that the students have felt that they can be very open with their remarks.

<table>
<thead>
<tr>
<th>Table 6. Sectors represented year on year 1995-2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995/6</td>
</tr>
<tr>
<td>local authority</td>
</tr>
<tr>
<td>scheduled airline</td>
</tr>
<tr>
<td>tour operation</td>
</tr>
<tr>
<td>cruise line</td>
</tr>
<tr>
<td>conference venue</td>
</tr>
<tr>
<td>hotels</td>
</tr>
<tr>
<td>time-share management</td>
</tr>
<tr>
<td>1996/7</td>
</tr>
<tr>
<td>UK national tourist boards</td>
</tr>
<tr>
<td>UK regional tourist board</td>
</tr>
<tr>
<td>tour operation</td>
</tr>
<tr>
<td>cruise line</td>
</tr>
<tr>
<td>ground handling</td>
</tr>
<tr>
<td>hotels</td>
</tr>
<tr>
<td>time-share management</td>
</tr>
<tr>
<td>tourism representation</td>
</tr>
<tr>
<td>tourism consultancy</td>
</tr>
<tr>
<td>direct marketing provider</td>
</tr>
<tr>
<td>1997/8</td>
</tr>
<tr>
<td>UK national tourist boards</td>
</tr>
<tr>
<td>UK regional tourist boards</td>
</tr>
<tr>
<td>local authority</td>
</tr>
<tr>
<td>tour operation</td>
</tr>
<tr>
<td>conference venue</td>
</tr>
<tr>
<td>visitor attraction</td>
</tr>
<tr>
<td>ground handling</td>
</tr>
<tr>
<td>time-share</td>
</tr>
<tr>
<td>conference &amp; incentive org’er</td>
</tr>
<tr>
<td>retail travel</td>
</tr>
<tr>
<td>1998/9</td>
</tr>
<tr>
<td>UK national tourist board</td>
</tr>
<tr>
<td>UK regional tourist board</td>
</tr>
<tr>
<td>airport operation</td>
</tr>
<tr>
<td>tour operation</td>
</tr>
<tr>
<td>visitor attraction</td>
</tr>
<tr>
<td>GDS</td>
</tr>
<tr>
<td>hotels</td>
</tr>
<tr>
<td>retail travel</td>
</tr>
<tr>
<td>conference venue</td>
</tr>
<tr>
<td>time-share</td>
</tr>
<tr>
<td>independent marketing</td>
</tr>
<tr>
<td>conference &amp; incentive organiser</td>
</tr>
<tr>
<td>1999/2000</td>
</tr>
<tr>
<td>UK regional tourist board</td>
</tr>
<tr>
<td>airlines</td>
</tr>
<tr>
<td>tour operation</td>
</tr>
<tr>
<td>visitor attraction</td>
</tr>
<tr>
<td>hotels</td>
</tr>
<tr>
<td>conference &amp; inc. organiser</td>
</tr>
<tr>
<td>airport operation</td>
</tr>
<tr>
<td>2000/1</td>
</tr>
<tr>
<td>local authorities</td>
</tr>
<tr>
<td>airline</td>
</tr>
<tr>
<td>tour operation</td>
</tr>
<tr>
<td>visitor attraction</td>
</tr>
<tr>
<td>hotels</td>
</tr>
<tr>
<td>conference &amp; incentive org’er</td>
</tr>
<tr>
<td>museum</td>
</tr>
</tbody>
</table>
A key point to note with Table 6 is that discrete sectors are shown; for example, with ground handling, GDS or conference & incentive organiser, these are independent businesses providing that service and not the respective departments of a tour operator, airline and hotel. Secondly, two or three students each year undertake hotel-based placements usually because of interest stimulated by option modules taken from the BSc Hospitality Management programme in their second year. Nonetheless, these are all sectors of the *tourism industry* according to Jafari (1997).

In his review of employer involvement in higher education, Cassells (1994) – from the University of Northumbria – identified three levels: arms length relationships, partnerships and strategic alliances. Despite having had placements with some organisations for many years, it is difficult to classify any as strategic alliances if only because the dynamic nature of the industry can mean that budgets preclude recruiting a student one year and not the next. With perhaps five or six organisations only it is possible to state that we have a partnership “where employers and educators really want to develop the relationship to the benefit of both” (Cassells 1994:3). However, the remainder are hardly kept at ‘arms length’, there is simply less regular contact and involvement. What should not be underestimated is the amount of time any level of liaison requires.

**Skills and attribute acquisition**

The first three skills in Table 5a can be compared to Athiyaman’s (2001:7) findings from 122 graduates of a Bachelor of Business degree over the years 1990-1993. His respondents considered that the university in question did not help them to acquire the skills needed in employment; the “statistically significant deficient skills include: oral communication, leadership, interpersonal, teamwork, supervision and negotiation”. Whilst the number of respondents is small, the percentage of Plymouth students citing acquisition of three of these skills has remained fairly constant as shown in Table 7. This is reassuring since O’Halloran (2001:102) has also drawn attention to the growing awareness that students feel “aggrieved at the limited level of preparation for work they are receiving during their H.E. experience”.

*Table 7. Percentage of respondents acquiring skills identified by Athiyaman (2001)*

<table>
<thead>
<tr>
<th></th>
<th>1997/8</th>
<th>1998/9</th>
<th>1999/00</th>
<th>2000/1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team-working</td>
<td>35</td>
<td>43</td>
<td>42</td>
<td>25</td>
</tr>
<tr>
<td>Communication</td>
<td>47</td>
<td>57</td>
<td>57</td>
<td>63</td>
</tr>
<tr>
<td>Inter-personal</td>
<td>76</td>
<td>78</td>
<td>42</td>
<td>38</td>
</tr>
</tbody>
</table>

Given that around half of all Plymouth’s respondents recognise the acquisition of these key skills during the sandwich placement, the obvious question is whether Athiyaman’s students undertook any form of work experience; he does not state one way or the other. Those Plymouth students not undertaking a sandwich placement might still be expected to possess two or three of these skills as a result of the assessment methods during the degree; for example, group presentations and reports - this is likely at other HEIs in Britain (see Bowen, 1996, for details of the programme at Oxford Brookes University). The placement, however, does reinforce the student’s awareness of the importance of these skills. Interest-
ingly, the Delphi survey by Yale & Cook (1995), of 57 tourism industry experts in the USA, reported the following skills as critical requirements for potential employees: listening skills, interpersonal skills, business-writing, and presentation skills; the internship (placement) period was considered to be an excellent opportunity for organisations to observe and select the best talent. In the case of University of Plymouth students, a few organisations have certainly used the placement to select staff for employment after graduation.

Although some placement students occupy very responsible positions, most will not be faced with significant problem-solving duties. On the other hand, it is conceivable that respondents are not necessarily aware that they ‘solve problems’ in their everyday duties – meaning that identifying the solution to specific difficulties is taken for granted. Anecdotal evidence suggests this is possible: it can range from dealing with an over-booking in tour operation to guest complaints for a front-of-house placement student.

Evidence from visiting students in situ during their placement, since 1995, confirms to this author the view, held by Elias (1992), that the placement provides the opportunity for students to confront theory with practice; in other words, the under-graduate programme appears to achieve a “balance between vocational and theoretical content”, as recommended by Airey (1996: 17) and Go (1994). It is possibly at this point when the student starts to reflect on the vocational-educational balance that they become aware of how they have ‘grown’ - although it is disappointing that few refer to increased self-confidence. Undoubtedly, most students do reflect upon their experience since they readily discuss principles and ideas, formulated as a result of the placement, at the de-briefing held at the beginning of the final year. Gibbs et al’s (1994) skills learning cycle captures the process entirely (see Figure 1). It is also suggested that much tacit knowledge (Symes & McIntyre 2000) is acquired.

*Figure 1. The experiential skills learning cycle*

![Diagram](https://via.placeholder.com/150)

Source: Gibbs et al (1994)
Firstly a point, related to remuneration, should be made: the recognition, by some students, that a lower-paid placement with a nationally-renowned employer (which looks good on a curriculum vitae or résumé) suggests a certain level of instrumentalism (Silver & Brennan, 1988) on the part of a few. To those individuals, the year out is clearly vocationally-oriented rather than simply fiduciary. It can now be reported that an outcome for the second student to undertake the National Trust placement referred to above, in 1998/9, was the acquisition of the nationally-advertised post of Direct Marketing Officer, with the Trust, after graduation. The sandwich placement undoubtedly provided the procedural knowledge which Tribe (1997:639) identifies as a hallmark of “the professional practice of tourism management”.

In their typology of first degrees, Silver & Brennan (1988) proposed a range from A to H whereby Type A represents the sole regulation to employment and completed training (medicine, for example) and Type H degrees provide non-relevant training with graduates competing in an open job market. In as much as the sandwich placement is viewed as a vehicle for obtaining employment after graduation by many, if not all, it is suggested that the University of Plymouth BSc Tourism Management conforms to either Type G or F. Type G degrees apply to open market job conditions where there is an employment-relevant educational base whereas Type F awards relate to partial regulation by the industry, including the public sector, and with an educational base for training.

Silver & Brennan (1988:47) state that, with Type F degrees, “the professional field and academic area share a common subject matter that will ensure a basic relevance to students with vocational motivations”. An example of this type are Tourism Officer posts with local authorities for which “employers are increasingly advertising for tourism graduates” (Busby 2001: 34) – is this, itself, an early indication of professionalisation? After all, a “professional institute” – the Tourism Management Institute – was established in 1997 (www.tmi.org.uk). If an increasing number of local authority tourism officers possess a tourism degree, Wells (1996:27) will have been proved correct in stating that HEIs “appear to be ably positioned to shape the attitudes of future professionals”; this almost certainly is a truism for other sectors as well.

Whilst most undergraduates in the second year of the BSc Tourism Management do not have a clear idea of career intentions, those who show an interest in the public sector are encouraged to apply for placements with local authorities and QUANGOs (quasi-autonomous national government organisation), such as the British Tourist Authority, as such experience can provide the necessary competitive advantage after graduation. Two students on placement, in consecutive years, with the BTA were recruited after graduation and the same applies to two individuals with the South East England Tourist Board. As an adjunct, at this point, it is worth noting that sectoral careers information – and the skills required by each – is very patchy. Hing & Lomo (1997) have observed that employment destination can be a matter of chance as much as choice.

Reviewing the content of most placements, over the last seven years, leads this author to suggest that they undoubtedly help inculcate those vocationally relevant skills and knowledge referred to in the QAA benchmark. Furthermore, “learning by doing reinforces classroom understanding by contextualising knowledge” (Clark & Whitelegg 1998:326). To that end, the sandwich placement is the nexus between academic and vocational content.
Conclusions

Several years ago, Bowen (1996:120) commented that for many British HEIs, “the lack of a work placement programme might be seen as a critical weakness”; it certainly reduces the scope for students to acquire a broad range of skills. However, the introduction of tuition fees and increasing size of student loans is posited as one of the reasons for fewer students undertaking a placement despite clear evidence that those who have included this element in their degree studies obtain employment quickly after graduation. Another reason, as Busby (2001:39) notes, is that “whilst salaries are not particularly low, they do not sufficiently entice the student”. Nonetheless, “for many employers and graduates, work experience makes a real difference” (Dearing Report, 1997:136). Whilst the number of graduates being produced nationally has increased dramatically, there has been a reduction in the number of well-qualified school leavers and this has increased “employer take-up of graduate relative to non-graduate staff” (Mason 2001:9). With an increase in the supply of graduates, a twelve month placement can help differentiate between applicants from an employer’s perspective.

It is also argued that reflection on the experience once the individual returns for the final year can help to stimulate a critical evaluation of the tourism business as advocated by Tribe (2001). This is particularly relevant to the level 3 Sustainable Tourism module: the placement has provided an insight into industry practice that would simply not be present in the second year of the degree. The opportunity for debate is further enhanced by some students having been employed by FTO (Federation of Tour Operators) members and others with AITO (Association of Independent Tour Operators) and, therefore, the potential corporate diversity of view vis à vis sustainability (Curtin & Busby 1999). Accepting what Tribe (2001) refers to as a positivist approach to curriculum design, every effort should be made to encourage students to undertake the sandwich year. Not only does it enhance a range of skills, it also provides a valuable insight into the world of work generally.

References


Cooper, C., Shepherd, R. & Westlake, J. (1994) *Tourism and Hospitality Education*, (Guildford: University of Surrey)


A system dynamics approach to experiential learning in tourism

Mirjana Pejić Bach, M.Sc.¹

Abstract:

Decision-making in tourism is often very risky because the consequences of managers’ actions are visible only after a longer time (months or even years). An ideal education tool in tourism would allow managers to compress time and space in a non-risk environment and gain experience and make mistakes without fear of real damage. Such a tool would allow potential managers to see the consequences of his/her actions in a few minutes or hours, and to detect possible wrong assumptions about real world tourism markets.

This paper argues that system dynamics models could meet the educational challenge in tourism and allow managers to avoid intuitively correct decisions that are actually not optimal. The paper will review the application of system dynamics models in tourism, and will present the usage of system dynamics models as an educational tool in tourism.

Keywords: learning, game, tourism, system dynamics

¹ Ekonomski fakultet – Zagreb, Trg J.F.Kennedya 6, 10000 Zagreb, Tel: +385 1 2383 282, e-mail: mpejic@efzg.hr
1. Introduction

Decision-making in the tourism industry is very complicated because the costs of managers’ decisions are visible only after a longer time. For example, if the quality of service decreases, the number of tourists will not decrease immediately, because it takes time for the ex-tourists to spread this information by word of mouth. In addition, the tourism industry is influenced to a great extent by many factors. These factors include personal disposable income in the domestic country, the cost of travel and living in the tourist country and substitute tourist country, the exchange rate, political disturbances, sales promotion, word of mouth, friendly people, etc.

The tourism industry would benefit from more effective education that would improve the quality of decision-making. The purpose of this article is to describe and demonstrate the applicability of system dynamics models as decision and learning support tools for the management of organizations in the tourism industry that permit controlled experimentation and enhance understanding of reality.

2. Using system dynamic models as management learning tools

System dynamics is a powerful tool that enhances learning about the company, market and competitors, portrays the cognitive limitations of the information gathering and processing power of the human mind, facilitates the practice of considering opinions, and supports the building of "What if" scenarios.

Over the past twenty years, the growth of computer technology has facilitated a wide application of system dynamics modelling as sophisticated tools for simulating business environments and situations. The basic goal of management simulation games is to apply experiential learning to the commercial world. They are designed to allow the player to experiment with the model on a compressed time basis while reducing costs and personal risk. The participant is able to see the consequences of his/her actions in a few minutes or hours. In the real world such consequences are visible only after a much longer time (months or years).

In order to achieve educational objectives, simulation should start with adequate briefing, which introduces the rules of the game and helps the players to vividly imagine themselves in the described situation. The learning objective of the game should be clearly defined. For example, one of the learning objectives of Fish Bank Ltd. is to show how competitive behaviour can destroy renewable resources (Meadows, 1989). Simulation games are equipped with different technologies that could include game boards, decision sheets or computer-based system dynamics models. The duration of play could be hours, or could be a few minutes and a different number of players could be involved. An important part of the game is debriefing, which helps players to construct their experience into knowledge that can be re-applied.

It seems that simulation games are very useful in helping players to learn. Still, there are different views that express doubt that knowledge acquired can be applied in a real work situation (Neuhauser, 1976). The real payoff from simulation games can be achieved if attention is paid to a number of possible difficulties and problems: (1) no clarity regarding learning objectives, (2) materials support an event without learning, (3) neglect of other teaching methods, (4) inappropriate emphasis on technology, (5) too many elements mixed,
(6) inadequate briefing, (7) inadequate debriefing, (8) offering operators too little training, and (9) under-estimating the time and money needed to create materials.

3. System dynamics models in tourism

The consequences of managers’ actions are visible only after a longer time (months or even years), which is the reason why decision-making in tourism is often very risky. The system dynamics approach is useful in uncovering the unexpected consequences of decisions such as launching a new product (Maler, 1998), and advertising mobile communications (Bui et al., 1996). Management games developed for the hotel and restaurant industry and the airwaves industry with the use of a system dynamics methodology will be presented. There are also numerous applications with high potential for application in tourism, and they will also be presented with a suggestion for specific use in tourism.

3.1. Management games in the hotel and restaurant industry

Applications of system dynamics methodology in the hotel and restaurant industry range from using system dynamics models in search of learning organisations within the hotel industry (Morrison et al., 1994), energy management in the hotel industry (Konis, 1994), and planning tourist complexes (Sedehi et al., 1983).

The management simulation game “Beefeater Restaurants Microworld” is developed for education in restaurant management (Larsen et al., 1997). Beefeater Restaurants Microworld is based on a true story about Whitbread PLC, a large UK brewing firm, which over 15 years developed a restaurant chain operating 280 UK restaurants.

The game is played in a specially designed environment – “cockpit” – where the user can explore the structure of the system, make decisions and see the consequences of his or her decisions (Figure 1). The player focuses on the needs of consumers and investors, and makes decisions on meal prices, labour expenditure, marketing expenditures, maintenance expenditure, menu development, and capital expenditure requests to head office. The success of the player is measured in terms of the earnings, sales revenue and volume, return on sales and capital employed, and shareholder value.

An additional option is available to operate against a major competitor who attempts to capture good sites. It is possible to explore what would happen if the competitor were present at the beginning or in the middle of the simulation. Also, the effectiveness of the competitor in achieving growth can also be set, so the player can “fight” a strong or weak competitor.

Experiences gained while playing Beefeater Restaurants Microworld can be applied to diverse problems such as the growth of Starbucks coffee shops in the US and the UK, the growth of hotel chains, and many emerging fashion chains.
It is useful to stress the principal learning mechanisms captured during the game (Strategy dynamics, 2001):

- business performance over time (sales and earnings) depends on the resources we have
- resources are won and lost over time (customers = sum of all customers ever won, minus all ever lost)
- resources bring with them a characteristic contribution to the rest of the system (increasing restaurant numbers bring a diminishing incremental market opportunity)
- growth depends on existing resources, including intangible factors (customers are won if service, menu, and environment are acceptable vs. the price charged)
- business growth depends on winning investor support (e.g. headquarters allocation of capital expenditures)
- maximising value in a mature market – difficult because market exploitation inevitably imposes limits on further opportunities to grow
- shareholder value reflects earnings growth, not merely earnings levels (and hence is hard to sustain)
3.2. Management games in airways industry

People Express Airlines was established in 1981. In only five years the company had grown to be the fifth largest airline in the United States (Sterman, 2001). Yet by September 1986, People Express was nearly bankrupt, and was acquired at the last minute by Texas Air. The People Express Management Flight Simulator gives the players the opportunity to find out the reasons for the failure. In each simulated time period, the player has to make strategic and operational decisions on:

- pricing
- marketing efforts
- hiring policy
- financing in a time of crisis
- financing in order to grow

At the end of the game, players gain insights into the difficulties of coordinating operations and strategy in a growth market and in understanding the dynamic interactions among a firm, its market and its competitors.

Dangerfield (1989) uses a system dynamics model in order to analyse the causes of the failure of the airline company “Laker Airways”, and demonstrates that an inadequate financial policy was the main reason for failure. The company experienced rapid growth from 1977 to 1981 during a buoyant economy. The purchase of new airplanes was financed with long-term credit. However, because of the recession, cash flow decreased as the number of passengers fell. Still, the firm had long-term credit to repay. The management considered that the recession would not last too long. Therefore, short-term credit with higher interest rates were used to finance long-term credit. In time, the debts of the company increased, and the banks forced the firm into bankruptcy.

The Customer Growth and Rivalry mini-simulator is based on an example of the European start-up airline easy-Jet that was established in November 1995 (Morecroft, 1995). In two years the company became a strong competitor (Sull, 1999). The player has two tasks to accomplish: (1) to create customer awareness, and (2) to deal with retaliation.

The game starts with 5,000 customers that are already aware of the airline. However, the start-up airline needs to attract 1 million passengers. The number of passengers is increased by marketing (newspapers, media), attractive prices, and word of mouth. On the other hand, the number of customers can be decreased by a reputation for poor service.

The number of potential passengers is also influenced by the competitors’ price, which depends on the competitors’ costs and their margin. Competitors’ costs cannot be reduced easily or quickly. In order to change costs, competitors need a process of restructuring which could be conducted over a shorter or longer period.

The game is played in a controlled environment (Figure 3). The player makes a decision on marketing expenditure. The ability of the competitors to change costs over a shorter or longer period is represented by the Time to Change Costs.
3.3. Other management games with high potential for application in tourism

There are numerous management games with high potential for application in tourism, and some of them will be described below.

The Beer Distribution Game, originally called the “Production-Distribution Game”, is played on a board that portrays the production and distribution of beer. Each team consists of four sectors: Retailer, Wholesaler, Distributor and Factory arranged in a linear distribution chain. The goal of the game is to meet customer demand and order enough from your supplier to keep your inventory low while avoiding costly backlogs (Sterman, 1992).

CreditSim is a powerful tool to study dynamics and explore possible options using all financial statements to improve results. It allows the player to overview how the business can develop in time. Through an analysis of scenarios, managers can assess upcoming decisions like price increases, the purchase of fixed assets, a decrease in raw material or increase in labour costs, and a new invoicing or credit management strategy (Melse, 1997).

Professional Services Microworld will be described in detail (Strategy Dynamics, 2001). The game is designed to experience the challenges of a professional service organisation named the Partner Team with the aim of growing the business in size and reputation over 30 years, creating wealth for the firm's partners. In order to achieve this objective, the player will try to manage the growth of professional staff (consultants, assignment managers and partners) to match the growth of the client-base.
The game is also played in a “cockpit” environment (Figure 3). Users have three main items to decide upon in developing staff:

- how many new consultants to recruit,
- how many consultants to promote to manager, and
- how many managers to promote to partner.

Figure 3. Professional Resources Microworld (Strategy Dynamics, 2001b)

Because of over-work, boredom, lack of promotion prospects (consultants and managers) and poor expected bonuses (partners and managers) staff losses are a continuing problem. The goal is to keep staff-development in balance. If there is too much attrition or over-rapid promotion, levels of experience will fall, and client satisfaction will decrease together with revenue.

The game offers insights that are valuable beyond the world of consulting, law and advertising. Wherever an organisation depends on the strength of key staff groups who develop expertise and seniority over time, which is the case in the tourism industry, the challenges of balancing recruitment with business growth, providing opportunities for advancement, and ensuring an adequate supply of staff at each level will always arise (Strategy Dynamics, 2001).
4. Experiments with the game

Two experiments with Customer Growth and the Rivalry mini-simulator will be presented. In Scenario 1 it is presumed that competitors are slow in adjusting costs, and Time to Change Costs is set to 4 years. Also, the player sets marketing expenditures at £2.5 million per year. The goal of the game is to fill 12 planes to ensure commercially viable load factors, which could be accomplished with approximately 1 million passengers. The simulation starts with 5,000 potential passengers at the start of 1996.

A large number of passengers is attracted both by bold marketing and by word of mouth. By the end of 1996 there are approximately 400,000 potential passengers (Figure 4).

*Figure 4. Scenario 1 – Number of passengers at the end of 1996 (London Business School, 2001)*

Word of mouth increases the number of potential passengers (Figure 5). Therefore, the number of potential passengers grows rapidly between 1997 and 1998. In the middle of 1997 the required number of passengers is met, and by the end of 1997 there are more than 1 million extra potential passengers.
After 1998, growth ceases because the airline reaches all the passengers in the region that it serves (Figure 6). Scenario 1 indicates the strong impact of word of mouth that is usually forgotten.

In Scenario 2 it is again presumed that competitors are slow in adjusting costs (Time to Change Costs = 4 years). However, marketing expenses are five times smaller compared to Scenario 1 (£0.5 million per year).
Again the simulation starts in 1996 with only 5,000 potential passengers. Because of rather low marketing expenses by the end of 1996 the company wins approximately 100,000 potential passengers (Figure 7).

*Figure 7. Scenario 2 – Number of passengers at the end of 1996 (London Business School, 2001)*

Despite low marketing costs the number of passengers grew during 1997 to an impressive number of 800,000 (Figure 8). Word of mouth was strong enough to bring in passengers.

*Figure 8. Scenario 2 – Number of passengers at the end of 1997 (London Business School, 2001)*
During 1998 word of mouth attracted even more passengers (Figure 9). Before mid-1998 the number of potential passengers exceeded the number of required passengers. Growth continues until all the passengers in the region are attracted, which happens by the end of 2000. In Scenario 2 the message has spread to all the customers in the area, and the firm saves money on marketing.

Figure 9. Scenario 2 – Number of passengers at the end of 2000
(London Business School, 2001)

5. Conclusions

Effective decision-making contributes to the better business performance of firms in the tourism industry. It is important that tourist managers understand that although demand depends on a number of exogenous factors, there are also variables that the firm can control like price, the quality of service and advertising.

Traditional methods of teaching tend to equip students with knowledge that could eventually help them solve their future business problems. On the other hand, simulations are designed to initiate active, student-oriented learning. Students seek information that is useful in achieving the goal of the game, and during that process their understanding of the system increases.

Simulation games hold out the promise of new and advantageous ways of learning, and could be useful in the education of managers in the tourism industry. The simulation games proposed in this paper could be useful in developing decision-making skills. They could also increase understanding of the influence of managers on a firm’s profitability and success.
6. References


242
Virtual tourist marketplace
an approach to experiential learning

Višnja Špiljak, University of Zagreb
Darko Prebežac, University of Zagreb

Abstract

This paper deals with an interdisciplinary approach to teaching business communication for university students specialising in tourism. Since we teach future business communicators, the course must have three "anchors": English + Business (Tourism) + Communication.

"The English anchor" will focus on functions (e.g. enquiring, informing, presenting, persuading, etc.); on register (e.g. polite forms, levels of acceptable formality or informality), on cross-cultural differences in these fields (the way different cultures "colour" business English in international business transactions); on structure (grammar etc.). "The Business (Tourism) anchor" will focus on the specific practice and terminology of the activities carried out in this area, and to some extent on the scientific research done in tourism. The Communication anchor will focus on business communication skills: in the first stages of the project on written skills (business correspondence, brochure and reports writing etc.), and in the later stages on oral skills as well (presentations, meetings, negotiations, socializing). The students have to be given "linguistic weapons" to contextualise and interpret information. A very important ingredient, one of the staples here, is to create cross-cultural awareness.

The authors will propose an international project: "Virtual Tourist Marketplace" in which business students from different countries will be "offering", "selling" and "buying" goods and services, as a part of a tourist offer. The project demonstrates huge potentials of networking of students from around the globe using the internet as a new locus for value creation. It clearly demonstrates the importance of learning groups as useful experiential learning tools in business education.

Keywords: Learning, business language in tourism, business communications, experiential learning, virtual learning groups, virtual marketplace, internet.

1 Darko Prebežac, Ph.D., Associate Professor in Tourism Marketing and Market Research in Tourism, Department for Tourism, University of Zagreb, Graduate School of Economics & Business, e-mail: prebezac@efzg.hr
Introduction

It is not an easy task to analyse and systematically study the development of tourism and its impact on a national economy. (...) Tourism is not a classical, separate economic branch. It is a heterogeneous activity composed of a series of different industries which, besides their basic activity, also participate in tourism. (Cicvarić, 1990). This definition of tourism necessarily leads to a more encompassing definition of tourism education.

The work of a graduate school of business consequently must be aimed at preparing students for administrative positions of importance. Therefore, business education must be directed to developing qualities in students like: understanding, judgement and communication leading to action. To achieve that students must be accepted as an important part of academic picture.

It is time we changed the paradigm of learning to a paradigm of communication. The dominant paradigm today is a learning paradigm based on information transfer. This implies that learning is an acquisition of information or knowledge. Education has been based on this paradigm for centuries: universities, schools, training activities... "Education becomes an act of depositing, in which students are the depositories ... Instead of communicating, the teacher issues communiques and makes deposits which the students patiently receive, memorize and repeat. This is the banking concept of education... it is the people themselves who are filed away through the lack of creativity... For apart from inquiry...individuals cannot be fully human". (Bork, 2000). Ways in which we learn today, in the best of cases, include attending lectures, reading, analysing case studies, being involved in simulations, observing models and being involved in role playing (Perry and Euler, 1985). Let us look honestly into our hearts and see what our "teaching practice" is like most of the time. We teach, we transfer information.

Now we need a communication paradigm through which students will be "learning by doing", researching and communicating. Experiential learning is about experiencing and doing (Hicks, 1996).

A paradigm shift is always difficult since all of the stakeholders seem to be caught in a paradigm paralysis (Bork, 2000). Confucius himself tried to "revolutionize" the educational paradigms long ago:

If I am told, I forget
If I am shown, I remember
If I do, I understand…

The use of Internet media has radically changed teaching/learning/communication relationships. The lecturer will have to become an information facilitator, a critical analyst of knowledge, a study guide, a reviser and assessor of a student’s academic education. At the same time students will have to start to be aware of their essentially active role in the communication/learning process as members of a virtual community of people with shared educational interests (Boticario and Gaudioso, 2000). Ives and Jarvenpaa (1996) claim that nothing will protect business schools from being swept along with the current technologically driven change and suggest that they must develop alternative visions based around the virtual learning environment.
Traditional versus virtual learning

The main differences between the traditional and the virtual learning process are briefly summarised in Figure 1.

Figure 1: Traditional versus virtual learning

One of the main differences between the traditional classroom model and the virtual learning model is that virtual learning brings specific and real problems into the learning environment. In the traditional classroom, case studies are used as examples. The gap between the educational institutions and the "real world" can shrink in the virtual classroom. Virtual learning can encourage experiential learning by using real, timely and specific examples. These examples can also be used for subsequent learning groups as discussion points.

An effective virtual learning environment consists of a group of trainees working together via Internet. Such kind of groups are relatively open and allow students to actively interact with other participants, as well as affording access to a wide range of resources. These environments foster "any time/any place learning" thus enabling participants to log on anywhere in the world and at any time. In addition, the virtual learning environment not only provides a method of delivering knowledge, but also is a powerful mechanism for creating knowledge (Wilson, 1996).

A tutor is no longer a lecturer but a facilitator of knowledge who supports the collaboration and problem-solving process (Nunn, 1998). Students can construct, discover their own knowledge through such creative learning. In a programme developed in 1985 at the Uni-
versity of California, high school students discovered the laws of genetics, following procedures similar to those used by scientists. (Bork, 2000).

An integrated model for virtual learning can be showed as in Figure 2.

*Figure 2: An integrated model for virtual learning*

![Image of an integrated model for virtual learning](source)


One of the most valuable elements of a virtual classroom is that of collaboration and dialogue (Symons, 1996). According to McFadzean (2001b) a process for developing collaborative learning teams in the virtual classroom must include the steps which can be summarised as follows: attention to the task, attention to the process, attention to team development, attention to team dynamics and attention to team trust. At the same time we have to respect that virtual learning can be developed and supported by considering some critical factors. These critical factors are: the pedagogical perspective, the intellectual perspective, the technical perspective, the collaborative perspective and the facilitative perspective.

It has been proved that in order to acquire new skills and knowledge, participants should be actively involved in the learning (Bonwell and Eison, 1991; Kolb 1984). In order to develop an effective virtual environment however, a tutor must support the group participants, maintain a safe environment and encourage novel problem solving processes (McFadzean and McKenzie, 2001).
Virtual international tourist marketplace

We are proposing an international project of establishing a virtual tourist marketplace. The participants will be students of tourism from around the world who will set up virtual tourist agencies, tour-operators, hotels, other hospitality industry facilities, transport operators and various other complementary services. The students will research the market, segment the market, develop a range of products, define the right pricing policy, create a communication policy and find the appropriate distribution channels. They will use "in practice" what we have taught them and what they have found out themselves, and will be exposed to good and bad sides of their knowledge and skills, or the lack of them, and to the logic of the "market".

The project has been modelled on the project of "Virtual international marketplace" carried out two years ago within our Graduate School of Economics and Business in Zagreb, at the Department for foreign business languages. In 1999 teachers of business English from business schools and faculties of economics from around the world, from Ecuador to Indonesia, gathered in Cambridge on a British Council seminar on "English teaching in the era of globalisation". It focused on retraining general English teachers to become business English teachers. The seminar gathered high quality teachers and gave them a meeting place: apart from workshops and discussions, they learned about the syllabi of business English university courses in different countries. These syllabi reflected not only the standard of teaching and the level of learning, but showed how much they are economically and culturally conditioned. The outcome was that a group of participants-teachers decided to network their respective students into a virtual international marketplace. Thus, for two years, as a trial project, the students from Slovenia, Croatia, Austria, Germany, Hungary, Britain, Estonia and India were "doing business" in a simulated business environment, on the web. They were setting up their virtual companies, deciding on their activities, designing logo, offering their products and services to other "partners", writing business correspondence, «buying» and «selling».

In the Graduate School of Economics & Business in Zagreb it was carried out for two consecutive years (1999-2001). Its title was "Cross-cultural issues in teaching business correspondence". Here are two examples:

The first group of Croatian students offered a 10 days package of "silence and beauty at the Adriatic Sea, exploring the fascinating world of the Kornati Islands, experiencing a simple, natural life". They concluded the agreements with a Vienna "printing house" which prepared all the printed materials, with airline companies which gave special rates for organized groups etc. (Appendix 1).

The second group from Croatia were building an underwater colony in the South Adriatic, "selling a new way of life and were in need of people who would populate the colony". They were also looking for non-polluting industries that could help. The group joined forces with a herbal company from India producing health food and traditional herbal medicine, etc. (Appendix 2)

The response to the project was more than enthusiastic from both teachers and students involved and the network has been spreading since. Teachers and students from other countries joined. In the evaluation phases of the project we concluded that students learned business correspondence much more effectively through communicating with their partners on the web. They also acquired a cultural dimension which they would not have acquired otherwise. Our survey showed that 90 percent of the students in the sample said that they worked much more on the project than they would have if they had used the textbook.
The project won the national award in Germany as the best educational project in 2000. The results of this project have given us the idea to establish a virtual international tourist marketplace where our students will be "doing business" in the field of tourism. We believe this can be used as a multi-disciplinary and multi-cultural educational tool.

**The aims of the project**

The aims of the project of "Virtual international marketplace" can be summarised as follows:

- Research has shown, and we know it from our classes, that pre-experience students learn much more effectively through simulations of a realistic setting.
- To be able to complete some of the tasks the students will have to do research in their business environment.
- The insights gained from the project will give teachers the opportunity to identify possible grey areas where our students require further information, research and training.
- Such cooperation between students themselves, and students and teachers, enhance students' motivation, they are challenging, they build students' self-confidence (the students are exposed to the opinions and decisions of their international colleagues).
- Students acquire cross-cultural knowledge and raise the awareness of their own culture. Research in this field has shown that more than 80 per cent of international business communication is done between non-native speakers (a Japanese doing business with an Australian, a Croat doing business with a French), and most of the difficulties arise from cross-cultural misunderstandings and not from the lack of technical knowledge.
- Such projects create a closer relation between students and teachers who organize and monitor the project, they "humanize" the teaching.
- Last, but not least, they are fun for both students and teachers.

One of the most valuable feature of the project is its multi-disciplinarity: To be able to participate in such an international "marketplace", the students will have to develop their knowledge and skills in several disciplines: tourism, marketing, management, finance, accounting, business communication, cross cultural behaviour patterns, business English, etc.

This project has an interdisciplinary approach to teaching business communication for university students specialising in tourism. Since we teach future business communicators, the three "anchors" are essential here: English + Business (Tourism) + Communication.

"The English and Communication anchor" will focus on functions (e.g. enquiring, informing, persuading), register (e.g. polite forms, acceptable levels of formality or informality) and cross-cultural differences in this field. Teachers will pre-teach, pre-inform the students, give them the background information on the purpose of each type of letter (enquiry, offers, orders, acknowledging orders, letters of complaint, letters of adjustment etc.), show them typical structures and terminology used in business correspondence, and draw their attention to the pitfalls. Tourism teachers will discuss the real-world problems in such transactions.
The students have to be given "linguistic weapons" to contextualize and interpret information (ideas, facts, figures, charts). The teachers and the students involved analyse the whole web transaction after it has been finalized, but teachers do not interfere during the actual writing phase. The students choose themselves what they will be offering and buying, with whom they will be cooperating. They are designing their projects themselves and do research in certain areas. Close cooperation of all the teachers included is needed from the very beginning: setting the objectives of the project, designing the project and evaluating its results.

"The Business (Tourism) anchor" will focus on specific terminology of the activities carried out in this area, and to some extent on the scientific research done in tourism. A very important ingredient here is the cross-cultural aspect. The students will be able to link theories and try them "in practice". Because of the strong cross-cultural component in the project, they will develop cultural sensitivity and will be more easily employable. They will raise awareness in some basic categories like: marketing and management in tourism, consumer behaviour, planning etc. They will be better "tailored" to meet the requirements of a fast changing tourist industry.

Teachers whose students participate in the project agree on "who is writing to whom", usually "mixing" the countries with which your country already has trade relations and those with which it does not. Teachers-coordinators "meet" on web conferences on an agreed day of the week, to communicate results of the work in progress and feelings of their groups, to give their suggestions and "shop" for new ideas.

Later stages of the project

Our idea is that the project becomes a continual educational aid which encompasses various disciplines and is carried out in modules. Some of the possibilities are listed here:

- Insights gained through the project and students' research can help teachers focus their syllabus, text-books and teaching on the most acute topics and the "hot" spots.
- Tourist organizations and associations can be (should be) interested in the work during the project activities and in its results.
- The exchange of students (and teachers) participating in the project can be organized, deepening their knowledge and cross-cultural awareness, as well as building possible future business links.
- The information on the project can be disseminated through various dissemination activities at local, regional, national and international levels (conferences, trade journals, workshops etc.). The network of participants can be expanded after the evaluation of the initial phase of the project and its results.
- The web-site of the project can be set up, which will be maintained and updated by the students themselves.

Conclusions

We believe that tourism, as an "atypical" economic activity requires an "atypical" approach to educating future tourist practitioners and experts. Since tourism itself is composed of a series of different activities, we find that the education for tourism should be carried out through a series of different approaches. Multidisciplinarity of tourism offers
real challenges for humanized learning. The combined business, communication and linguist perspective will better capture the multifaceted nature of tourism on the global market.

The problems of learning are worldwide. The visions are already there: communicative, experiential learning, intercultural awareness, integrated education, not parcelized. The new paradigms offer us a good chance of realizing the visions. The project we are presenting is a possible tool of such integrated communicative learning. It could also help link students, teachers, experts and practitioners in tourism from around the world. It can be a simple, affordable and exciting global education programme.

References:


Cicvarić, A. (1990), "Ekonomika turizma", Zagreb-poduzetce za grafičku djelatnost, Samobor, p. 27.


Too much noise around you?

Tired of everything on earth?

Dive with 4G&H into the silence and beauty of the Adriatic Sea!

Come and spend 10 marvelous days exploring fascinating underwater world of Kornati Islands or learn how to do it. Away from the everyday pressure you will be able to experience simple, natural way of life in bungalows. Taste Mediterranean cuisine, capture the breathtaking sunset and surrender yourself to the scent of wild herbs and cricket's melodic song.

Price: 7,000 ATS (510 EUR) for 10 days
including - return flight,
- ship to Kornati,
- dinner, bed and breakfast,
- all excursions for 10 days.
Possibility of organizing excursions to Split, Zadar, Kornata National Park.
For groups over 25 people 10 % discount.
Departures on 10th, 20th, 30th of June, July, August.
Appendix 2

Zagreb, 8 April 1999

Dear Sir or Madam

Finally our colony is fully functional and we can proudly present you our offer. Our colony uses state-of-the-art technology and is situated 200 metres under water. You will find full details in the enclosed brochure.

If you want to buy the space, prices are as follows:

<table>
<thead>
<tr>
<th></th>
<th>Price per square meter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Apartment</td>
<td>2000 $</td>
</tr>
<tr>
<td>Penthouse</td>
<td>3000 $</td>
</tr>
<tr>
<td>Presidential Suite</td>
<td>4000 $</td>
</tr>
<tr>
<td>High-Tech Villa</td>
<td>6000 $</td>
</tr>
</tbody>
</table>

If you want to come to our colony and spend some time there to see what life in Aquatica looks like:

<table>
<thead>
<tr>
<th></th>
<th>Price per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Apartment</td>
<td>200 $</td>
</tr>
<tr>
<td>Penthouse</td>
<td>300 $</td>
</tr>
<tr>
<td>Presidential Suite</td>
<td>400 $</td>
</tr>
<tr>
<td>High-Tech Villa</td>
<td>600 $</td>
</tr>
</tbody>
</table>

Come and enjoy yourself!
Looking forward to welcoming you in Aquatica.
Yours faithfully

--------------------

Marketing Director
Dario Jazbec
Staying up to date with information techniques and information technologies in tourism vocational education

The reform of school programmes for catering and tourism in Slovenia

Vesna Loborec, High School for Hospitality and Tourism in Ljubljana

Abstract

Tourism and information technology are two of the largest and most dynamic industries in the world today. As technology increasingly becomes the driving force of improved productivity and business opportunities for enterprises in the 21st century, tourism and hospitality education and training must encompass the development and aims of educating future employees, allowing them to be able to use a variety of information and communication technology and strategies. In Slovenia, a reform of school programmes and curricula is underway in which we include the tourism industry’s needs relative to information technology. The question is how to qualify teachers to use information and communication technologies and then how to keep teachers up to date with them. We have developed a “job training” project for teachers and organised some seminars on the Internet as a tool for communication and information. For the time being, the majority of teachers do have some basic education on information and communication technologies in tourism. This is why teachers have to know the programmes (software and communications for the tourism industry) most frequently used (or more elaborated) in practice. Students are then able to acquire the knowledge of information and communication technologies in school, through case studies, that they will need in practice.


**Introduction**

Information technology is bringing about many changes in both practice and in the academic world. Two important links here should be put in order. First, we must bring together practical experience and theoretical knowledge of the teachers of tourism and, second, academics should stay up to date with all novelties in information technology used in the tourism industry. This is the only basis for students to be able to go to work because they then have both theoretical and practical knowledge and know-how to use information technologies.

1. **The link between theory and practice**

   The link between theory and practice is very important. The question arises how teachers can get the range of practical experience they need for teaching. We have developed a plan where teachers undertake practical work in tourist organisations where they observe, co-operate and take on real-life tasks. It provides a kind of on-the-job training for teachers. Teachers usually have a lot of theoretical knowledge and are up to date with research. Yet they do not have practical experience as their first job is often teaching. In addition, where they do have some practical experience after having been teaching for ten or more years, they do not follow the development and changes in practice. They are not connected to the “real” world. The solution was the project that involves sending teachers of economics and tourism management for “work practice” with travel agencies and hotels.

   Three groups of people were involved in this project. There were tourist organisations and hotels, where the advantages of this project are readily understood. When teachers have practical experience they can teach and explain real situations to students and have many practical cases to use in enhancing theoretical skills. The students involved come to tourist organisations not only with theoretical knowledge but already have some practical skills. For the tourist organisations these are better students since they can already help and undertake some tasks. It has happened that during work practice students were not given precise tasks because of the lack of practical skills of the teacher involved. It can be embarrassing where students have better practical skills than the teacher as their mentor. Hence, teachers need ongoing vocational training. One advantage for the tourism organisation is that it gives teachers the opportunity to learn practical skills which will assist students when they start working in an organisation. Teachers can, apart from lecturing, use other teaching methods like case studies, role-playing and discussions. On the other hand, all employees, especially those in the hospitality industry, need training to improve the quality of their work. Many schools organise programmes and seminars at all levels and fields of tourism organisations. Schools must have teachers who are qualified in both theoretical and practical fields. Teachers whose students enjoy learning, for whom the new skills make learning fun and effective, can exploit practical experience. Students acquire more than just school theory which is particularly important in the hospitality industry. Excellence in customer service lies at the heart of the hospitality industry. Service extends far beyond paying attention to basic tasks within the guest-server interaction. Each service transaction combines a task element and a human element. This human element often benefits the most from training programmes. Teachers must have contact with the practice of the working environment.
2. Information technologies and educating in tourism

The second reason why teachers need practical experience is that information technology is today developing and changing very rapidly. Teachers try to stay up to date with novelties in information technology used in the tourism industry. This is difficult as tourism and information technology are the largest and fastest growing industries in the world today. In 2005 tourism is expected to provide 300 million jobs around the world. All employees must know how to use the latest information technology. It is very important that students acquire knowledge of information and communication technologies already at school. This is only possible if practitioners and educators of both tourism and information technologies co-operate and exchange knowledge. This approach enables the exchanging of ideas and the development of synergies and calls for collaboration in both theoretical and practical areas. It is a problem that older teachers received no particular technology skills during their studies. They must learn first the basics of information technology and then apply it to the tourism industry. Besides, tourism technology is very intensive. It is impossible to learn information technology skills from books. It is necessary to participate and try at work to get all this knowledge and be independent. It is hard work because information technology is developing very fast and, by the time you have learned one programme, you have already received a new and better version. Teachers are forced to know how to use the technology in their tourism work.

3. Goals of the project

In Slovenia a reform of school programmes is underway and a curriculum has been drawn up to include the tourism industry’s needs relative to information technology. The question is how to qualify teachers to use information and communication technologies and how to keep teachers up to date with them. We made a plan to send teachers, with a lot of theoretical knowledge and who are experts in their subject, to undergo work practice to learn the novelties in management and technology. The goal was to give teachers an opportunity to improve their professional knowledge and practice, to gain practical experience for
preparing case studies and to help them stay up-to-date as much as possible with new information technology. This last factor is the most important because we live in a high-technology century. Accordingly, the education and training system must be able to produce high quality, information-supported professionals with up-to-date skills.

3.1. Information technology as an important component

In different sectors of the tourism industry information technologies are applied to operations and used for improving links with the industry. Information technology has an impact on travellers, firms and the entire industry. Today, travel agencies are all connected to the Internet. They need technology for internal communications between departments and they need it for external communications with other agencies, tour operators, hotels, restaurants, attractions, airlines, car rental companies, entertainment outlets and as a marketing tool. A tourism product is a unique type of product. The tourism industry, and hence the tourism product, is complex and consists of many component parts. To research and plan a trip, travellers must interact with many private sector firms and public sector agencies. Co-ordination and co-operation between these firms, agencies and the consumer are necessary to create the heterogeneous product called a trip. This requires efficient, accurate and timely information for the many aspects involved. Information and information technology provide crucial links between different industry sectors to provide for the real traveller’s planning and experience. If the links break down or are too slow, information is not transmitted in a timely manner and the industry does not function at all. The more complex and international the trip, the more information is required. (1)

The second characteristic of tourism, which makes the information involved so intensive, is its intangibility. Potential consumers are unable to see, touch or feel the vacation or business trip and its components before they purchase it. Instead, they want detailed information about the destination or product to substitute the lack of tangibility. This information can be presented via many different media forms. Travel product and destination information often come in the form of brochures, leaflets, and videotapes. However, electronic media is also increasingly being used. Global Distribution Systems (GDS) are currently the primary electronic media for travel agents. Travel agents provide CD-ROM discs to prospective consumers with multimedia presentations on destinations and travel products, giving a more vibrant indication of a trip. The Internet and the World Wide Web (WWW) are other voluminous sources of electronic travel product information. Virtual reality can even be used to provide a consumer with a more tangible experience of the product before making a purchase. The intangible nature of the tourism product has brought the information technology and tourism industries together to create a market for the product and make it more tangible. Information also helps reduce the risk associated with some travel types and is therefore valued by most consumers. Some travellers, however, prefer and feel challenged in a positive way by trips about which they know little before departing. (2)

The third factor which makes tourism product information intensive is its perishability. If an airline seat is not sold on a given flight, that particular seat can never be sold again. It, or rather the revenue from it, has perished. This is true for almost all products in the tourism industry and is due to the time-sensitive nature of tourism products. This characteristic has implications for the application of information technology. In addition, the use of high-speed data communication networks can assist firms in distributing last-minute information about available products so as to sell them before they “perish”. (3) By its very nature, the
tourism industry is one of the most international industries in the world. This characteristic further contributes to its information intensity. Geographical dispersion requires data communication networks around the globe to link countries, tourism firms and travellers together. Without information technology, the tourism industry would not function efficiently at the international level. In summary, the tourism industry is highly information intensive and information is its lifeblood. The application of information technology is therefore crucial to its growth and success.

Figure 2: Information technology communication in tourism (V. Loborec)

3.2. The Internet and the tourism industry

We are crossing over a technology threshold that will forever change the way we learn, work, socialise and shop. It will affect us all and businesses of every type in ways far more pervasive than most people realise. The Internet has three meanings in tourism. First, the Internet is a tool to get information, second we can communicate through e-mail and, for a company, the Internet is a marketing tool specially used for promoting destinations and products. All of this must be part of tourism education. If you cannot communicate and use information technology you are not literate and cannot survive in today’s business world. It is not enough to simply learn about it once, since you must constantly follow novelties, especially for students.
4. Realisation of the project

Eleven teachers of tourism economics spent two weeks in travel agencies and hotels to
learn about their operations and how to use information technologies. We observed, and the
employees explained to us, the processes, documents and computer programmes they use
for each operation. We visited all departments and made notes which were later used in
classrooms. In the agencies and hotels they were very generous and knew what and why we
desperately need this kind of training. Tourism and hospitality education and training must
aim to raise the ability of an employee to use a wide range of tools to increase their effi-
ciency and responsiveness. In particular, the effective use of information technology is
regarded as a key factor in the competitiveness and profitability of the tourism industry
sector. Teachers acquired practical experience and learned about information technology in
today’s tourism industry.

5. Conclusion

It is a fact that teachers in high schools for tourism must obtain some practical experi-
ence and that they must stay up-to-date with the use of information and communication
technologies in the tourism industry. It appears that most tourism and hospitality firms and
organisations require graduates to have mainly operational information technology skills.
There is a gap between what students learn in their undergraduate studies regarding infor-
mation technology and the opportunities to apply this in their work following graduation.
Yet if teachers also have this knowledge they can teach more than mere theory. All teachers
who participated in this project agree it is now easier to explain to students practical cases
of how to communicate and how to use information technology in the tourism industry.

References

PRESS: Florida
Tourism education and training programmes
regarding the specific needs of the SME sector in Slovenia

Sonja Sibila LEBE, University of Maribor

Abstract

In this paper, current programmes of tourism education and vocational training in Slovenia are described. The coverage of needs of the tourism industry is not yet optimal due to some unforeseen organisational and even demographic difficulties. Special regard is given to the needs of the SME sector and to the possibilities for life-long education (or/and) vocational training for employees in this segment of tourism enterprises.

Key words: Secondary tourism schools, ‘matura’, vocational training, university programme, matching of programmes to the needs of SMEs, matching of programmes to new needs of modern IT tourism industry
1. ANALYSES OF THE EDUCATIONAL SYSTEM IN SLOVENIA

The needs for skilled personnel have changed drastically during the last ten years, after Slovenian tourism managers realised that the golden era of mass tourism was over. The adjustment to the needs of the new tourism mentality and global market requirements started in Slovenia after its independence a decade ago.

The attempt was made to simultaneously improve the main economic factors, including an intense multi-annual programme for infrastructure improvement (investment into hotel renovation, into the swimming pools in hotels and spas, investments into ski-lifts) and a government policy of supporting programmes of incorporating all kinds of attractions into the tourist offer, establishing a new, modern promotional organisation, etc. A large programme of building roads was started – not primary for the needs of tourism, but the results in improved traffic flows have helped develop a positive image of Slovenian tourism.

After Slovenia became independent in 1991, the tourism managers realised that the level of skills of tourism employees was much below the average of other professions in Slovenia. A national plan has been made in order to improve the unenviable situation, including the foundation of some new educational institutions and a new Vocational Training Centre for Tourism. The plan was made following the recommendations of the WTO through the creation of a map of tourism professions (Cooper et al, 1997/47). Plans have been supported by the programmes Leonardo da Vinci and Socrates of the European Union, which assure adjustment to the level of education and training in line with EU standards.

1.1. Secondary schools for tourism and hospitality

Overview of secondary schools

Some new forms of education and vocational training have been introduced in the last decade, which broaden the variety of possibilities young people now have when they have to choose their future profession after completing primary school.

The primary school in Slovenia foresees a compulsory attendance of 9 years; this means young people have to decide on their professional future at the age of 15. In Slovenia, “general, professional and vocational education” (OG RS No. 12/96) comprises education in general and technical grammar schools (grammar school = general secondary educational school, equivalent to high school in USA, Gymnasium in Austria and Germany, lycée in France, etc.), vocational schools, technical and other professional secondary schools.

Vocational and professional education provides knowledge and skills required for performing an occupation. It enables the choice of occupation and preparation for it. Lower and middle vocational education is obtained by finishing studies with the ‘final exam’. Middle professional education is obtained by passing the ‘vocational matura’ (‘vocational matura’ = the final leaving examination; ‘matura’ = final external examination), which is a special form of final exam (MŠŠ, 1997).

Middle professional education can also be obtained by:

- completing continuing and differential programmes, and the so-called 3+2 model programmes, after finishing middle vocational programmes (concluded in 1998/99).
- Foreman/manager exams and master craftsman courses,
- Vocational courses of different professions (MŠŠ, 2001).
Differential programmes and 3+2 model programmes were replaced by two-year middle vocational technical education, i.e. 2-year programmes, which can be entered after obtaining middle vocational education.

‘Grammar schools’ are upper secondary schools that give general education and prepare students for university studies. We distinguish between general and technical grammar schools. By passing the ‘matura’, upper secondary education is obtained. After finishing a one-year ‘matura’ course, graduates of middle vocational, middle technical and other professional programmes can take the matura external examination” (SURS 2000, 121-138).

Secondary schools for tourism and hospitality

In Slovenia, which has approximately 2 million inhabitants, there are 10 secondary schools for tourism and hospitality, all offering the same choice of programmes, which are approved and licensed by the Ministry of Education, Science and Sports. Two main formation types on two different levels are offered to young people in these schools:

a) a three-year vocational programme, qualifying for the professions ‘cook’ or ‘waiter’, and

b) a four-year technical professional programme, giving the students the title “Tourism Technician” when completing the school.

The three-year vocational programmes

An equivalent vocational programme called ‘the dual system’ has been introduced recently. After having finished the primary school, pupils can decide to join an enterprise and get an appointed (by the Chamber of Crafts) foreman (manager) who is the young person’s supervisor during the three-year vocational training based on a system of training on the job. In this ‘dual system’ programme, working in the enterprise is combined with periods of learning theory at school. The final certificate (middle vocational education) is equivalent to the certificate of the finished vocational 3-year programme of any secondary school for tourism and hospitality.

Students who obtain the qualification ‘cook’ or ‘waiter’ have the possibility to continue their studies after passing two additional years of formation at school to achieve approximately the level they would have reached when choosing the four-year formation programme. After these additional two years, they can enrol, like the four-year-programme-students, on a 3-year business study of tourism and hospitality. A similar system is valid for other professions as well; the model is known in Slovenia as ‘The Three Plus Two Model Programme’.

---

2 The original text of the Statistical Office uses the wording “Tourism and Catering”, which is not appropriate as the programme greatly extends the dimension of pure catering.
3 In the following cities and towns: Ljubljana, Maribor, Celje, Novo Mesto, Slovenj Gradec, Radenci, Izola, Bled, Tolmin, Zagorje
4 Ministrstvo za šolstvo, znanost in šport
5 All translations into English refer to the terminology of SURS (the Statistical Office of the Republic of Slovenia), Statistical Annual 2000 (see references).
The four-year technical programme

Several four-year-programmes are being offered in profession-oriented secondary vocational schools (like the secondary school of economics, secondary school of machinery, secondary school of civil engineering, secondary school of art, etc.). Some of them offer the possibility (from the very beginning of the secondary school level) of passing at the end of the four-year programme the ‘matura’ examination, which makes the programme equivalent to that of a grammar school. This means that students have to pass all the courses foreseen for a grammar school plus some additional professional courses.

Until 2001, Slovenian secondary schools for tourism and hospitality provided such an offer. The students had the possibility to continue their formation by choosing any kind of study (university or vocational-oriented undergraduate studies) after having passed the matura examination. From the school year 2001/2002 on, only a final exam, which cannot be compared with the ‘matura external examination’ (neither in its extent nor in its complexity), is possible. It enables students to enrol in vocational study only (a three-year undergraduate programme).

Students who have completed a secondary school for tourism and hospitality, and wish to continue their studies in a university programme (4 years of study), have the possibility of accomplishing an extra year with an intensive preparatory programme for the ‘matura’, in order to match their general knowledge with the knowledge of students finishing the grammar school.

This means that a young person who insists on learning as much as possible about tourism from secondary-school level onwards, is thus losing a year (compared with the peers who have chosen the grammar school from the beginning).

1.2. Post-secondary vocational education (2-year programme with an obligatory practical training in the tourism industry)

There are two post-secondary short-type vocational schools in Slovenia offering a 2-year programme:

- The Vocational College of Catering and Tourism in Bled [www.vgs-bled.si](http://www.vgs-bled.si), and
- The Vocational College of Catering in Maribor.

In autumn 2002, a third 2-year vocational school will start the same programme in Ljubljana.

The main purpose of all these institutions is to provide additional knowledge and skills to the employees in the tourism and hospitality industries and to offer ambitious graduates from the secondary programmes the opportunity to deepen their knowledge.

Programme for catering

The programme for cooks is open only to applicants having a certificate from the 3-year vocational secondary school programme ‘cook’, or after the dual programme, which guarantees the practical skills of applicants. The education can be extended horizontally, offering specialisation for pastry cooking, sauce cooking, etc.

---

6 Matura (SI, HR, YU, BIIH, FYROM), Matura (A) Abitur (D), baccalauréat (F), final external examination (Jelenc, Z., 1991/12-54)
After completing this programme, there is only one possibility of continuing the studies, i.e. at a three-year vocational undergraduate study programme at the Turistica in Portorož, the only pure tourism undergraduate programme in Slovenia. Post-secondary graduates can enrol in the second year of studies.

Programme for waiters

The programme ‘waiter’ is open to a broader spectrum of applicants – but practically no one from grammar school seeks enrolment.

Additional skills can be acquired by specialising as a sommelier or a barman.

As is the case with the programme ‘cook’, after finishing this programme there is only one possibility of continuing the studies, i.e. at the Turistica in Portorož. Graduates can enrol into the second year of studies.

Students wanting to leave tourism have to start any other study from the beginning. The knowledge and skills offered in both these institutions of post-secondary short-type vocational programmes are so specific that they do not offer the possibility of linking to any other studies – except the already mentioned undergraduate vocational programme of the Turistica in Portorož (www.turistica.si).

Programme for tourism

This programme is offered in Bled only, and it has a very limited number of vacant study places. The demand for this kind of vocational profile is very low – there are hardly any travel agencies that would employ newcomers and at the moment practically no new agencies are being founded.

Students finishing this programme have the possibility of continuing their study at the undergraduate vocational level at the business school Turistica in Portorož only. Many graduates decide, because they cannot find employment, to begin a new study for a new profession, and thus leave tourism.

1.3. Undergraduate vocational education (3-year programme with an obligatory practical training in the tourism industry)

There are three business schools in Slovenia offering this kind of study for the needs of the tourism industry:

- University of Ljubljana, Faculty of Economics,
- University of Maribor, Faculty of Business and Economics, and
- Turistica, undergraduate vocational school for tourism in Portorož.

The programmes of both universities are based on the study of economics with the possibility of choosing some tourism-related courses as an option. The certificate the students obtain when finishing the undergraduate vocational level programme is a general degree in economics, which enables the graduates to find employment as economists in tourism or any other enterprise.

7 The old economic system did not care about the productivity of work: in all existing travel agencies in Slovenia, there were many more employees than needed. Several programmes for early retirement were launched to solve the problem, and some people could find new jobs in other sectors.
The third business school is Turistica (Portorož) and it is the only one that offers a really complex tourism programme and, therefore, the only one that makes it possible for students coming from post-secondary vocational institutions to continue their studies at a higher level.

There is no programme offering postgraduate specialisation in the field of tourism in Slovenia. Students can continue their studies in a two-year specialisation programme in economics without having to pass differential examinations.

**1.4. University and postgraduate study of tourism**

There is no university programme of tourism in Slovenia, and there is no programme for a postgraduate study of tourism either: neither at a master nor at doctoral level (ZIRRUM, 2000).

Students having accomplished a four-year university programme in economics can enrol into a postgraduate programme leading to a Master of Science degree in economics with the option of choosing two tourism-related courses during the studies and to discuss any tourism-related problematic in the master thesis. Graduates from other social science faculties can enrol into the master programme in economics after a preparatory year in which they have to pass the selected exams in economics.

The Master of Science degree is an obligatory base to obtain a Ph.D. degree in economics. The reference to tourism is given through the choice of the doctoral research work and the title of the doctoral thesis.

**1.5. Vocational training in Slovenia**

Several short seminars for vocational training are offered currently by diverse suppliers (e.g. Adult Education Centres and other special vocational or educational institutions). At the same time, all educational institutions from secondary school up to university offer vocational programmes with designed courses (shortened, seminar type of courses) for employed persons in the afternoon and in the evening, which enables employees in tourism to obtain a certified higher level of education. Additionally, short seminars related to some current topics are often offered.

*Vocational training centre for tourism*

In 1997, the “Vocational training centre for tourism” was founded in co-operation with the ILO and the EU (Leonardo da Vinci programme). In the first phase, national trainers were educated following a “train the trainer” programme. Parallel to this, modules of short seminars and workshops were created, offering topics like direct marketing in tourism, quality management, controlling, animation, communication, F&B management, front desk management, IT in tourism, the impact of the Euro on tourism, etc.

The first modules were offered to the participants as early as 1995, engaging trainers from abroad as lecturers (Austria was the main partner in the project). In 2000, the first group of national trainers obtained their certificates, which makes the courses more spontaneous and financially more attractive as simultaneous translation is no longer needed.

In this way, from 1995 till July 2000, more than 600 participants attended one or more of these modules in different durations, mostly between two and five days. Most of them are offered in the headquarters of the enterprises that decide to train their employees.
2. QUALIFICATIONS AND PROFICIENCY OF EMPLOYEES IN THE SLOVENIAN TOURISM INDUSTRY (Education and skills)

The current overview of the achieved education of employees in Slovenian hospitality and tourism sectors is much poorer than is the average in other service sectors in Slovenia (e.g. distributive trade as a good comparable service sector, or financial intermediation).

We present below two tables: the first one focuses entirely on hotels and restaurants, giving the possibility to compare the required level of education and skills with the current situation, which shows a good picture on how the present state of education is meeting the (claimed) needs of the Slovenian hospitality industry. Unfortunately, no data for spas, travel agencies and tour operators are available – but experience shows that the discrepancy between “is” and “should be” is not as enormous as in the hospitality sector.

Table 1: Qualification overview of employees in the Slovenian hospitality sector⁸ regarding the degree of qualification and of professional skills

<table>
<thead>
<tr>
<th>Current level of education and skills of employees</th>
<th>Required level of education⁹</th>
<th>Coverage of needs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>absolute</td>
<td>%</td>
</tr>
<tr>
<td>Hotels and restaurants together</td>
<td>15,834</td>
<td>-</td>
</tr>
<tr>
<td>Ph.D</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Master of Science</td>
<td>16</td>
<td>7</td>
</tr>
<tr>
<td>Undergraduate professional higher education</td>
<td>414</td>
<td>534</td>
</tr>
<tr>
<td>Postsecondary vocational education</td>
<td>525</td>
<td>785</td>
</tr>
<tr>
<td>Secondary professional skills (SPS)</td>
<td>3,364</td>
<td>3,151</td>
</tr>
<tr>
<td>Lower professional skills (LPS)</td>
<td>167</td>
<td>154</td>
</tr>
<tr>
<td>Highly skilled workers (HSW)</td>
<td>231</td>
<td>168</td>
</tr>
<tr>
<td>Skilled workers (SW)</td>
<td>6,555</td>
<td>7,262</td>
</tr>
<tr>
<td>Semi-skilled workers (SSW)</td>
<td>526</td>
<td>1,057</td>
</tr>
<tr>
<td>Unskilled workers (UW)</td>
<td>3,899</td>
<td>2,600</td>
</tr>
<tr>
<td>Unknown (UK)</td>
<td>77</td>
<td>116</td>
</tr>
</tbody>
</table>

*Source: Zaposlene osebe v podjetjih in drugih organizacijah po stopnji strokovne izobražbe in dejavnosti, Služba za izobraževanje GZS, 2000 (Employed persons in enterprises and other organisations according to the degree of professional qualification and activity, Chamber of Commerce, 2000).

⁸ In Slovenia, there are about 1,700 enterprises registered for work in the tourism and hospitality sectors, about 2/3 out of them in the hospitality sector (about 1,200).

⁹ For better understanding: employment following professional skills makes it possible that, for example, a person with a Ph.D works in a post for which only secondary school education has been required, or at the other extreme, a person with a lower secondary education occupies a post for which a master of science degree would be necessary.
Table 1 has two parts: in the left part, the level of current education and skills are shown. In the right part, the demanded education and skills are presented.

- The differences between “is” and “should be” in the upper part of the table show that more highly skilled people would be needed as they actually occupy the posts in the hospitality industry.
- In the lower part of the table, the situation changes dramatically: persons with less or even no qualification occupy posts which require highly skilled workers.

The second table presents a comparison between the current state in tourism and some other service sectors concerning the education and skills of employees.

The data in Table 2 are very interesting: almost 2/3 of all employees in hospitality are women. Most of them can be found in an appropriate extent to their percentage (2/3) of employment in the sector in the lower-skills jobs. The upper part of the table shows that mainly men are in the most skilled positions – this means in the management of the sector.

Comparisons with other sectors (like trade or financial services) that have a somewhat comparable structure of employees (intense customer-contact, sales-oriented) show a similar picture: the better skilled (and paid) positions are reserved for men, with women dominant in the less skilled sectors. There is an exception concerning trade, i.e. the lower-skilled workers are predominantly men – doing heavy physical work in storehouses, etc.
Table 2: Qualification overview of employees in some Slovenian service sectors regarding the degree of qualification and of professional skills

<table>
<thead>
<tr>
<th></th>
<th>Highly skilled jobs</th>
<th>Medium skilled jobs</th>
<th>Lower skilled jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Σ</td>
<td>Ph.D.</td>
<td>M.Sc.</td>
</tr>
<tr>
<td>Σ hospit.</td>
<td>15,834</td>
<td>-</td>
<td>7</td>
</tr>
<tr>
<td>Women</td>
<td>10,308</td>
<td>-</td>
<td>1</td>
</tr>
<tr>
<td>Σ trade</td>
<td>87,445</td>
<td>7</td>
<td>63</td>
</tr>
<tr>
<td>Women</td>
<td>46,335</td>
<td>-</td>
<td>16</td>
</tr>
<tr>
<td>Σ fin.int.</td>
<td>18,944</td>
<td>7</td>
<td>44</td>
</tr>
<tr>
<td>Women</td>
<td>13,405</td>
<td>2</td>
<td>15</td>
</tr>
<tr>
<td>Σ**</td>
<td>639,850</td>
<td>1,539</td>
<td>2,484</td>
</tr>
<tr>
<td>women</td>
<td>304,443</td>
<td>343</td>
<td>1017</td>
</tr>
</tbody>
</table>

*Please find the abbreviations for the second row of this table in the 1st column of Table 1. Σ** = all employed persons in industry and service sector in Slovenia. (Σ=Греческий латиница Σ)

Source: SURS, 2000; 221-244
In the Table 3 the skills are shown in percentages:

- Achieved education like Ph.D., M.Sc., university and undergraduate professional higher education, are grouped into “high skills”;
- Post-secondary vocational education, secondary professional skills, lower professional skills and highly skilled workers are grouped into “medium skills” and
- Skilled workers, semi-skilled workers and unskilled workers are grouped into “lower skills”;
- Unknown remains an extra category.

Table 3: Qualification-grouping overview of some Slovenian service sectors

<table>
<thead>
<tr>
<th></th>
<th>Σ</th>
<th>High skilled jobs</th>
<th>Medium skilled jobs</th>
<th>Lower skilled jobs</th>
<th>Unknown</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>In 000</td>
<td>%</td>
<td>In 000</td>
<td>%</td>
</tr>
<tr>
<td>Hospital</td>
<td>15,834</td>
<td>1,326</td>
<td>8.4</td>
<td>3,473</td>
<td>22.1</td>
</tr>
<tr>
<td>Trade</td>
<td>87,445</td>
<td>13,764</td>
<td>15.7</td>
<td>28,083</td>
<td>32.1</td>
</tr>
<tr>
<td>Finance</td>
<td>18,944</td>
<td>6,225</td>
<td>32.9</td>
<td>11,364</td>
<td>60.0</td>
</tr>
<tr>
<td>Σ</td>
<td>122,223</td>
<td>21,315</td>
<td>17.4</td>
<td>42,920</td>
<td>35.1</td>
</tr>
</tbody>
</table>

Source: SURS 2000; 221-244

Σ = grdelta letter Σ

Approximately 1/3 of all employees in the finance sector have a high level of education, trade follows with around 16%, and hospitality has only 8% of highly skilled employees.

In the column ‘medium skilled jobs’, finance has 60% of all employees; trade follows with approximately 1/3 of employees and tourism with 22%.

Only 6% of employees in the sector finance are low-skilled, and about 50% of all employees in trade. The lowest professional skills with almost 70% of employees belonging in the lowest category can be found in the hospitality industry.

3. ARE EDUCATIONAL AND VOCATIONAL PROGRAMMES IN SLOVENIA MEETING THE NEEDS OF THE TOURISM INDUSTRY, ESPECIALLY THE SME SECTOR?

The tourism offer can only be as good as the skills of people. We can hardly say this for Slovenia after having seen the table with the scheme of skills. The proof can be seen daily in the newspapers: in the short period of Slovenia’s independence, many renown and big tourist centres have been pushed into a crisis. In some of them, the crisis still remains – perhaps one of the reasons are members of the former management, who are still on duty in the old posts.

At the same time, some new stars are shining now on the tourism sky of Slovenia – mostly spas with an up-to-date management and with an offer adjusted to the wishes of modern tourists looking for relaxation, well-being, fitness, some cultural programmes and
activities to keep them mentally and physically fit. Another bright spot are the casinos with a very professional offer, investing much time and money into the skills of their employees.

Some educational and vocational programmes offered for the tourism and hospitality sectors are so new that a complex evaluation has not yet been completed (since only the first generation has graduated, it is too early to have a reliable reaction from the tourism industry).

Even with regard to programmes with more tradition, we cannot call them perfect – but the educational institutions are willing to adjust them if there is a signal they should do so. The first proposals for changes in the undergraduate vocational programme have arrived at the Ministry of the Economy, trying to make the programmes meet the new needs of a more customer-oriented offer and the specifics of the Slovenian tourism offer as a whole. For this reason, next year a special programme for casinos will start at the Turistica, meeting the needs of the gambling industry.

Both schools or educational institutions and the Chamber of Commerce, which is the representative of the tourism industry, can initiate proposals for change.

3.1. Secondary educational programmes

A relatively new form of vocational secondary education has been introduced, called ‘the dual system’. Students finishing this kind of education are highly skilled and can immediately deliver full results. Their theoretical knowledge is lower than the knowledge of students in the 3-year vocational secondary education.

In the school year 2001/2002, the students in all secondary schools for tourism and hospitality for the first time do not have the possibility of passing the ‘matura’ examination. This decision, taken by the Ministry of Education, Science and Sports, of course bears consequences. Young people with the best results in primary school (duration 8 years, age of 14 to 15 when completing) practically never choose a secondary school that does not offer the alternative of passing the ‘matura examination’ at the end of the fourth year. This means that mostly less skilled or/and less diligent pupils decide to study tourism and hospitality from secondary level on.

At the same time, a consequence of demographic changes in Slovenia can be observed: from year to year, there are fewer young people coming from the primary schools. The dispersion to different kinds of secondary schools is completely changing. If some years ago fewer than 50% of the population finishing the primary school could enrol into a grammar school, in the school year 2001/02 approximately 60% of young people got a place in one of the grammar schools. This means that fewer young people are deciding to choose vocational secondary schools; tourism and hospitality programmes are no exception. In the last three years, one half of the ten existing vocational secondary tourism and hospitality schools could not offer the vocational programme for waiters because the interest was too low to carry out the programme ‘waiter’.

Consequently, a crisis can be foreseen. A deficit in some tourism professions, e.g. ‘waiter’, will appear in the near future. Additional difficulty can be observed in border regions, where young people often decide to take employment in Austria because of a more attractive salary. To get enough waiters, the Slovenian hotel and catering industry will soon be obliged to ‘import’ waiters from our southern neighbouring countries as was the case years ago. Slovenia is financially as attractive for people coming from, for example, Bosnia and Herzegovina, as Austria is attractive for Slovenian employees. With regard to this,
salaries for waiters in Slovenia have to be thought over, and a system of additional advantages would have to be introduced for well-skilled staff willing to make sacrifices in the peak of the season and/or day.

Different irregularities can be observed due to this changing demographic situation: as there is still a limited number of places for the vocational programme ‘cook’, pupils who had lower grades in their primary-school report are refused (if the number of applicants exceeds the number of available places, a better school report is the criterion for acceptance to the school). After the decision that no ‘matura’ examination is possible at the end of the 4-year technical programme, fewer pupils decide to enrol into the 4-year technical programme. If now someone is refused in the 3-year vocational programme (because of low success at primary school), he/she can enrol into the 4-year programme, which requires much more skills and a better background knowledge, because there are vacant places in the 4-year programme. There are cases when from two starting classes in the first school year only one reaches the final fourth class.

After the four-year secondary programme, the students can continue their studies in a 3-year undergraduate vocational programme. These students have noticeable lower skills and lower cognitive abilities than students coming from grammar schools. As the general level of expectations at the secondary school has to be reduced (lower input knowledge from the primary school), students coming to colleges from these schools are hardly capable of doing research work and they need much more effort and time than students coming from grammar schools to master the programme. This is a shame, since it is tourism itself that we call the most interdisciplinary sector of the economy. The students would need very varied and broad background knowledge. They urgently need to find time to attend some additional courses during their studies (like languages, art, history), which is not possible in this way, because such students have to work very hard to get through the exams – with average or rather low marks.

Thus, the Slovenian tourism industry loses the best possible people – the final exam makes it only possible to continue studies in a post-secondary (2 years of study) or higher undergraduate (3 years) vocational school. Access to a university is possible if these students pass a preparatory year at the university or if they decide, as already mentioned, to add an additional year to the secondary schooling and attend classes to pass the ‘matura’ examination.

Graduates from the 3-year secondary vocational programmes (cook and waiter) can find employment in any restaurant or hotel. Their skills are basic; the final certificate guarantees a solid level of experience won through the practical part of this vocational education, which allows immediate full participation in business. The profile is fitting to the needs of most SMEs for the two professions described (cook and waiter).

Graduates from the 4-year secondary technical programme are more administratively oriented. They can be employed at the reception of a hotel or as members of the lower management of a hotel or travel agency (or tour-operator). If they own their own business, they can manage (after some additional experience of “learning by doing”) all the administrative and managerial work of the small business (e.g. travel agency, small restaurant, a café or a snack-bar). The graduates finish their school as relatively young persons, so it is very important for the success of the management of the enterprises to let them attend, from time to time, different courses in tourism and hospitality in order to adjust their knowledge and skills to the needs and trends of the market.
Secondary School of Catering and Tourism in Maribor

The management of the Secondary School of Catering and Tourism in Maribor was kind enough to make an investigation for the needs of this paper: the students in the final classes were interviewed about what their intentions were after completing the school.

The interview was carried out in the classes of the 4-year technical educational programme (possibility of continuing the study in a 2-year post-secondary or a 3-year undergraduate programme or one additional year + ‘matura’ examination and then in a 4-year university programme).

The management of the School was surprised by the results of the investigation: an unexpectedly high percentage of students intend to spend one more year in the secondary programme in order to be able to qualify for a 4-year university study (after having passed the ‘matura’ examination). As there is no specific university study of tourism, most of them intend to leave, at least for the duration of the study, the tourism sector.

Table 4: Interview about further studies among the pupils of the Secondary School of Catering and Tourism in Maribor

<table>
<thead>
<tr>
<th>Class units</th>
<th>4A</th>
<th>4B</th>
<th>4C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-secondary vocational college for hospitality and tourism (Maribor or Bled)</td>
<td>0</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Turistica – 3-year undergraduate vocational tourism programme</td>
<td>10</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>Faculty of Business and Economics in Maribor – tourism</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Faculty of Business and Economics in Maribor – other courses</td>
<td>3</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Additional year – matura course</td>
<td>11</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>Employment at home (own business of the parents)</td>
<td>6</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Leaving tourism and hospitality*</td>
<td>11</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Students in the class unit</td>
<td>25</td>
<td>26</td>
<td>22</td>
</tr>
</tbody>
</table>

*Leaving tourism and hospitality means choosing a new profession out of tourism or attending another year of secondary school in order to pass the ‘matura’ examination – the number of responses in this way exceeds the number of pupils in each class unit. The interview was carried out in November 2001.

3.2. Post-secondary vocational education

Programme ‘Tourism’

Bled is the only post-secondary school in Slovenia that offers a 2-year programme for tourism – and even this is too much (in the school year 2002/03, the programmes will be carried out in Maribor and Ljubljana, too). Most of the students finishing this vocational programme cannot find employment in the tourism sector, as already described in chapter 1.2. Perhaps in time the situation will improve. After Slovenia’s independence, an immense number of sales agencies were founded (over 700 for only 2 million inhabitants), partly
with an inadequate offer and with unskilled employees, incapable of operating the business profitably and to the customer’s satisfaction.

In the meantime, regulations and minimal quality claims (like minimal education of employees, obligatory licences for travel agencies, tour operators and tourist guides) were issued by the competent ministry, which has led (and will continue to lead) to a smaller number of agencies. Through their mergers – one of the possible ways of development in the tourism market of Slovenia – some bigger agencies will exist on the market with several departments that will allow some kind of specialisation of employees. Another, perhaps even more logical, development is possible (because of the question of ownership); namely, some individual agencies will highly specialise and will provide a high quality niche offer for certain segments, both in tourism and in the hospitality sectors.

Programme ‘Hospitality’

Due to the shortage of waiters, everybody completing this vocational training can immediately find a job. There is even a possibility to choose the enterprise a waiter wants to work for. Graduates from the post-secondary studies are skilled to become chiefs of service or to take over other duties at middle management level.

Not all graduates finishing the programme ‘cook’ in post-secondary vocational education can get an appropriate job immediately. As ‘cook’ is a profession with good employment opportunities, graduates can accept any employment for lower skills, e.g. as ‘ordinary’ cooks when finishing the programme. They can then look, from their working post, for a post of chef cuisinier or for a better paid job as a highly qualified specialist in one segment of cooking (specialisation for desserts, parties – cold, buffets etc).

Students finishing this kind of vocational education can become employed practically anywhere: their very good and high-level skills are welcome in larger hotels or restaurants, as well as in SMEs. The engagement of such a highly skilled labour force in micro SMEs only makes sense in restaurants that have decided on a high quality offer (meaning specialisation), which permits these graduates to fully implement what they have learned in their horizontally extensive programme (additional skills like ‘cook for fine sauces’). In really small ordinary restaurants or in ‘mass production’ ones (like pizzerias) the graduates from these programmes usually cannot find opportunities to apply everything they have learned, and the question is if such restaurants can afford to hire and to pay – but not to use – their additional knowledge and skills. The same can be said for the profession ‘waiter’.

3.3. Undergraduate vocational education

The Ministry of Small Business and Tourism (now Ministry of the Economy) has commissioned a study to define the suitability of the programmes of post-secondary and undergraduate vocational programmes in tourism regarding the needs of the tourism industry. There were mostly hotels that responded to the questionnaire.

The results were very interesting and in addition to answers to the questions, suggestions were made to the interviewers. Most of the interviewees were seeking more immediately applicable knowledge from the graduates. Smaller enterprises (up to 10 employees) asked for some kind of an “all-rounder” profile for tourism that would deliver managers who are able and willing to work hard themselves when there is a need and who, at the same time, would have basic skills for strategic planning and thinking and skills in the field of marketing and communication as well.
Graduates in this programme can be employed in small and medium sized enterprises as well as in bigger tourism businesses. As the programmes we described are relatively new, after some time they will need to be completed or/and adjusted to the needs of the changing conditions on the market. What the industry is missing from young graduates is enthusiasm. They often join the enterprise with a misconception that they could immediately become CEOs. Perhaps this should be checked first, both in the programme and by means of awareness building in the educational processes.

A special problem concerns the education of educators. Like elsewhere in the world, Slovenia has a shortage of well-skilled educators with an academic background (Cooper et al, 1996/204). In future, more concern must be devoted to ‘train the trainer’ courses.

3.4. Training Centre for Tourism

Some 96% of all tourism businesses in Slovenia belong to the SME sector. Most of them, over 98%, have 10 employees or fewer (micro segment). This means that every employee in the enterprise is urgently needed at his/her working place day after day. In this way, through day-long training or training spread over more days, the following problems have to be solved:

- How can additional (life-long) learning or training be assured for this segment?
- Is additional training in this segment possible at all? (Including the problem of the costs of additional education and training)
- Can ‘training on the job’ be a solution for the segment of SMEs?
- Which educational institution is capable of organising such an offer for the very diverse needs of all niche-enterprises in the SME tourism and hospitality sectors?
- Can a viable solution be found within the WTO (the varied offer of the HRD section within the WTO)?

There are two major problems accompanying the segment of micro SMEs: time and money. For micro SMEs, vocational training can only be carried out when offered in the ‘calmer time’ of the day / of the week / and of the year. Training for micro SMEs must be offered for small groups of about 12 participants, which allows them to exchange experiences and ideas. The potential participants can only be informed through direct mailing. Contracts like those with a spa or with a bigger hotel (with which the Training Centre is currently mostly working) are, the in case of small SMEs, not possible (Sirše, J. et al, 1999).

One single medium-skilled person can manage a little street café very well. If this person attends a seminar, the café must be closed down or a replacement has to be found for the time of the seminar, which means a loss for the owner in the form of absence of earnings or costs for personnel. Unfortunately, nobody is speaking of the opportunity costs. Therefore, when offering vocational training or seminars for this segment, the main stress must be put on short seminars, which inform the participants in a very compact way about the topics they have not learned at school. To reach these persons, the offer must be attractive, comprehensive and the participants must see a clear benefit from attending the seminar.

There is one more problem. Only in exceptional cases can very short seminars (1/2 day or less, meeting the needs of micro SMEs) offer the acquisition of new skills – which is exactly what the SMEs mostly need, rather than theoretically-oriented seminars. A solution should be found for this kind of problem as well.
4. Conclusion

In Slovenia, the educational system for the needs of the tourism industry will have to be reorganised and extended. After the changes in the secondary school segment that does not foresee a ‘matura’ examination in tourism and hospitality secondary schools, which, at the same time, is the condition for students to start a university programme, the tourism industry in Slovenia will have to source its top management from students graduating in any other faculty but tourism. The lack of an appropriate university programme and possibilities for the postgraduate study of tourism still worsen the problem – the level of specialist tourism skills would, thus, remain significantly behind the average of other industries.

For the tourism and hospitality sector, many questions need to be answered, such as:

- Can someone with very low (or even without any) professional skills clean a 4- or a 5-star hotel well enough?
- Is there a sound future for the Slovenian tourism and hospitality industries if the education and the skills of the employees are not going to be raised considerably within a short time?
- Can we just let it be when the best young people leave the tourism and hospitality sector (the decision to abolish the ‘matura’ examination at secondary schools for catering and tourism)?
- Can we allow low skilled pupils from primary schools to enter the technically-oriented 4-year programmes and lower the standards / criteria / expectations in order to let them pass the school?
- Is it advantageous or not if the top management in tourism has any other education than tourism (as the effect of the absence of undergraduate university and postgraduate tourism studies)?

Suggestions concerning the education and training for tourism and hospitality

To improve the situation, the suggestion is urgently to:

- Re-introduce the ‘matura’ examination in the secondary tourism and hospitality schools;
- Concentrate on further PR actions\(^{10}\) to attract the attention of more young people and their parents;
- Launch an attractive grant policy for pupils and students in deficit professions, which would oblige them to stay in the profession at least for some years – with the chance that they would like their profession and stay in it;
- Assure comprehensive conditions and possibilities for the continuation of vocational education from a dual-system certificate up to postgraduate vocational specialisation,
- Assure smooth conditions for education conversion within the tourism and hospitality sectors from secondary level up to university postgraduate studies;

\(^{10}\) The Centre for Vocational Education (Center za poklicno izobraževanje) is currently carrying out a project called “Development of interest for vocational professions in catering and tourism”, addressed to primary-school graduates and their parents. The tourism and hospitality industry and the Chamber of Commerce support this project.
• Develop a postgraduate specialist vocational study of tourism and hospitality;
• Extend to a university study the economic programme with the possibility of choosing some optional tourism subjects, bringing more tourism specific courses into it, although remaining an economics programme;
• Develop a master’s degree and a doctoral study for tourism and hospitality.

Concerning the SME problematic:

Due to unskilled employees in low-paid professions of the hotel and catering sectors and to the inadequate occupation of posts by people with insufficient skills, Slovenian tourism and hospitality sectors have a very high rate of low-educated and low-skilled employees. On the other hand, the tourism offer can only be as good as the less skilled human link in the chain of people responsible for the final product. (If, for example, the cleaning personnel do their job in the bathroom badly, the guests will soon forget the delicious dinner – they will not be satisfied with the offer as a whole).

People owning a small business often encourage their children to enrol in undergraduate vocational programmes of tourism and hospitality in order to “do the work better” than the generation who started the business. But the skills they are looking for (practical guidance and directives for every-day business-life in a SME) are not included in the programmes of the educational institutions in Slovenia to a sufficiently large extent.

Tourism and hospitality industries, especially SMEs, are therefore forced to look for additional training for their employees in the free educational market. Currently, practically no offer for very short seminars exists on the educational market to meet the needs of the tourism and hospitality sectors.

Problems related to skills that are lacking are often moral dangers and unprofessionally done work, which are worsened through the usual attitude of employees in tourism towards the owners of the establishment AND towards the tourist: employees are expected to act as servants. Being dependent on tipping still deepens this problem. An appropriate salary for good work, based on good education and life-long training would help the employees, the entrepreneurs and the tourists.

REFERENCES

Cooper, Ch.; Shepherd, R.; Westlake, J., 1996: Educating the Educators in Tourism: A Manual of Tourism and Hospitality Education; WTO & The University of Surrey


Jelenc, Z., 1991: Terminologija izobraževanja odraslih, Pedagoški inštitut pri univerzi v Ljubljani

Sirše, J. et al, 1999: Analiza razkoraka med dejansko usposobljenostjo zaposlenih v slovenskem turizmu in potrebami glede na standarde v EU in WTO, NTZ Ljubljana

MŠŠ, 1997: Strokovna izhodišča za nacionalni program visokega šolstva v Republiki Sloveniji, MŠŠ Ljubljana

MŠŠ, 2001: Razpis za vpis v višje strokovno izobraževanje v študijskem letu 2001/2002, MŠŠ Ljubljana
MŠŠ, 2001: Razpis Univerze v Ljubljani, Univerze v Mariboru in samostojnih vi-
sokošolskih zavodov za vpis v študijskem letu 2001/2002, MŠŠ Ljubljana
NTZ: Katalog izobraževalnih programov 2001, NTZ Ljubljana 2001
SURS, 2001: Statistical Annual 2000, SURS Ljubljana
SURS, 2000: Zaposlene osebe v podjetjih in drugih organizacijah po stopnji strokovne
izobrazbe in dejavnosti, Služba za izobraževanje GZS, Ljubljana
ZIRRUM, 2000: Ustreznost višješolskih in visokošolskih izobraževalnih programov na
področju turizma v Republiki Sloveniji, ZIRRUM Maribor
www.vgs-bled.si, 1.11.2001
www.turistica.si, 1.11.2001
Official Gazette of the Republic of Slovenia No. 12/96
A marketing approach
to catering oriented personnel education

Marcel Meler,* University of Osijek
Drago Ružić, University of Osijek
Jure Kuprešak, Catering and Tourist Trade College, Zagreb

Abstract

Education in general, especially vocational education, should optimally qualify the members of a society for the intensive economic changes we testify to and for those that can be expected. Of course, these changes are also evident in the tourist trade, especially in the catering field. In addition to these changes, corresponding to the economic importance of the tourist trade for the Republic of Croatia, the educational system is confronted with the task of providing for the necessary qualificational and qualitative personnel structures that will be able to make the tourist trade system efficient, to maintain its efficiency, and to realize its sustainable competitive advantage. It is not an easy social assignment to provide personnel qualified in the fundamental skills, with developed capabilities and human quality, in order to satisfy all the personnel needs in the tourist trade of the Republic of Croatia. What is necessary, therefore, is marketing-consideration synergy, utilization of techniques, as well as institutional coordination, so as to secure a system able to respond to the aforementioned demands and to be flexible with regard to the expected changes. Thus, a priority goal within the educational system should not be the adoption of a large quantum of educational content, but more the development of the logical and creative abilities of an individual, as well as the adoption of a part of general and especially vocational educational contents necessary for working processes. As a follow-up to the aforesaid premises, the paper especially discusses a marketing approach to the education of catering-oriented personnel.

Keywords: catering, dual educational system, education, educational system, marketing in education

* Marcel Meler, Osijek Faculty of Economics, Gajev trg 7, telephone +385 31 22 44 10, fax +385 31 21 16 04, e-mail: marcel.meler@os.tel.hr.
1. APPROACH ORIENTED CONSIDERATIONS

For the Republic of Croatia, the tourist trade represents one of the priority economic activities and an essential streamline of economic development. Thus, the Republic of Croatia is also forced to develop its economic perspective on the very demanding international tourist market, which is becoming increasingly competitive day by day. Namely, contemporary tourism is developing rapidly. Although its dynamic development began in the middle of the past century, by the mid-80s tourism could be observed as one of the points of support of the world’s economic development. Among the tourist destinations, an increased supply diversification is obvious, as well as the emphasis laid on recognizable cultural and natural qualities, in an increasing campaign for potential consumers. The competition is evident among the countries that offer a similar tourist product to equally or similarly spatially encompassed demand segments. It is the case with the Mediterranean area, to which the Republic of Croatia is affiliated as well, which predominantly offers the Western European market a tourist product for summer vacation.

The service quality provided by the employees in the catering trade is of an irreplaceable importance in such competition where “money value” can be characterized as an essential element. In tourism it is especially evident, since the tourist trade represents a fusion of service activities, dominantly comprised of the catering trade and tourist mediation, but also encompassing commercial, traffic and communication services, crafts and trade services and those in other activities, which also directly or indirectly meet the tourist consumers’ needs. Consequently, the Republic of Croatia’s educational system is confronted with a difficult task to assure a staff basis, especially in the catering trade, to meet, both qualitatively and quantitatively, existing as well as future tourist consumers’ needs.

One should also emphasize that the human factor is directly or indirectly incorporated in a catering trade product. Namely, when pondering the catering-trade products, the total-product approach is acceptable, according to which everything offered on the market can be observed as an integrity of material (palpable) and immaterial (impalpable) elements. In addition to the services, these total-product components (partial elements) may be also presented by certain psychological or symbolic elements contained in the product, which may be the result of promotional activities. It pertains, of course, to a special psychological atmosphere created round certain products thanks to their brand, commercials, the image achieved, etc.

The catering trade is a “human industry” and therefore the personnel is an essential component of the catering trade product, thus also one of the most important elements of product quality. It is especially important when it comes to the catering trade personnel operational in the processing of partial catering products and services, whereby the personnel de facto becomes a constituent part of variously integrated catering products and services. For example, a cook at his working post may be described as a “production” worker of a very broad “productional” spectrum, producing by flexible technology and by the utilization of a huge and versatile mass of input components of unequal quality. The products he “produces” satisfy primary human needs, are consumed at the site, directly subsequent to the “production,” no stocks are “produced,” the “production process” is relatively short, the production is a discontinued one, etc. (Ružić and Kuprešak, 1998). Equally, the products “produced” obtain their valorization in a market of competitive dishes by virtue of their quality and price. These products may be even more closely defined: they are the components processed in usual technological processes, found in the experience-
correspondent ratios that have to be harmonized with the needs, habits and potential consumers’ desires. In their final form, these products have to possess the quality characteristics demonstrated by their gastronomical features: an appropriate taste, challenging aroma, attractive look, an adequate serving temperature, optimal quantity and adequately served. All these characteristics are in the function of the price the potential guests are ready to pay in certain circumstances (board and lodging, à la carte, festive occasion, etc.).

It is obvious that a cook should possess special skills in the preparation of dishes, so that these products are always personally marked. Generally, one may say that a cook needs:
- technical-technological skills;
- special gastronomical-culinary proficiency;
- an expressed working routine.

Distinct from a cook, a waiter is a “pure service” processor. These jobs are sometimes underestimated as a result of superficial observation when it comes to the content of this vocation. Frequently, a very demanding specialist proficiency necessary for this profession is neglected. Predominantly, this implies the following:
- skills in guest reception;
- foreign languages proficiency;
- sales-conversation structure and technique;
- various serving techniques skills and the like.

With regard to the waiter’s service, the focus is on the know-how and skills demonstrated, corresponding to the marketing notion of the satisfaction of the guests’/consumers’ needs and desires. A waiter’s service is often estimated more on an emotional than on a rational basis. Thus, the priority is given to the language proficiency (communication techniques, mother-tongue and foreign languages).

In any case, even on the basis of the aforementioned parameters, it is obvious that the demands confronting the catering trade staff, especially those whose activities are incorporated in the creation of catering products, are very specific, which equally implies the existence of an adequate educational system able to fully meet these, and even projected, demands.

2. THE PRESENT EDUCATIONAL SYSTEM IN THE CATERING TRADE AND TOURISM IN THE REPUBLIC OF CROATIA

The present educational system in the catering trade and tourism in the Republic of Croatia comprises secondary school education, qualification programmes, training programmes and higher education.

It is worth emphasizing that the educational system in the catering trade shared the sad destiny of the overall educational system in the former state, whose consequences are partially felt even today. In that context, one should remember that especially detrimental was the 1974 educational system reform. That “reform” was based on party-member documentation, having as a result significant changes in secondary school and higher education.
At that time, the following changes were effectuated in secondary school education:

- classic schools were abolished: grammar schools, technical schools, and vocational schools;
- the schools were integrated and congenial omnivocational curricula introduced: the preparatory phase in the first two years of secondary education;
- the vocational (professional) programme started with the third year of secondary education and lasted for the next two years;
- the education for certain vocations was extended: the former vocational-school education was extended from three to four years.

The curricular corrections pertinent to the so-called “directed” high-school education were established as early as in 1981, so that the vocational education, and thereby also the narrower vocational subjects in the first and the second grade, was introduced from the first year, which should have met the demands and needs of the then “associated” workers’ organizations, but in practice the preparatory degree was abolished.

On the other hand, more intensive discussions on the alterations of this educational system were initiated as early as in 1989, so that they were abbreviated to the Draft Project Pertaining to the Changes in the Secondary-School Education of the Socialist Republic of Croatia in October that year. The more or less futile discussions lasted up to the beginning of 1990, with everything ending in the Croatian Parliament’s refusal (in the last call of the then-existent state) to approve the amendments proposed.

After the establishment of the Ministry of Education and Culture in the new state, numerous steps forward were taken. The so-called “self-governmental interest group” financing mode was abolished, a switch toward “funds” effectuated, and in parallel the work on the adoption of a proposal pertaining to the “change of the Republic of Croatia’s secondary school education system from the school year 1991/92” and the “proposal for the promulgation of a high-school education act, with a high-school education bill” were initiated.

In 1991, Changes in the Republic of Croatia’s Secondary School Educational System from the School Year 1991/92 were adopted by The Institute for the School System. For that time, these changes were quite radical:

- joint curricular bases were abandoned in the first two grades of secondary education, being identical for all types of educational programmes pertinent to the acquisition of an equal degree; a scheme of programme verticals for certain secondary school types, incorporating general and vocational instructional subjects in their curricula was adopted;
- the following school types emerged: grammar schools (general, language, classic and the science-mathematics one), art and vocational schools. Within the vocational schools, there were technical (engineering) and congenial secondary schools (having a four-year and, occasionally, a three-year programme), as well as three-year industrial and two-year crafts and trades schools.

According to the changes, the catering and tourist trade professions can be found in two secondary school types: the programme for Hotel and Tourist Trade Technician conducted in “technical and congenial schools,” as a four year programme; and the programmes for Catering and Hotel Trade Professions (ship cook, cook, confectioner and waiter) are conducted in the “vocational schools for industry and economy oriented professions.”
Since the introduction of the new educational system in 1991 up to nowadays, no significant curricular changes have been made. However, in addition to the curricular contents, which are the most essential factor of the system, the material as well as the conditions related to staff are also important. It seems that it is precisely the material and staff related conditions that are the limiting factors for significant steps forward.

The experts’ experience shows that the fundamental problems confronted by vocational schooling in the Republic of Croatia are the following (The Improvement of Secondary School Education for the Needs of Croatia’s Hotel and Catering Trade, 1998):

- huge dispersion of polyvalent vocational schools, with multiple vocations (e.g., commerce and tourism, catering trade and crafts and trades, and the like);
- inappropriate relation between the general and vocational instructional subjects;
- insufficient number of internship hours and inadequate apprenticeship quality;
- inadequate lecture-room and apprenticeship workshop equipment;
- lack of a high-quality staff in polyvalent schools, as well as the problem of a permanent staff post-education;
- inappropriate degree of students’ qualification for independent professional activities upon graduation.

2.1 Middle-School Education

Subsequent to all previous changes, the middle-school education for the needs of tourism and the catering trade in the Republic of Croatia is nowadays organized as classic three-year and four-year vocational education (regular and adult education—evening courses) (Table 1) and as a dual system pertinent to the crafts-and-trades professions (cook and confectioner).

The curricula in the three-year classic system are conceptualized in such a way that a student acquires 70% of general theoretical and practical knowledge in the school and 30% in an out-of-school catering or tourist facility. In the four-year system, the curricula are conceptualized so that a student acquires 82% of theoretical and practical knowledge in the school, while the rest, amounting to 18%, is acquired in an outbound catering or tourist facility. The educational programmes pertaining to the hotelier and hotel and tourism trade technician overlap, but the four-year hotelier-education programme is actually a new one, adapted to the needs of the catering and tourist economy. The hotelier-education programme has been created due to the necessity to enable a vertical progression pertinent to the students attending the cook, waiter, and confectioner qualification programmes. This programme has been functional for only a couple of years, devised according to the same or similar programmes in the West European countries where tourism is well developed.

In the dual educational system, we have a vice versa situation with regard to classic education. Here, pursuant to the programme and a contract concluded, a student realizes 70% of his/her apprenticeship with a craftsman, while 30% of the programme apprenticeship contents, pertinent to the vocational-theoretic instruction, are realized in the school. In the school year 2000/2001 the first students’ generation graduated within the dual system framework, so the efficacy evaluation of this educational subsystem is yet to come. In any case, by virtue of the introduction of the dual system, the craftsmen have assumed a major obligation and responsibility for the education of young people and for apprenticeship quality assurance.
Table 1: Catering and Tourist Trade Professions in Middle-School Education

<table>
<thead>
<tr>
<th>A) FULL TIME EDUCATION</th>
<th>I. Three-year education</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Classic system</td>
<td></td>
</tr>
<tr>
<td>Cook</td>
<td></td>
</tr>
<tr>
<td>Waiter</td>
<td></td>
</tr>
<tr>
<td>Confectioner</td>
<td></td>
</tr>
<tr>
<td>II. Dual system</td>
<td></td>
</tr>
<tr>
<td>Cook</td>
<td></td>
</tr>
<tr>
<td>Confectioner</td>
<td></td>
</tr>
</tbody>
</table>

II. Four-year education

<table>
<thead>
<tr>
<th>Hotelier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel and tourism technician</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B) ADULT EDUCATION-EVENING COURSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cook</td>
</tr>
<tr>
<td>Waiter</td>
</tr>
<tr>
<td>Confectioner</td>
</tr>
<tr>
<td>Hotelier</td>
</tr>
<tr>
<td>Hotel and tourism technician</td>
</tr>
</tbody>
</table>

| three-year education           |
| three-year education           |
| three-year education           |
| four-year education, one-year post-education |

<table>
<thead>
<tr>
<th>C) ONE-YEAR POST-EDUCATION PROGRAMME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master cook specialist</td>
</tr>
<tr>
<td>Master confectioner specialist</td>
</tr>
<tr>
<td>Master waiter specialist</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>D) TRAINING PROGRAMME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist guide</td>
</tr>
<tr>
<td>Sommelier</td>
</tr>
<tr>
<td>Barman</td>
</tr>
</tbody>
</table>


On the other hand, the secondary school curriculum for the needs of the tourist and catering trade in the Republic of Croatia is being realized in 64 schools. Nine schools thereof are specialized, i.e., they implement exclusively a catering and tourism oriented programme, while the rest are polyvalent, multivocational and multiprogrammatic schools. These data direct us toward the fact that the network of schools with catering-touristic programmes is fragmented and dispersed. If we bear in mind the fact that the education of catering and tourist trade personnel necessitates the existence of specific equipment (laboratories), increased material instructional expenditures, and the availability of professional staff, the conclusion is that the quality of such a network is very questionable. The fact that the number of students per school facility, when compared to that of the Republic of Croatia, is 2.4 times larger in the Republic of Slovenia, 2.7 larger in Austria, and 1.9 times larger in Italy contributes to such a conclusion (The Improvement of Middle-School Education, 1998).
Table 2: The Number of First-Grade Enrolments in school years 1998/99 and 1999/2000

<table>
<thead>
<tr>
<th>FOUR-YEAR PROGRAMME</th>
<th>THREE-YEAR PROGRAMME</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Year</td>
<td>School Year</td>
<td>School Year</td>
</tr>
<tr>
<td>1,762</td>
<td>1,862</td>
<td>3,477</td>
</tr>
</tbody>
</table>

Source: Data retrieved by the Ministry of Education and Sports of the Republic of Croatia

The fact ensuing from the data in Table 2 is that, for a couple of years, over 4,000 students have completed the catering and tourism-oriented four- and three-year vocational programmes. (It is important to know that 10 - 15% of those enrolling never graduate from the school.) If the students continuing their education (as an average, 55% of graduates that have attended a four-year programme and 15% of students that have attended a three-year education) are subtracted from that figure, we obtain an approximate number of 3,000 graduates who search for employment annually. An approximate graduate structure can also be analyzed through the structure of enrolments.

Figure 1: Share of Students Based on Profession in the Catering and Tourism Trade of the Republic of Croatia in the School Year 1999/2000

<table>
<thead>
<tr>
<th>Profession</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confectioner</td>
<td>8%</td>
</tr>
<tr>
<td>Hotelier</td>
<td>10%</td>
</tr>
<tr>
<td>Waiter</td>
<td>20%</td>
</tr>
<tr>
<td>HT technician</td>
<td>30%</td>
</tr>
<tr>
<td>Cook</td>
<td>32%</td>
</tr>
</tbody>
</table>


Unlike the late 1980s, when unemployed catering professionals were almost nonexistent, the situation is quite different today. From Table 3 it is evident that a significant number of unemployed is present in all catering and touristic vocations.
Table 3: Unemployed Catering and Tourist Workers in the Republic of Croatia on Sept. 30, 2001

| No. | PROFESSION TITLE     | NUMBER OF REGISTERED UNEMPLOYED PERSONS IN THE REPUBLIC OF CROATIA  
|-----|---------------------|---------------------------------------------------------------------
|     |                     | TOTAL | FEMALES |
| 1.  | COOK                | 6,300 | 3,495 |
| 2.  | WAITER              | 7,083 | 2,877 |
| 3.  | CONFECTIONER        | 524   | 450   |
| 4.  | TOURIST TECHNICIAN  | 2,814 | 2,233 |
|     | TOTAL               | 16,721 | 9,055 |

Source: Data retrieved by the Republic of Croatia’s Employment Institute on Sept. 30, 2001

One should know that, according to forecasts, the needs of the Republic of Croatia’s economy pertinent to personnel with middle-school education in the tourist and catering trade in the next ten years could be met by a number of graduates on average not exceeding 4,100 per annum (The Improvement of Secondary School Education, 1998).

2.2 Tourist and Catering Trade Oriented Vocational and Higher Education

In accordance with the Higher Education Law (Official Gazette, NN 96/93 and 59/96), two- and three-year professional studies are conducted in the Republic of Croatia. The tourist training colleges are located in Opatija and Šibenik, and the Dubrovnik-based American College of Management and Technology. Also, within the Tourism Institute, the Hospitality Management College has been established in Zagreb (since the academic year 2001/2002). Additionally, in the form of dislocated studies, the Le Bouveret-based César Ritz Hotelier Institute’s César Ritz College in Zagreb offers professional studies in the fields of hotel and catering trade management.

It is obvious that in the Republic of Croatia there is no college educating students for operative management, e.g., in the fields of gastronomy, operative kitchen and hall management, or pertaining to small-sized catering or tourist business. In contrast, colleges and higher education institutions with gastronomy in a narrower or in a broader scope of their curricula exist in neighboring countries. A good example is provided by the neighboring Republic of Slovenia, which has a two-year catering management programme, representing a vertical series of basic catering and tourist trade vocations.

In the Republic of Croatia, the vertical component in catering trade professions is connected to vocational qualifications, such as master chef specialist, master waiter specialist, and master confectioner specialist. The education lasts for two semesters, and subsequently the students acquire a public “certificate” pertinent to the acquisition of the aforesaid vocational titles that are inscribed in working documentations. This qualification is under the jurisdiction of the Croatian Ministry of Education and Sports, not its Ministry of Science and Technology. On the other hand, obviously due to internal inertia within the Republic of Croatia’s educational system and the failure to recognize future, or even current, tourist-market demands, international institutions of higher education have launched their pro-
grammes in the Republic of Croatia. Thus, the Hotelconsult César Ritz College from Le Bouveret, Brig, Switzerland, offered the following hotel and catering management studies via newspaper advertisement in October 2001:

- a two-year hotel management studies for high school graduates (Swiss Hotel Management Diploma, or the American Associate of Science Degree in Hospitality Management);
- a three-and-a-half-year BA studies (Bachelor of Arts Degree in Hotel and Restaurant Administration);
- one-year postgraduate studies for all candidates having an uncongenial BA degree but being interested in hotel- or catering-industry management (Postgraduate Diploma in Hotel and Restaurant Administration);
- one-year postgraduate studies (Master of Science Degree in International Management).

The question emerges whether the Republic of Croatia is willing and capable of establishing similar studies, and what the realistic limitations are. It is obvious that the lack of marketing based considerations and improvements in tourism, or specifically catering-oriented, educational system represent some of the key problems.

3. MARKETING BASED DEMARCATIONS OF AN EDUCATIONAL SYSTEM

Education should optimally capacitate members of society for ongoing or anticipated social changes. Thus, the individual’s needs are satisfied and, as feedback, so are those of society. In that sense, through education, an individual gains significant awareness of the necessity of social changes but equally that he may also actively participate therein. Marketing in education has certain specificities, emanating from the following (Meler, 1994):

a) a product that is actually apparent in the form of an intellectual service has to be inevitably observed as a total product, i.e., as an integrity of material and immaterial elements;

b) the product price is usually indirectly paid;

c) man-to-man commercials represent the best way of promotion, combined with personal observations and personal expectations;

d) the decision-making pertinent to a product is a result of exclusively rational, not emotional motives;

e) the once-acquired loyalty toward a specific educational institution (or, better phrased, to its type) is with relative difficulty abandoned in a horizontal direction, but it is very frequent vertically.

In an educational system, the programmes have to be harmonized within a vertical system:

Preschool Education → Elementary School → High School → Higher Education
The educational process should be based on scientific understanding, i.e., on research results, the main objective being their transfer in daily economic practice. That means that we should have the following flowchart:

\[ \text{Science} \rightarrow \text{Educational Process} \rightarrow \text{Economic Practice} \]

The level of educational development is directly dependent on the overall economic development and qualitative development of socioeconomic relations in a concrete country. One should emphasize that interactive educational feedback with regard to these two determinant factors also exists.

The introduction of market relations in education also presupposes expenditure participation by a party in the educational process. That implies that any participant in an educational process decides primarily independently whether to consciously invest in himself and thus be, at least temporarily, deprived of an investment in other material or immaterial goods with which the secondary needs of the individual are satisfied. Simultaneously, it still provides an individual, though depending on his overall material capacities, with the possibility of choose among various educational possibilities, i.e., among different types of educational “products.” Thereby, the individuals, who are, thanks to their predispositions, ready to develop their potentials and realistic capabilities, will be more or less identified, while the benefit therefrom will be enjoyed primarily by themselves, and finally also society as a whole. Observed as an entirety, education as an activity will achieve an increased effectiveness, and the finances, to be extracted by the state to a slightly lesser extent, will be utilized more rationally.

Namely, institutions compete for potential students. In order to survive, competitive strategies have to be formulated which satisfy the needs of potential customers. In other words, this sector of higher education needs to become more market oriented (Conway et al., 1994).

Based on concrete research results we can achieve curricular congeniality on one side and meet the desires and needs of its consumers on the other. Among other things, implied here is the establishment of the image of educational institutions, which should detect their advantage within the environment they are located in. The image of a certain educational institution is also considerably dependent on the degree of the rigour of admission-examination, which again can be reflected in the ratio of those enrolling and those admitted. However, a higher educational rating of an educational institution, and thereby a higher level of its image, are obtained only through the concentration of a high-quality and interdisciplinary qualified personnel.

An educational institution has an objective to maximally respect the present and especially the future social educational needs pertinent to the vocational education of a certain educational profile. In that respect, the elements of the educational process (instructional process, instructional technology, staff and equipment and financial possibilities) have to be set at such a level that the aforementioned goal is also optimally realized. Hereby, one should take the general economic rationality criteria into account, which implies that the effects of the educational process have to be larger than the expenses of its implementation, if observed from the aspect of society as a whole.
On the other hand, it is helpful for an educational institution to think in terms of six strategic variables (Shirley, 1983):
1. basic mission of the institution;
2. target groups of clientele to be served;
3. goals and objectives that the institution must achieve in order to fulfill its mission and serve the needs of its clientele;
4. the programmes and services offered (and relative priorities among them) in order to attain the goals and objectives;
5. the geographical service area of the institution;
6. the comparative advantage sought by the institution over the competitors engaged in similar activities.

Kotler and Murphy (1982) cite that a majority of the educational institutions are concerned with the notion of “doing the things right,” rather than that of “doing the right things.” They see the general notion of higher education planning being at three levels:
1. budgeting and scheduling;
2. short-range planning, e.g., recruitment and programme modifications;
3. long-range planning.

Strategic planning is the process of developing and maintaining a strategic fit between the organization and its changing marketing opportunities. Therefore, in order to be successful in the realization of its marketing goals, an educational institution has to develop both strategic and tactical marketing planning continually, the former relating to a more long-term inspection of the educational institution’s curriculum (at all study, i.e., activity, levels), its activity and business structure, as well as development possibilities, while the latter planning should be functional for the realization of the educational institution’s short-term goals, being in fact the phases of strategic plans.

If one wants to be successful in the aforementioned marketing planning and thereby also in the fulfillment of an educational institution’s marketing objectives, it is necessary to continuously effectuate its adaptation to the changes and to the macroeconomic trends observed within an activity environment. That implies that a series of organized activities is to be established, following the line stipulated (Kotler and Fox, 1995):

Environment → Objectives → Strategy → Structure → System

For example, that means that an educational institution has to primarily study the environment of its activity (its demographic, economic, political, technological, cultural and other characteristics), establish its possibilities and limitations within the environment, and develop its objectives to be striven toward in a short-term or a long-term perspective, based upon the understandings obtained. Thereby, one should opt for an appropriate strategy as an objective-achievement modality, and should establish an organizational structure that would be in the function of the strategy chosen. Finally, an appropriate analysis, planning, and control system as a support to the effective implementation of the selected strategy should also emanate therefrom.

In practice, however, the aforementioned parameters are implemented with difficulty, so that the following takes place:

Environment → Objectives → Strategy → Structure → System
That implies the operation in the 2002 environment with the objectives set in 1997, with a strategy set in 1993, with an organizational structure established in 1989 and a support system stipulated in 1987.

A situation is also possible wherein an irreversibility of the stipulated process occurs:

**Structure and System → Objectives and Strategy → Environment**

Thus, the only right way should be to anticipate an environmental situation, e.g., five years in advance, thereby predicting other components as well:

**Environment → Objectives → Strategy → Structure → System**


Based on certain objectives and strategy, it is possible to also establish a marketing programme based on a marketing mix.

For example, it is possible to observe an educational institution’s marketing mix through the following elements:

1. Generally, a product is presented by an educational institution’s educational, i.e., instructional process, which may be variously positioned on a sort of a life curve, depending on its contemporaneousness, i.e., adaptation to the modern trends of a concrete scientific and expert field here and abroad.

2. The product price is presented by the price a society pays to the educational institution as to enable its undisturbed functionality in line with its instructional process. As an educational institution is usually interested in more propulsive development than that allowed for by social circumstances, a part of the price of the educational process is deducted by the agency of special contractual relations with the individuals - beneficiaries of the educational process (e.g., studying for one’s own needs, part-time study in polytechnics and colleges, etc.), economic entities, or extension activities.

3. The distribution is presented by an educational institution’s spatial proximity with regard to the potential educational-process beneficiaries but also with regard to other congenial or unrelated “competitive” educational institutions. A distributional improvement is realized through the establishment of district branches, letter-exchange consultation, or the like, but simultaneously also by interventions in the network of educational institutions.

4. Promotion, with its publicity and PR activities, aiming to inform the potential beneficiaries and general audience of the specificities of the educational process in an educational institution.

Hereby, an educational institution product may be understood in two ways:

a) the product is presented by the departments/studies established in an educational institution in line with their curricula, personnel, premises and facilities used for this purpose;

b) the product is presented by the graduates and their proficiency level acquired throughout the study period and its applicability in economic and other practices.
We think that the first model of understanding the product is more logical for several reasons: firstly, a product has to be a result of the activity of a certain number of employees, in this case the trained staff, who are dedicated to be used by a certain number of “consumers.” Thereby, it has a certain price which is more or less directly paid by the “consumers” in order to use it. The “consumers” use these specific products “incorporating” them in themselves, adding to the labour-market value of a “product” of their own and satisfying their self-actualization needs. It is similar to the purchase of foodstuffs, whereby the consumers satisfy their basic needs and maintain their working capacities through their consumption, i.e., through physical “incorporation.” A “production” programme diversification in an educational institution implies either its deepening (opening of new departments/studies) or expansion (creation of new educational forms).

The student is not seen as a product as such because, technically, the student is not something that the college produces for direct exchange in the marketplace. However, there is a production function of academic institutions for, unlike most service industries, colleges evaluate the student-product and certify his/her characteristics in a similar way to which other industries certify the performance characteristics of their products. Belohav sees the relevance of two views. First, the traditional view that institutions provide a service with the student as the final consumer. Second, if the Government and business sectors are seen as the consumers, education is a value-added process and thus the institution can be considered as a manufacturing organization with the student being the final product (Belohav, 1984).

It is certain that the educational institutions, irrespective of their type but mainly those in higher education, may significantly increase their business transactions and thereby achieve their and the overall social objectives to an increased extent through the implementation of marketing.

4. INSTEAD OF A CONCLUSION

The catering trade is specific by virtue of the fact that it is a working-intensive activity, immediately implying that the participation of the human-factor is extremely important in a catering product’s formation. Moreover, in a catering product’s formation, the direct interactivity between catering-facility personnel and guests is equally important. That brings us to the conclusion that the personnel’s educational level significantly contributes to the quality of the aforementioned parameters.

Simultaneously, as a specific productional-servicing activity, the catering trade is subject to numerous technical-technological influences, but also to many fashion trends. For example, up to several years ago, the traditional French cuisine was a paragon in a cook’s education, being later modified to “nouvelle cuisine française,” but today there is a trend heading toward a return to the traditional dishes prepared from naturally grown ingredients (slow food vs. fast food). Additionally, fashionable trends are also present, e.g., macrobiotic nutrition, vegetarianism, etc. On the other hand, scientific realizations to the detriment of certain beverage types contribute almost to a renaissance in viniculture, its nurture, presentation, and consumption. The following remarks are just a delineation of how important it is for the educational system established for the catering and tourist trade to be transparent. The transparency of the system can be surely supported by additional educational forms that should be in the function of a permanent, and also specialist, education.
The strategic level of an educational institution as existing to create an internal environment that supports customer-consciousness and sales-mindedness among the personnel is achieved through supportive

- management methods;
- personnel policy;
- internal training policy;
- planning and control procedures (Robinson and Long, 1997).

The importance of permanent education (life-long learning) ensues from the easily provable assertion that personnel quality is a presupposition for the quality of catering services. Namely, a catering service may be terminologically determined as a complex of types, quantities, and qualities of everything that a guest – consumer - uses (enjoys) or consumes in the form of accommodation, foodstuffs, beverages, entertainment or recreation; moreover, a catering service is everything observed or sensed by the guest’s sense organs, physically and psychologically, which creates his (dis)pleasure or (dis)satisfaction. Although a catering service is essentially impalpable, it is functionally integrated in partial material products, being nonexistent independently. With regard to the fact that the catering personnel is the service deliverer, one may say that the personnel quality is a constituent part of service quality, most frequently even crucial for the service quality.

Through the educational process, human-factor development in the catering trade can be implemented in the following ways (Amoah and Baum, 1997):

- identification of manpower and training needs and development of national training structures and programmes;
- recruitment, training, and formal education of young school leavers preparing for careers in the industry;
- provision of on-the-job and specialist training services to the existing industry personnel and proprietors (and coordination of their certification);
- provision of advisory and business-development services to the industry;
- training for unemployed people to enhance their prospects of finding jobs in the hotel, catering, and tourism industry.

Personnel training in the catering trade might be defined as a systematic process whereby the human resources of a concrete catering entity acquire their knowledge and improve their skills by instruction and practical activities, resulting in the catering-entity’s behavioral improvement (Wilson et al., 1998). For example, the training contents may relate to the acquisition of additional sommelier knowledge, food hygiene, health conditions, workplace safety, and the like. Resistance to the training mainly emanates from the fact that the catering-entities’ managers themselves were not exposed to training or are unaware of its benefits. Moreover, the employees who are expected to be potential training beneficiaries frequently do not have time to attend. Finally, many catering entities do not have disposable assets to finance the training.

With regard to the unquestionable importance represented by the tourism industry in the Republic of Croatia’s economy, the raising of the quality level of a product of the tourist, and, independently, of the catering trade as its essential component, is imposed as a permanent need. Services represent a significant portion in the latter product, and thus the service-providing human factor becomes essential for the achievement of an appropriate quality level of an overall tourist product. Even an utterly superficial analysis demonstrates that numerous disharmonies exist between the quality of personnel and the needs of the Repub-
lic of Croatia’s catering and tourist trade. For the greatest part, the reasons for this dishar-
mony are the result of the inherited effects of numerous educational-system experiments,
but also of an inconsistent long-term educational policy, which is conditioned by numerous
reasons, but in any case also due to the fact that the visible implementation of a marketing-
based consideration of the overall problematic is absent.

A conclusion is self-imposed, and might read as follows: a priority task of all the inter-
ested parties is the improvement of an overall educational-system vertical as one of the
essential presuppositions for the improvement of the tourism development of the Republic
of Croatia.

The framework system-improvement tasks might be the following ones:
1. rationalization of an educational-institution network, which is a prerequisite for the
improvement of working conditions and for the quality upgrade of instruction;
2. curricular harmonization of all vertically connected educational institutions with the
actual demands of economic (catering- and tourism-related) practice (both technolo-
gical and organizational) and the assurance of appropriate textbook literature;
3. assurance of continued qualification of vocational instructors, as well as the devel-
opment of a clear-cut system relevant to the permanent specialist post-education of
the operational catering workforce;
4. utilization of legally-stipulated possibilities, e.g., rapid incipient work on the estab-
lishment of a gastronomic high-school type institution (one or more) as a logical ver-
tical for operational catering professions.

These generally enumerated tasks are feasible through more intensive communication
and co-operation in a triangle formed by the Croatian Ministry of Tourism, the Ministry of
Education and Sports, and the Hoteliers’ Association, i.e., by the individual departments
within these organizations. Only in this way can the realistic presuppositions for the overall
design and operationalization of high-quality catering products as important constituents of
the products of the Republic of Croatia’s tourist trade on the especially demanding tourist
market be created.

References

Amoah, V. A. and T. Baum, (1997), “Tourism Education: Policy Versus Practice,” In-
405-412.
Conway, T. et al., (1994) “Strategic Planning in Higher Education: Who Are the Cus-
Higher Educational Institutions Act, Official Gazette (Narodne novine), NN 96/93 and
59/96.
Kotler, Ph. and K. F. A. Fox, (1995), Strategic Marketing for Educational Institutions,
Kotler, Ph., and P. E. Murphy, (1982), “Strategic Planning for Higher Education,”
Journal of Higher Education, 52(Sept./Oct.)

291


What you should know about liberalization in tourism?

Mia Mikić*, University of Zagreb

Abstract

The General Agreement on Trade in Services (GATS) is the first multilateral agreement governing trade and investment in services. It became operational with the Uruguay Round Agreements and the establishment of the World Trade Organization (WTO) in 1995. GATS is widely regarded as the main instrument to facilitate further liberalization in services trade. In the tourism sector, GATS has served to create a legal framework for various services which have already been liberalized through unilateral reforms, particularly in the developing countries (such as foreign direct investment, commercial presence, movement of natural persons, etc.). This paper has a dual purpose. First, it reviews the GATS architecture to explain how does tourism fit within the framework. Second, the paper identifies the most common restrictions imposed on international tourism, and measurements useful in answering the question about “how protectionist tourism is?” The current status and agenda of negotiations are described. An appendix suggests a syllabus for a course on these issues.

Key words: services trade liberalization, GATS, tourism, cost of protection, presence of protection, development, training of tourism professionals

JEL classification: A2, F13

* Professor, Graduate School of Economics and Business, University of Zagreb, Trg J.F. Kennedy 6, 10000 Zagreb, Croatia, Phone 00385-1-2383137, Fax 00385-1-2335633, E-mail mmikic@elzg.hr.
1. Introduction

A person involved in tourism and liberalization of tourism should have a workable knowledge of at least the following:

a) What is liberalization?
b) What is the General Agreements on Trade in Services (GATS) and how does tourism fit into the GATS framework?
c) What are the typical barriers applied on tourism and what are their impacts?
d) How difficult and why it is to remove such barriers?
e) Are there any downsides of liberalizing tourism and what are they?

It is of course impossible to systematically and fully cover all of the above in a conference paper. Nonetheless, the paper provides a basic discussion on most of the above points. Furthermore, the appendix supplies a rich bibliography which allows an independent and fuller investigation by those who are interested in these matters.

Paper is organized in a following way. Next section sets a scene by giving a definition of liberalization and the need for a multilateral process of liberalization to include services. Section 3 explains the architecture of GATS and coverage of tourism sector. Section 4 identifies the major restrictions applying to tourism. It provides graphical tools for a simple “back-of-the envelope” analysis and some ideas on measuring of the economic impacts of these barriers. Instead of conclusion, section 5 briefly reviews what is going on in the current round of negotiation on tourism and other services. The appendix provides a syllabus with a reading list for a much needed training course on liberalization in tourism.

2. Background

It is important at the outset to clarify what we understand by the term “liberalization”. Liberalization in any trade model implies removal of a trade barrier, or any other intervention, so to restore the free trade prices. In practice liberalization takes many forms but rarely the move towards completely free trade. Thus one can speak of liberalization in terms of substituting the more efficient for less efficient form of intervention or in terms of neutrality of tradables’ prices. Another way to define liberalization is to say that it is any change in a policy that removes an anti-export bias of a trade regime and moves it towards neutrality. Yet another way is to see liberalization in a broader context of a domestic regulatory reform in addition to weakening of trade barriers. The view of liberalization based on substitution of measures is normally the view taken by all international economic organizations as they insist on a substitution of tariffs for quantitative restrictions in almost every case when prescribing liberalization. At least that was the case during the fifty years of liberalization in trade of industrial goods (manufactures) under the umbrella of the GATT Rounds.

The case for free trade is proven and accepted – by economists. To everyone else, particularly those who do matter in economic policy, free trade is still a dubious proposition. Nevertheless world trading community has recently celebrated fifty years of existence of increasingly liberal world trade. This achievement came because “countries have been persuaded to open their markets in return for comparable market-opening on the part of their trading partners. Never mind that the “concession” trade negotiators are so proud of wresting from other nations are almost always actions these nations should have taken in
their own interest anyway; *in practice countries seem willing to do themselves good only if other promise to do the same.*” (Krugman, 1997, p.113, emphasis MM). The main features of trading system evolved through these *tit-for-tat* policies were (Mattoo, 2000, p.4):

- reciprocity-based market access liberalization,
- efficient protection and regulation,
- credibility because of binding commitments, and
- non-discrimination through most-favoured-nation (MFN) clause.

Liberal trading system described above was achieved over a series of multilateral negotiating rounds and was contained almost fully to the industrial goods (through the General Agreement on Tariffs and Trade, GATT). Therefore when the last so-called Uruguay Round broadened the negotiating coverage to include *inter alia* services, it was a step that might have signaled the expansion of the support for free trade. But the conventional approach to liberalization, the one seen as the substitution of measures and which implies efficient protection, was not strictly applied to the area of services. On the contrary, most of the quotas imposed on services trade are still to be replaced by more efficient forms of protection such as fiscal instruments (cf. Mattoo, 2000; Deardorff, 2001). Furthermore, most commentators would agree that the system lack credibility, it is discriminatory and it is not fully reciprocal.

Trouble with including services into the multilateral trading system is that services *are* different from goods. They are “produced” differently, and they are traded (exchanged) differently. Services carry with them a complex system of protection, much less transparent than goods’ protection regime has ever been. Are liberalization effects different? If anything, given the nature of services, the net effects could be larger. Should it have a consequence on the policy prescriptions, including multilateral non-discriminatory trade? No. Nevertheless as we will show that the GATS departs from the GATT in a significant way. Does it matter? It does because it waters down the tightness of the rules-based trading system. On the other hand (there are no one-arm economists!), this doesn’t matter as even a weak multilateral agreement still counts as an improvement on what we used to have in the area of services before the Uruguay Round (that is, nothing). Furthermore, (cf. Deardorff, 2001) even weak GATS provides a platform for further negotiations as it helps in turning the current protection of services into a form that is more visible, better understood and more quantifiable and thus easier to negotiate about.

As for tourism sector of services, the things are even messier. They are messier both because tourism compared to services in general is equally if not more difficult to define and measure. Tourism is not just another service. Increasingly it is seen as a *cluster* including those “services which are characteristic and connected to tourism, both forming part of services conventionally denominated as specific to tourism, as well as services non-specific to tourism” (WTO, 1999, p.4). This definition reflects the specific and heterogeneous nature of tourism. At present however a definition much more limited in scope is used encompassing only category 9 of the Services Sectoral Classification List known as Tourism and Travel Related Services.

### 3. GATS Architecture and Tourism

As said above, the GATS is the first multilateral framework of rules and principles for liberalizing and organizing trade in services. Similar to GATT, the GATS is a government-to-government agreement. However the framework is of direct relevance to business as the
rules laid down are applicable to operation of firms in services sectors of all member countries. The Agreement covers services defined as “any service in any sector” including investment (except services supplied in the exercise of government authority). Services are grouped in 12 sectors:

- Business (including professional and computer) services
- Communication services
- Construction and engineering services
- Distribution services
- Educational services
- Environmental services
- Financial (insurance and banking) services
- Health services
- Tourism and travel services
- Recreational, cultural and sporting services
- Transport services
- Other services not elsewhere included.

The concept of “international trade” is for many of the above services different from international trade in goods. It requires physical proximity between the provider (supplier) and the user (consumer) of a service. Although such proximity is not necessary for some services (number of which grows by the day with the advances of electronic means of delivery), there are still many services that depend on supplier and consumer being in one location. In fact these services that require proximity create a special type of services. They are inextricably linked to factor movement across national boundaries (capital or labour movement or both). This in turn has implications for their liberalization as we will demonstrate in the next section. The GATS takes care of the special character of trade in services by defining so-called "modes of supply" (Article I). There are four different modes:

a) Cross border supply – a non-resident service supplier supplying services across borders in a member’s territory (e.g. software services)

b) Consumption abroad – the freedom for a member’s residents to purchase services in the territory of another member (e.g. consumer moves to consume tourism or education services or a ship being repaired abroad)

c) Commercial presence – the opportunity for foreign service suppliers to establish and expand a commercial presence in a member’s territory (e.g. insurance company or a bank owned by non-residents establishing a local branch)

d) Presence of natural persons – entry and temporary stay in a member’s territory of foreign individuals in order to supply a service (e.g. a doctor, fashion model or a consultant supplying a service through their physical presence in another country or the foreign employees of a foreign insurance company).

Category of services that can be delivered over national borders is sometimes called “separated” services. In terms of trade in effect crossing the border, these services are the closest to trade in goods. Other three categories of services are thus “non-separated” services and they normally require proximity of consumer and producer and/or foreign direct investment (FDI). It is then obvious that any measures that are designed to take effect at the border would have little impact on the biggest part of traded services, which were more under effect of domestic regulation and local market structure. This had very important bearing on nature of the GATS.
The Agreement has a similar structure to the GATT, comprising three parts: 1) the main text which lays down the general rules and disciplines that apply to measures affecting trade in services, 2) the part containing the individual schedules of commitments for each WTO member which specify on a sector-by-sector basis the conditions under which foreigners may supply services, and 3) the part with annexes addressing special considerations relating to some service sectors (see Figure 1).

The most important principles of the GATS are the following:

1. There should be no discrimination between member countries of the Agreement (*Most-Favoured-Nation or MFN treatment*, Article II). This is the core principle of GATT and it applies universally. In services this obligation means that a member cannot discriminate among foreign service providers by offering more favourable treatment to providers of any one country. However, it may be possible for a country to maintain measures not fully consistent with the MFN treatment for a transition period of up to 10 years (expiring in 2005) provided that all exceptions are clearly stated in the member’s MFN exemptions list. The reasons behind allowing MFN exemptions are primarily of political economy nature. Namely, when GATS was negotiated about, a number of countries already had preferential agreements in services that they had signed with trading partners, either bilaterally or regionally / in small groups. WTO members felt it was necessary to maintain these preferences but to protect the MFN principle they agreed on strict rules for the use of exemptions. The exemption lists are also part of the GATS agreement.

2. There should be no discrimination in favour of national service providers by the virtue of *national treatment* (Article XVII). Any measure clearly violating the national treatment (i.e. treating domestic service or provider more favourably than the like foreign provider) must be listed in the member’s schedule of commitments which lists sectors and conditions under which the national treatment would be extended. This contrasts with the way the national treatment principle is applied for goods - in that case, once a product has crossed a border and been cleared by customs it has to be given national treatment even if the importing country has not made any commitment under the WTO to bind the tariff rate.

3. Members are not meant to use measures which are defined as restricting *market access*. Examples of such measures include quotas, economic needs tests, requirements for certain types of legal entities, and maximum foreign shareholding limits. Measures which are deemed to violate market access obligation but which a country perceives desirable to retain to some degree, must be clearly inscribed in the schedule of commitments (Article XVI).

4. Countries’ *domestic regulations* are meant to be administered in a reasonable, objective and impartial manner (Article VI). Regulation such as qualifications and licensing requirements and technical standards must be based on objective and transparent criteria and not unnecessarily burdensome to serve as a protectionist measure.

5. Governments must publish all relevant laws and regulations pertaining to the GATS. To guarantee *transparency* of their policies, governments committed to setting up inquiry points within their bureaucracies (Article III). Foreign companies and governments can then use these inquiry points to obtain information about regulations in any service sector. Furthermore, governments must notify the WTO of any changes in regulations that apply to the services that come under specific commitments.
Obviously, the GATS made a number of departures from the “one size fits all” approach followed in the GATT. Some commentators argue that this makes GATS more in synch with the needs of developing and the least developed countries. The features of the GATS that are seen as developmental-friendly are: bottom-up approach to the scheduling of sectors, the notion of progressive liberalization (Articles XIX-XXI), the unfettered right to regulate by allowing members to change existing regulations and introduce new ones, appropriate flexibility for making commitments and the notion that market access and national treatment obligations are not general but negotiated obligations (Zutchi, 2001, p.100). On the other hand, all these features also make GATS a weaker instrument of liberalization as we will discuss in the next section.

There is a plenty of evidence that tourism is one of the world’s largest and fastest growing industries. It accounts for over one-third of the value of total international services trade in 1997 and together with travel industry provides one in ten jobs world-wide. Tourism is the only sector in which developing countries consistently run trade surpluses, it ranks in the top five export categories for 83% of all countries, and is the leading source of foreign exchange in at least one in three developing countries. Irrespective of being so relevant for national economies, tourism did not feature high during the GATS negotiations. This is probably “because tourism services include, have an impact on, or are impacted by aspects of other services sectors so that defining this sector for the purposes of an international trade agreement is one of its greatest challenges” (Industry Canada, 2000, p.14). Tourism in the context of GATS has been identified as a sector called “Tourism and Travel-related Services (TTRS)”. It contains four sub-sectors:

A. Hotels and restaurants (including catering),
B. Travel agencies and tour operators services,
C. Tourist guides services, and
D. Other (unspecified).

The above definition of tourism leaves out many services which are regarded of great relevance for tourism. They are known as key tourism-related activities and include: computer reservations systems, transport and car rentals, many business services, distributional services, etc. The expansion of the definition of tourism to include such other services is the cornerstone of the proposed Annex on Tourism in the GATS 2000 Negotiation. This proposal requests a change in a definition of tourism for the purposes of negotiation so that tourism will be perceived as a tourism cluster including tourism characteristic services and tourism connected services.

The core provisions of the GATS that have a bearing on the tourism sector are transparency (being able to find out what the rules are), and greater stability and predictability promoting domestic and foreign direct investment.

As in the case of services in general, with tourism too we have two-level commitments: horizontal and tourism-sector specific commitments. The horizontal commitments, which as their name indicates apply across all the sectors contain broader measures with an effect on commercial presence and investment, real estate transactions, government subsidies and taxation and temporary movement of natural persons. By September 1998 total of 112 countries provided schedules specific to tourism sector under the GATS (see Table 1). This makes tourism the most liberalized sector of all. However, this liberal approach to tourism in general obscures a great variability of openness across different sub-sector and modes of supply (Table 2 shows details). While hotel and restaurants sub-sector shows the
greatest openness (112 countries making commitments), sub-sector covering travel agencies and tour operators contain 89 commitments, sub-sector of tourist guide services 54 commitments and sub-sector of other services only 13 commitments.

Looking at MFN exemptions affecting Tourism sector directly only Mexico has taken one. However many countries have taken a number of MFN exemptions in tourism-related services such as transport and in particular under the mode of movement of natural persons.

The above commitments represent the starting point for the GATS 2000 negotiations. In March 2001 the Services Council in the WTO agreed on the negotiating guidelines and procedures which opened the way from rule-making phase of the negotiations into the market-access phase of negotiations (WTO, 2001). Liberalization shall be advanced through bilateral, plurilateral or multilateral negotiations with the main method of negotiations remaining to be the request-offer approach. We will return to the issue of this method of liberalization in the final section after discussing the major restrictions imposed on tourism transactions.

4. Most important barriers to tourism and the impacts of their removal

Any policy, which impedes service producer and consumer interacting via any of the four modes of supply, is considered a barrier to international service trade. OECD (2000) published an “inventory” of barriers applicable to the tourism sector as defined in the GATS but the report also includes restrictions concerning some tourism-related services, which currently are not under tourism sector (such as aviation services). The report emphasizes that assessing the actual impact of barriers in the area of tourism is difficult. Nevertheless it states that the tourism sector is relatively liberal overall (p. 4). Figure 2 provides a snapshot of the limitations to GATS commitments in tourism sector.

The analysis of the impact of restrictions in tourism is best served by grouping them into two distinctive categories (cf. Industry Canada, 2000, pp. 16-27):
1. Barriers that affect operations of individual travelers
2. Barriers that affect operation of tourist-related business.

Let us take each one in turn.

4.1. Barriers impacting individual travelers

This category of barriers comprise visa requirements, limitations on travel abroad, restrictions on foreign exchange, conditions and procedures surrounding issuance of travel documents, customs controls, customs exemptions available to returning residents, entry/exit taxes, departure taxes, health controls, consumer protection measures, and some regulation in aviation and related to infrastructure.

Until most recently (i.e. September 11) hardly any country was using the barriers to entry of foreign tourists. While situation is slightly different now, in principle all countries remain very interested in the income from tourism. Bureaucratic entry formalities or excessive visa fees, airport departure taxes or government-imposed surcharges on hotel bills for foreign tourists, primarily damage the country’s own tourism industry, and scarcely ever represent serious trade barriers for other countries. That is why most of this category of barriers are not sustainable and do not present themselves as a great threat to further liberalization.
4.2. Barriers impacting tourist-related business

According to Industry Canada (2000, p. 17) the most important restrictions in this group are requirements for licences and approvals, import policies, foreign investments, property investments, taxes and charges, foreign exchange controls, regulations related to the repatriation of profits or capital, economic needs tests, employment issues such as control over the hiring of non-nationals, aviation and infrastructure-related measures and access to and affordability of technology and information systems. Most of these barriers qualify as non-tariff barriers to trade.

Despite the claims that tourism as a sector is liberal (or much more open than other services) it is important to be able to estimate the economic and social costs of the measures that are imposed or potentially could be imposed to restrict tourism. What follows is the simplest possible approach in analyzing the effect of non-tariff barriers to trade. Thus Figure 3 represents a partial equilibrium analysis of an imposition of a non-tariff barrier in one of the tourism sub-sectors, say tourist guiding. Import demand for say guiding of excursions in the absence of any restrictions in given by the downward sloping demand curve, D. Import is typically an imperfect substitute for a domestic service and the position of demand D depends on the price of domestic substitute. In terms of logarithms, demand D is quantity demanded as a function of domestic price paid for a unit of imported guiding service in the absence of restrictions (note that the impact of exchange rate changes is ignored here).

Let the free-trade equilibrium be represented by the point A with price \( p_0 \) and quantity \( Q_0 \) assuming a competitive supply of foreign guiding services, S. Suppose now an introduction of a compulsory history and language tests for all foreign guides which increases the cost of each unit of service imported. This can be reflected as a shift in a demand curve downward and its slope becoming steeper (that is demand becoming less price elastic). This new demand curve is \( D' \) and it indicates prices net of the cost of tests. To find domestic price of a service however we must use the original demand curve. Thus the equilibrium is now at point B with price much higher (\( p_1' \)) and quantity reduced to \( Q_1 \).

But what we should be really interested in is the welfare effect of this non-tariff barrier as well as in the measure of the barrier itself. Both are more complicated in the case on non-tariff barriers on services than when we deal with simple tariffs on goods. As indicated in the Introduction to this paper, we are not able to explain here how an estimation of the size of barriers and their welfare effects could be done. Instead we recommend Deardorff and Stern (1985) and OECD (1997) as first point of reference for more detailed analysis. It suﬃces to say here that in most cases an imposition of a barrier to free imports would increase the price of both imported and domestic service (and good) which will have direct welfare effects on consumers of the service and on the domestic providers. Contrary to the case with tariffs, it is very hard for a government to capture any revenue with these barriers so that the net costs for the society as a whole rise compared to the case with tariffs. Furthermore there are often very high costs involved with administering the barrier adding to the overall resource costs of protection. These costs should also include rent-seeking and similar costs.

It is true that many of the barriers or restrictions applying to tourism tend to be by-products of general economic, political and social concerns applying to numerous sectors. Similarly some of the policies with the most serious impact on tourism often have developed without a direct input from a tourism sector. This happens because tourism is one of the sectors with a very pronounced vertical nature in regard to marketing and policy development.
4.3. Measuring the presence of barriers in tourism

The analysis above was leading towards answering the question “how costly is it to have barriers in tourism?” and here we would like to discuss how to answer a different question which is “how protectionist tourism is?”. Compared to answering this question in case of tariffs and goods trade, where we could check a country’s customs schedule and calculate effective rate of protection, here such calculation cannot be performed. Instead there are alternative measures of the presence of protectionist measures. The most common are (Stern, 2001):

1. **Frequency-type measures** which are based on the inventory listings of observed non-tariff barriers.
2. **Price-comparison measures** which give tariff-equivalents.
3. **Quantity-impact measures** based on econometric estimates of trade flows.
4. **Equivalent nominal rates of assistance** estimating assistance based on various policies given to a particular sector or activity.

To the best of our knowledge, not many studies were done on measuring extent of protection in tourism apart from frequency based measures (which leaves the door open for many theses to be written on this particular topic!). Therefore our question about how protectionist tourism really is will remain unanswered in his paper.

5. Concerns and issues in the current round

The GATS commits members’ governments to undertaking negotiations on specific issues and to enter into successive rounds of negotiations to progressively liberalize trade in services. The first round had to start no later than five years from 1995. Accordingly, the services negotiations started officially in early 2000 under the Council for Trade in Services. In March 2001, the Services Council fulfilled a key element in the negotiating mandate by establishing the negotiating guidelines and procedures. In addition, the Doha Declaration in November 2001 endorsed the work of the last two years of negotiations, reaffirmed the negotiating guidelines and procedures, and established some key elements of the timetable including, most importantly, the deadline for the conclusion of the negotiations as part of a single undertaking.

The current negotiations are focused on two large areas: rules-making and technical cooperation and capacity building. The work in the former area should lead to a more complete and improved framework for trade in services in general. It is complicated by the fact that there are still many questions related to the nature or services and their linkage with the rest of national economies that are not fully answered. For example negotiations on emergency safeguard measures as well as on subsidies are stalled because of difficulties with a definition of domestic service providers. Capacity building is a response to a shortage of financial and human resources in many countries members of the WTO preventing them to effectively participate in the negotiations. Furthermore it is linked to the realization that such shortage of resources prevents those same countries to use liberalization as engine of growth.

Given the structure of the Agreement, the overall progress in liberalization will depend on the level of removal of barriers in both the part of horizontal commitments and the part on specific limitations. The most restricted areas within the horizontal commitments refers
to the mode 4, that is, movement of natural persons. Barriers such as economic needs test, nationality and/or residency requirements, complex procedures for work and residence visas for foreign nationals are prevalent in most countries. There are also some barriers in mode 3, that is, establishment of commercial presence especially in developed countries. Tour operators, travel agencies, restaurants and hotels still have to go through cumbersome restrictions to establish commercial presence in the market of developed countries and even then it is limited in terms of horizontal and vertical integration.

Notwithstanding that, the most important proposal of the current round referring to tourism is to negotiate tourism as a cluster adding an annex on tourism to the GATS. This annex would propose a set of rules with the goal to ensure fair trading conditions in tourism. In addition, these rules would be consistent with the idea of a viable tourism (that is, economically, socially, culturally and environmentally sustainable tourism).

References

### Figure 1 – Components of GATS

<table>
<thead>
<tr>
<th>Framework of Rules</th>
<th>National Schedules of Commitments</th>
<th>Annexes and Ministerial Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains general obligations conducive to international trade in services, including:</td>
<td>Submitted by each of the WTO signatory countries. The schedules contain commitments regarding restrictions and limitations to market access and national treatment. Schedules typically comprise:</td>
<td>Provide information regarding ongoing negotiations and rights to temporary MFN exemptions, including:</td>
</tr>
<tr>
<td>* Most-Favoured-Nation treatment</td>
<td>* Horizontal commitments</td>
<td>* Annex on MFN exemptions</td>
</tr>
<tr>
<td>* Transparency</td>
<td>* Industry-specific commitments with respect to 4 modes of supply:</td>
<td>* Annex on movement of natural persons supplying services under the Agreement</td>
</tr>
<tr>
<td>* Increased participation of developing countries</td>
<td>* cross-border supply</td>
<td>* Annex on air transport services</td>
</tr>
<tr>
<td>* Economic integration</td>
<td>* consumption abroad</td>
<td>* Annex on financial services</td>
</tr>
<tr>
<td>* Domestic regulation</td>
<td>* commercial presence</td>
<td>* Second annex on financial services</td>
</tr>
<tr>
<td>* Monopolies and exclusive service suppliers</td>
<td>* presence of natural persons</td>
<td>* Annex on negotiations on maritime transport services</td>
</tr>
<tr>
<td>* Business practices</td>
<td>* MFN exemptions (optional)</td>
<td>* Annex on telecommunications</td>
</tr>
<tr>
<td>* Emergency safeguard measures</td>
<td></td>
<td>* Annex on negotiations on basic telecommunications</td>
</tr>
<tr>
<td>* Payments and transfers</td>
<td></td>
<td>* Decision on Institutional Arrangements for the GATS</td>
</tr>
<tr>
<td>* Restrictions to safeguard the balance of payments</td>
<td></td>
<td>* Decision on Certain Dispute Settlement Procedures for the GATS</td>
</tr>
<tr>
<td>* Government procurement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* General exceptions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Subsidies</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: WTO (1998)
### Table 1 – Tourism and Travel-related services: Number of Countries by Mode of Supply

<table>
<thead>
<tr>
<th>Mode of Supply</th>
<th>Market Access</th>
<th>National treatment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full</td>
<td>Part</td>
</tr>
<tr>
<td>Cross-border supply</td>
<td>33</td>
<td>49</td>
</tr>
<tr>
<td></td>
<td>29%</td>
<td>44%</td>
</tr>
<tr>
<td>Consumption abroad</td>
<td>55</td>
<td>47</td>
</tr>
<tr>
<td></td>
<td>49%</td>
<td>42%</td>
</tr>
<tr>
<td>Commercial presence</td>
<td>25</td>
<td>86</td>
</tr>
<tr>
<td></td>
<td>22%</td>
<td>77%</td>
</tr>
<tr>
<td>Presence of natural persons</td>
<td>1</td>
<td>105</td>
</tr>
<tr>
<td></td>
<td>1%</td>
<td>94%</td>
</tr>
</tbody>
</table>

Source: Industry Canada (2000, p.22)

### Table 2 – Commitments by individual sub-sectors (% by sector and mode of supply)

<table>
<thead>
<tr>
<th>Market Access</th>
<th>Cross-border</th>
<th>Consumption abroad</th>
<th>Commercial presence</th>
<th>Natural persons</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full</td>
<td>Part</td>
<td>No</td>
<td>Full</td>
</tr>
<tr>
<td>Hotels and restaurants</td>
<td>31</td>
<td>23</td>
<td>46</td>
<td>54</td>
</tr>
<tr>
<td></td>
<td>3%</td>
<td>91%</td>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>Travel agencies and tour operators</td>
<td>49</td>
<td>19</td>
<td>31</td>
<td>65</td>
</tr>
<tr>
<td></td>
<td>1%</td>
<td>88%</td>
<td>11</td>
<td>1%</td>
</tr>
<tr>
<td>Tourist guides</td>
<td>56</td>
<td>7</td>
<td>37</td>
<td>78</td>
</tr>
<tr>
<td></td>
<td>0%</td>
<td>85%</td>
<td>15</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>38</td>
<td>31</td>
<td>31</td>
<td>38</td>
</tr>
<tr>
<td></td>
<td>0%</td>
<td>92%</td>
<td>8</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>National treatment</th>
<th>Cross-border</th>
<th>Consumption abroad</th>
<th>Commercial presence</th>
<th>Natural persons</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full</td>
<td>Part</td>
<td>No</td>
<td>Full</td>
</tr>
<tr>
<td>Hotels and restaurants</td>
<td>37</td>
<td>21</td>
<td>42</td>
<td>58</td>
</tr>
<tr>
<td></td>
<td>11%</td>
<td>79%</td>
<td>10</td>
<td>11%</td>
</tr>
<tr>
<td>Travel agencies and tour operators</td>
<td>55</td>
<td>15</td>
<td>30</td>
<td>70</td>
</tr>
<tr>
<td></td>
<td>17%</td>
<td>69%</td>
<td>15</td>
<td>17%</td>
</tr>
<tr>
<td>Tourist guides</td>
<td>59</td>
<td>4</td>
<td>37</td>
<td>85</td>
</tr>
<tr>
<td></td>
<td>13%</td>
<td>67%</td>
<td>20</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>54</td>
<td>23</td>
<td>23</td>
<td>62</td>
</tr>
<tr>
<td></td>
<td>23%</td>
<td>69%</td>
<td>8</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: Industry Canada (2000, p.23)
Figure 2 – Tourism Services – Limitations to GATS Commitments

Source: Industry Canada (2000, p. 48)
Figure 3 – The price and quantity effects of a non-tariff barrier
Appendix: Syllabus for the course

Title: Liberalization in International Tourism

Purpose: This programme introduces the basics of the economic analysis necessary for understanding trade liberalization in tourism. It centers on the claim that the economic case for liberalization of tourism is no different from that for the liberalization of trade in goods. Furthermore with services there are potentially more benefits from liberalization as it gives rise to scale effects not always present in goods trade. The concepts and arguments are explained in non-technical terms and are illustrated by examples whenever possible. A condensed review of the multilateral trading system and its relevance for tourism is provided together with an up-to-date report on the current negotiation round.

Content:
1. Introduction – stylized facts about tourism in production, employment, trade and investment
2. Is trade in services different from trade in goods and how?
   a. Definition of services
   b. Modes of delivery
      i. Trade in services and movements of factors
   c. Scope of the GATS
3. The basics of trade intervention
   a. What is trade intervention
   b. Typical instruments
      i. Price-based instruments
      ii. Quantitative instruments
   c. Internal policies
   d. Domestic regulation
      i. Monopolies
      ii. Asymmetric information
      iii. Universal services
4. Measuring the extent and costs of intervention
5. Diplomacy in negotiation
Selected Readings

Books, monographs and book chapters:


Journal articles and other papers:


UNCTAD (1998) “Report of the expert meeting on strengthening the capacity for expanding the tourism sector in developing countries”, TD/B/COM.1/EM.6/3 7 July (Geneva: UNCTAD)


Some useful Internet resources:
http://gats-info.eu.int
http://www.wto.org
http://services2000.ic.gc.ca
http://www.unucc.org/unctad/
http://www.oecd.org/
http://www.ictsd.org
http://www.worldbank.org
http://www.world-tourism.org
Using the Internet for complementing and enhancing the teaching of tourism and hospitality education: evidence from Europe

Marianna Sigala*, Scottish Hotel School, University of Strathclyde, United Kingdom
Evangelos Christou, Higher Technological Educational Institute of Thessaloniki, Greece

Abstract

The purpose of this study was to investigate current levels of use and factors affecting application of Internet tools, i.e. the World Wide Web and electronic discussion groups, for enhancing and complementing traditional modes of teaching tourism and hospitality courses. 81 educators from all over the world were surveyed for exploring whether and how they use the Internet in instructing their courses. The majority of the educators teaching hospitality and tourism management courses use the Internet in their instruction, but at different levels and approaches; research findings revealed that Internet tools and capabilities are very limited used for educational purposes. Educators treated Internet as a simple information sharing and search medium, while the perceived Internet usefulness and easy of use had a significant effect on reported patterns of Internet’s educational implementation. The most reported applications of the Internet were: searching the Internet for information/data, gathering data about a specific company, retrieving an article, reading or downloading homework problems, downloading real-life case studies and downloading a syllabus. The most common reasons for not using the Internet in teaching were: lack of student access to computer laboratory resources, lack of faculty training in Internet-related areas, lack of relevant Websites, and faculty not being convinced about the learning benefits students receive from Internet use. It is concluded that, to encourage tourism educators to further increase their type and levels of use of Internet’s tools in their pedagogical modes, institutions should overcome obstacles regarding educators’ awareness of technological capabilities, technological competencies and support.

Keywords: tourism; hospitality; education; Internet; adoption; applications.

* Corresponding author:
Marianna Sigala, Scottish Hotel School, University of Strathclyde, 94 Cathedral Street, Glasgow, G4 0LG, United Kingdom. Tel.: +44-141-548-3949. Fax: +44-141-552-2870. E-mail: m.sigala@strath.ac.uk
Introduction

The use of computers has grown rapidly in education as well as in business. The computer has been viewed as an effective and efficient instructional tool to deliver information that is geared toward a specific learning goal. Computers, with the application of software programs, have become a popular educational tool to assist educators to stay abreast with rapidly and constantly changing information, students’ growing expectations (Kupsh & Rhodes, 1987), as well as enhance learning and teaching process (Law, 1997).

Since its introduction, the Internet has impacted the educational model in a fundamental way. The application of Internet tools and capabilities provide tremendous possibilities for enhancing and complementing the delivery of education in traditional classrooms. Internet has been developed into a valuable source for searching, interacting with and disseminating learning material; it is also used as an educational delivery platform that enables the development of interactive and collaborative learning (Paulisse and Polik, 1999). Course web pages, discussion groups, bulletin boards and the online education model have impacted the teaching process in significant ways, across all disciplines and at all levels (McConnell et al., 1996; Veldenz and Dennis, 1998). Despite Internet’s benefits for the delivery of tourism and hospitality education are also increasingly being recognised (Christou and Sigala, 2000; Cho and Schmelzer, 2000), there is limited knowledge regarding how the Internet has been implemented for the delivery of tourism and hospitality education in traditional classrooms.

The Internet has become the largest global communication network providing access to people, but also to data, software, documents, graphics, and audio and video clips. So, it is imperative that tourism and hospitality students, soon to enter the global marketplace, are exposed to the online information resources and the managerial and technological uses of the Internet in relation to the new paradigm of e-business (Cho and Schmelzer, 2000). However, texts, cases, homework assignments, articles, innovative instructional formats etc., utilizing these information resources in an appropriate pedagogical context for tourism and hospitality courses, are still emerging. Also, information sharing concerning actual educational benefits and drawbacks appears sparse.

This paper aimed at investigating the level and type of use of Internet tools (i.e. the WWW and the electronic discussion tools like e-mail and online forums) for the delivery of tourism and hospitality education, as well as at examining factors that could have determined the former. The paper also examined the factors determining the adoption and level of use of Internet tools, in order to benefit from current experiences in Internet implementation in classroom and provide constructive recommendations for future practices.

Theoretical Background

Applications and benefits of Internet in education

A large number of researchers and educators have surveyed issues related to the use of computers in tourism and hospitality education. Lambert and Lambert (1988) examined the usage of microcomputer-based simulation to assist students in improving decision-making skills. Buergemeister (1989) investigated the utilisation of computers as a teaching tool in undergraduate programs in hospitality management, while Jaffe’s (1989) study provided evidence of the effectiveness of computer-assisted instruction. In investigating the impact
of multimedia for teaching tourism and hospitality students, Sigala and Christou (2001) also provided positive evidence of the efficiency and effectiveness of multimedia based instruction.

Moreover, the Internet and computer technologies are capable of stimulating, engaging and motivating any learner, but they also offer greater learner participation by enabling educators to tailor educational material and content to individual variances such as location, timing and people (Law, 1997). Tourism and hospitality education based on Internet and distributed multimedia technologies overcome geographic and time barriers, strained budgets and overlapping schedule conflicts. Learners can progress at their own pace and comfort level while courses can be taken from any location and at any user defined time with consistency of instruction, content and delivery methodology. What is more, the use of Internet in tourism and hospitality instruction may incorporate modules and courses that allow educators to control and monitor both the learners and their progress. By monitoring and analysing users’ progress and use of educational material, tourism and hospitality educators can provide customised advice and attention to individual learners separately, while e-learning developers gain valuable feedback for further changing and developing their interactive educational material.

Flynn (1992) explored how instructors can use the Internet as an electronic depository and mechanism for providing and acquiring continuous feedback to and from students. They regarded such application as an essential tool for the continuous improvement of the teaching process. Hedtke (1997) argued that the Internet is expected to considerably improve the quality, availability and relevance of information for preparation of lecturers. However, Hedtke et al. (2001) research findings revealed that frustrating experiences during online search for teaching material, caused either by lack of or difficulty in tracing material, were a major factor inhibiting the use of the Internet for preparing lessons.

According to Pedro (2001) the application of Internet tools has fostered two changes in the organisation of teaching: a) the use of electronic mail and more generally of communication tools (chats, forums, bulletin boards, etc.); and b) the publication and search of teaching material in digital form. Electronic discussion groups and “chat rooms” can extend the reach of the classroom beyond the physical campus. Research suggests that online collaborative learning platforms supporting electronic discussions offer a powerful environment for learning, as it enables members to reflect on each other’s experiences and to engage in collaborative tasks (Sigala, 2001a). In such groups, it is very likely for students to grow a high sense of presence and a growing sense of community.

Aims of tourism and hospitality education and the Internet

The mission of tourism and hospitality management programs is to prepare students for careers in the tourism and hospitality sectors and to produce industry leaders who are exceptionally motivated, service-oriented and quick thinking (Pavesic, 1993; Christou, 1999; LeBruto and Murray, 1994). However, as a result of the diverse nature of the industry, it is not easy to precisely define what skills and knowledge tourism or hospitality graduates may need to develop during their studies; it is generally agreed that graduates should have a multi-skills base which allows them to be creative, flexible and adaptable (Baum, 1990). The development of students’ interpersonal skills is considered as a vital issue according to hospitality industry’s views (Martin and Cumming, 1994; Christou and Eaton, 2000).

Mann (1993) discussed the future of tourism and hospitality classroom in the year 2005 proposing that in the standard classroom, all students will have access to computer moni-
tors; students will learn via computer and have access to information related to the subject matter, while instructors will serve as facilitators to guide additional interpretation of material and assist students in the learning process. McDonnell (2000) advocated and explored the use of online discussions for tourism and hospitality education by analysing the advantages of asynchronous communication as a form of tutorial in teaching tourism and leisure management.

Moreover, the importance of experiential learning or training experiences in the actual environment for hospitality management programs tourism is increasingly being recognised. Indeed, tourism and hospitality graduates are expected to master technical skills and competencies before entering entry-level positions. Consequently, students need to have a first hand experience and knowledge of the real work environment. Internet education is being gradually implemented in tourism and hospitality education because it familiarise students with technological applications as well as provides them the opportunity to excel in technical skills and competencies that are nowadays sought in the tourism and hospitality industry (Sigala, 2001b). It is also expected that technologies such as VRML and Java would soon enable the incorporation of interactive virtual tours of tourism and hospitality enterprises in educational software.

It is also established that the acquisition of knowledge and the development of students’ soft skills (such as communication and social skills) can be assisted greatly by the use of computers and virtual networks (Sigala, 2001b). Other benefits of using the Internet and multimedia based instruction rather than traditional classroom instruction in tourism and hospitality education include: enhanced lectures, increased efficiency, increased learner interest, greater student involvement, higher retention, reduced overall training costs and reduced teaching time (Anyawu, 1996; Kasavana, 1999; Cho and Schmelzer, 2000).

**Internet-based educational resources**

The variety of Internet-based educational resources for tourism and hospitality studies is being expanded over the last two years. A number of textbooks focusing on different issues of tourism and hospitality now have their own homepages on the Internet with exercises, assignments, readings, and links for further resources available for student retrieval (like www.myphilip.com by Pearson Education Publishing and www.pageout.net from McGraw-Hill). The authors and publishers list several Internet mailing lists and numerous homepage addresses pertinent to tourism and hospitality managers. In addition, the authors provide their own Internet homepage to book adopters; through this medium, they can answer questions, share teaching insights and information, and distribute new pedagogical insights as they unfold with suggestions on their pedagogical uses. Some Internet sites like these make available an homepage and Websites containing exercises, virtual tours, chapter lectures, interactive chapter quizzes, sample student projects, course outlines, lecture slides, and other materials not included in the text.

In addition to textbooks’ homepages, educators can also use Websites of professional and academic tourism and hospitality organisations (like, for example, the European Association for Tourism & Leisure Education, the Hotel & Catering International Management Association, the European Council on Hotel, Restaurant & Institutional Education, the World Tourism Organisation, the Tourism Information Network and the LTSN Centre for Tourism, Hospitality, Sport & Leisure Resources). Some of these Websites contain real-life case studies, spreadsheet files, test questions, interactive simulations, quizzes, and tourism
and hospitality companies’ virtual tours. Thus, Web users can instantaneously access these sites with no additional effort.

While these articles, books, and computerized resources represent an excellent foundation, there exists much room for added contributions, which more efficiently connect the information superhighway, its resources and tools for more effective and relevant instruction and appreciation for tourism and hospitality courses. In particular, a full exploitation of Internet tools and capabilities entails the use of not only its automational and informational aspects. Innovative uses of Internet can foster and enable a total transformation of the educational experience. In this vein, Harasim (1996) advocated that Internet is advancing a new paradigm of learning, entailing new modes of educational delivery, learning domains, learning processes and outcomes, as well as new educational roles and entities. Sigala (2001b) also argued that the Internet fosters re-engineering and re-structuring of the whole education process by significantly changing the definition, design and delivery of tourism and hospitality education. Thus, this study investigated how Internet tools (i.e. the WWW and electronic discussion groups) are being used for enhancing and complementing the learning material, the educational delivery processes and its outcomes. Moreover, the effect of particular factors on Internet tools’ adoption and usage patterns are also being examined in order to provide suggestions for successful implementation of Internet based instruction.

Factors affecting Internet tools adoption and use

There has been considerable research on the factors that predict whether individuals will accept and voluntarily use information technology (IT). One of the most recognised and established research efforts on factors determining IT adoption and use was made by Davis (1989) in a study of the influence of perceived usefulness and perceived easy of use on actual system usage. Davis (1989) developed a measurement instrument for assessing user acceptance of IT called the Technology Acceptance Model (TAM). Perceived easy of use was defined as “the degree to which the ... user expects the target system to be free of effort”, while perceived usefulness is the user’s “subjective probability that using a specific application system will increase his/her job performance within an organisational context”, (Davis et al, 1989, p. 985). Perceived usefulness is influenced by perceived easy of use (e.g. Hendrickson and Collins, 1996), while both constructs affect level of IT use.

TAM has many strengths, including its specific focus on IT use, its base in a theory of social psychology, the validity and reliability of its instruments and its parsimony (Mathieson et al, 2001). The model also performs well empirically. By using regression analysis Davis (1989) and Davis et al (1989) were able to determine the relationships in the TAM and predict system usage. Several other studies provide positive support for a full causal model (e.g. Adams et al, 1992; Hendrickson and Collins, 1996; Igbaria et al., 1997).

However, TAM’s limitation is that it assumes usage is volitional, meaning that there are no barriers that would prevent an individual from using IT if he/she chose to do so. However, past research has shown that an individual’s access to resources does affect usage (Mathieson, 1991; Taylor and Todd, 1995). In this vein, Mathieson et al (2001) extended the TAM model to include the impact of perceived resources on IT use. The construct of perceived resources was defined as “the extent to which an individual believes that he/she has the personal and organisational resources needed to use an IT” (Mathieson et al, 2001, p. 90) and so, it should be conceptualised as not an attribute of the technology alone but also of the individual’s environment. Indeed, their findings confirmed that perceived user resources is a valuable addition to the model, since the following categories of items meas-
uring perceived resources were found to significantly influence perceived easy of use, perceived usefulness and IT usage:

a) user attributes; characteristics of the IT user reflecting aspects of users’ expertise with the tasks and system as well as other aspects related to users’ situation and nature of task;

b) support from organisations’ IT staff;

c) system attributes; characteristics of the system itself, including availability, cost of access.

Task refers to the characteristics and nature of the tasks to be performed. Although some researchers (e.g. Eierman et al, 1995) distinguish between tasks and environment as two independent constructs, the more traditional approach is followed in this study whereby task is considered one of the several dimensions of the situational environment (e.g. Sanders and Courtney, 1985; Wierenga and Ophuis, 1997). In particular for the purposes of this study, the complexity/simplicity as well as the nature and discipline focus of the taught module were used as situational environment variables, followed by McDonnell (2000) who showed that asynchronous communication significantly enhances instruction relating to problem based and practical issues in tourism and hospitality education.

Christou and Sigala (2000) also found that tourism and educators’ intention to use multimedia in their instruction is influenced by their perceptions regarding multimedia easy of use and usefulness as well as the level of technical support that they receive.

**Research Methodology**

**Development and measurement of constructs**

Respondents were asked to report for what and how often they used the www and electronic discussion groups (Table 2 and 3). Usage levels of www and of electronic discussion groups were measured for each respondent by summing up his score for each activity. As previously analysed, five factors are identified as potential influences of usage levels namely perceived easy of use, perceived usefulness, user support, system attributes and user attributes that were measured as follows (Table 1):

- Perceived Internet easy of use was captured by a construct called Internet functionality which was evaluated by a 10 item five point Likert scale;
- Perceived Internet usefulness as an educational tools was measured by a four item five point Likert scale;
- IT support was measured by a four item five point Likert scale;
- Internet attributes were measured by a 13 item five point Likert scale regarding Internet technology and information availability and accessibility as well as cost constraints;
- User attributes were captured by two constructs namely user competence with technology (a 6 item Likert scale) and nature of task that was evaluated on a multiple five-item semantic differential scale reflecting the nature and complexity/simplicity of the taught modules.
**Table 1: Constructs’ measurement**

<table>
<thead>
<tr>
<th>Perceived functionality (easy of use) of Internet tools</th>
<th>Strongly agree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Internet is a valuable source for gathering information</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>The Internet is a valuable tool for distributing information</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>The Internet is a fruitful platform for developing learning material</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Internet tools are valuable for developing online discussion groups</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>The Internet is quite slow</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Information provision on the Internet is chaotic</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Electronic discussions are not fruitful because writers cannot interact with others (i.e. discussions lacks visual clues)</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>The Internet is valuable for keeping up to date</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>There are no appropriate portals for identifying web resources</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>The Internet is of no significant value as an educational tool</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

**Perceived Internet usefulness as an education tool**

<table>
<thead>
<tr>
<th>Perceived level of IT support</th>
<th>Strongly agree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet provided me with data not accessible to me before</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>The Internet allows faster information gathering than the use of other information resources</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Internet tools enable the development of interactive discussions that were not possible to achieve before</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Internet tools allow immediate distribution of information that was not possible before</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

**Perceived level of IT support**

<table>
<thead>
<tr>
<th>Perceived level of IT support</th>
<th>Strongly agree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>To get help from an IT personnel is easy</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Information regarding Internet tools is available &amp; accessible</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>The extent of user support is appropriate</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Problems/requests are answered reliably and quickly</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

**Perceived Internet attributes**

<table>
<thead>
<tr>
<th>Perceived Internet attributes</th>
<th>Strongly agree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of student access to computer laboratory resources</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Lack of student training in Internet related areas</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Lack of faculty training in Internet related areas</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Lack of faculty access to computer laboratory resources</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Lack of relevant informational/educational Websites</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Lack of access to relevant information portals</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Computer equipment constraints</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Lack of comprehensive directory of web resources/portals</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Lack of student incentives to use the Internet</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Lack of appropriate educational software</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Very slow Internet connections</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

**Perceived user competencies with:**

<table>
<thead>
<tr>
<th>Perceived user competencies with</th>
<th>Strongly agree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer software</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Computer hardware</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Browsing the Internet</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Developing electronic discussion groups</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Using electronic discussion groups</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Using e-mail</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

**Nature of taught modules**

<table>
<thead>
<tr>
<th>Nature of taught modules</th>
<th>Very complex</th>
<th>Very basic</th>
<th>Very theoretical</th>
<th>Very practical</th>
<th>Very specialised</th>
<th>Not complex</th>
<th>Not basic</th>
<th>Not theoretical</th>
<th>Not practical</th>
<th>Not specialised</th>
</tr>
</thead>
</table>
Cronbach’s coefficient $\alpha$ was used to assess the reliability of all multi-item scales. Since, all scales showed reasonable reliability (i.e. $\alpha>0.70$), the reliability test was passed. Data regarding the educators’ demographic profile (i.e. age, number of years teaching, gender, field of taught module, level of academic post) were also gathered in order to assess whether these contextual factors had any effect on Internet usage level, perceived usefulness and easy of use.

Data collection

A survey was developed to generate responses in a convenient, cost effective and anonymous manner from tourism and hospitality educators who were widely dispersed in many countries; the target research population was educators from several institutions all over the world. However, due to objective lack of available data regarding the exact number of the members of the population, it was not possible to carry out a structured probability sampling method. Instead, a non-probability sampling method was selected, based on specific parameters and sampling frames. The main sampling parameters used (which were also used as sampling frames) were memberships in academic e-mail lists. The lists used (through which questionnaires were also distributed) were: the U.K.’ tourism education listserv (tourism@jiscmail.ac.uk), the TRINET (trinet-l@hawaii.edu), the International CHRIE listserv (members@chrielist.org), the ATLAS listserv (atlasdisc@yahoogroups.com) and the EuroCHRIE listserv (e-eurochrie@yahoogroups.com).

The survey instrument was a specially developed questionnaire with close-end multiple-choice questions and statements that had to be rated on a Likert-type scale. All questions were written in English. The questionnaire was sent to the sample units in electronic form; it was mailed as e-mail Word2000 attachment by using Outlook Express 5.5. An explanatory e-mail message accompanied each attached questionnaire. The potential respondents were asked to send back the completed questionnaire in the form of an e-mail Word attachment as well. Completed questionnaires were received from 91 faculty members; 82 of these questionnaires (90.1%) were usable.

Results

Respondents’ profile

As concerns respondents’ profile, the majority of them were lecturers (47%), fewer were senior lecturers (34%), a small proportion were professors (12%) and only 7% were readers. This is compatible with findings regarding the age profile and teaching experience of respondents. So, most respondents (43%) were between 31-40 years, fewer (36%) between 23-30 years and the remaining (21%) were more than 40 years old. A great percentage (56%) of respondents had been teaching in tourism and/or hospitality for 5 to 10 years, fewer (34%) for less than five years and 10% for more than 15 years. Male and female respondents had a similar representation in the sample (54% were male). Respondents also represented a diversified sample in terms of the generic disciplines they had been teaching. Specifically, research methods and strategic management attracted the most respondents, 42% and 30% respectively, modules of operations management and marketing were taught by fewer respondents, 21% and 14% respectively, while finance & accounting, HRM, IT management, marketing and organisational behaviour attracted fewer respondents, 7%, 11%, 3%, 3% and 1%, while only one respondent taught economics.
Type and levels of usage of www and electronic discussion groups

Table 2 illustrates data regarding respondents’ use of the Web. “Searching for information/data”, “looking for real case study examples”, “searching and reading academic articles” and “providing links with industry news to students” were the most heavily used activities by a great proportion of respondents. In contrast, a great majority of respondents claimed to use the www for “publishing learning material”, “publishing information regarding the module”, “conduct exams and student assessment”, “gathering student feedback” and “conduct course evaluation” very infrequently and in some instances not at all. Usage level for each respondent were calculated and used to investigate whether the type of module taught had any significant effect on www usage levels. An ANOVA and the Scheffe post hoc tests revealed (2.823, p=0.01) that respondents involved in teaching strategic management significantly differ in their www usage score from those teaching research methods and operations management. Due to the small research sample, only the effect of these three types of modules could be investigated, but because of the significant differences that were found, future research should further investigate on the reasons of any such differences (e.g. lack of portals for searching information regarding particular modules and issues such as operations management), in order to identify areas where resources and efforts should be focused.

Table 2: Use of www for education purposes (% of respondents)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Not at all</th>
<th>Very often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Searching for information/data</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Looking for real case study examples</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>Searching and reading academic articles</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Providing links with industry news to students</td>
<td>7</td>
<td>27</td>
</tr>
<tr>
<td>Publishing learning material</td>
<td>35</td>
<td>28</td>
</tr>
<tr>
<td>Publishing information regarding the module (e.g. syllabus)</td>
<td>31</td>
<td>18</td>
</tr>
<tr>
<td>Conduct exams &amp; student assessments</td>
<td>46</td>
<td>32</td>
</tr>
<tr>
<td>Gathering student feedback</td>
<td>32</td>
<td>36</td>
</tr>
<tr>
<td>Conduct course evaluation</td>
<td>45</td>
<td>27</td>
</tr>
</tbody>
</table>

Respondents also reported very limited use of electronic discussion groups (Table 3). The latter were reported to be frequently used for “communicating with” and “distributing information to students” only. Fewer respondents used electronic discussion groups for “providing student feedback”, while the remaining of the activities attracted very limited use for a great majority of respondents. Again, electronic discussion usage levels were calculated and used in order to investigate whether respondents involved in teaching different modules significantly differed in their usage levels. However, an ANOVA test revealed that the type of taught module (i.e. strategic management, operations management and research methods) did not significantly affect respondents’ usage levels of electronic discussion groups.
Table 3: Use of electronic discussion groups for education purposes (% of respondents)

<table>
<thead>
<tr>
<th></th>
<th>Not at all</th>
<th>Very often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate with students</td>
<td>2</td>
<td>14</td>
</tr>
<tr>
<td>Distribute information regarding the module</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td>Provide student feedback</td>
<td>12</td>
<td>43</td>
</tr>
<tr>
<td>Distribute learning material</td>
<td>24</td>
<td>14</td>
</tr>
<tr>
<td>Conduct exams/assessments</td>
<td>34</td>
<td>37</td>
</tr>
<tr>
<td>Conduct course evaluation</td>
<td>43</td>
<td>37</td>
</tr>
<tr>
<td>Develop online discussion groups or virtual communities</td>
<td>58</td>
<td>38</td>
</tr>
</tbody>
</table>

Factors affecting Internet’s tools usage levels

In order to investigate the impact of the five constructs on Internet and electronic discussion groups usage levels the following steps were conducted. Scores of each of the five constructs were calculated for each respondent by summing up his/her scores in all items, and then Pearson correlations were calculated (Table 5). Data regarding descriptive statistics of the four constructs are provided in Table 4. The low mean values for perceived easy of use, usefulness, user competencies and support relative to the maximum potential that it could have been achieved indicates that respondents have relatively limited skills and supports for using the Internet, which in turn might also affect their low perceptions regarding the easy of use and usefulness of Internet tools.

Table 4: Descriptive statistics

<table>
<thead>
<tr>
<th></th>
<th>Mean</th>
<th>Standard deviation</th>
<th>Min</th>
<th>Max</th>
<th>Potential Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceived Internet usefulness</td>
<td>11.65</td>
<td>1.09</td>
<td>9</td>
<td>14</td>
<td>20</td>
</tr>
<tr>
<td>Perceived Internet easy of use</td>
<td>24.51</td>
<td>2.43</td>
<td>13</td>
<td>36</td>
<td>50</td>
</tr>
<tr>
<td>Perceived IT support</td>
<td>7.42</td>
<td>0.55</td>
<td>4</td>
<td>13</td>
<td>20</td>
</tr>
<tr>
<td>Perceived Internet attributes</td>
<td>23.58</td>
<td>2.09</td>
<td>16</td>
<td>47</td>
<td>55</td>
</tr>
<tr>
<td>Perceived user IT competence</td>
<td>19.14</td>
<td>2.98</td>
<td>8</td>
<td>26</td>
<td>30</td>
</tr>
</tbody>
</table>
Table 5: Pearson correlations among constructs

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceived Internet usefulness (1)</td>
<td>1.00</td>
<td>0.432*</td>
<td>0.354</td>
<td>0.401</td>
<td>0.564*</td>
<td>0.378</td>
<td>0.721*</td>
<td>0.442</td>
</tr>
<tr>
<td>Perceived Internet easy of use (2)</td>
<td>1.00</td>
<td>0.634*</td>
<td>0.329</td>
<td>0.632*</td>
<td>0.295</td>
<td>0.541*</td>
<td>0.672*</td>
<td></td>
</tr>
<tr>
<td>Perceived IT support (3)</td>
<td></td>
<td>1.00</td>
<td>0.374</td>
<td>0.473</td>
<td>0.202</td>
<td>0.590*</td>
<td>0.762*</td>
<td></td>
</tr>
<tr>
<td>Perceived Internet attributes (4)</td>
<td></td>
<td></td>
<td>1.00</td>
<td>0.329</td>
<td>0.479</td>
<td>0.658*</td>
<td>0.348</td>
<td></td>
</tr>
<tr>
<td>Perceived user IT competence (5)</td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
<td>0.436</td>
<td>0.586*</td>
<td>0.785*</td>
<td></td>
</tr>
<tr>
<td>Nature of taught modules (6)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
<td>0.356</td>
<td>0.426</td>
<td></td>
</tr>
<tr>
<td>Usage level of WWW (7)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
<td>0.396</td>
<td></td>
</tr>
<tr>
<td>Usage level of electronic discussion groups (8)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
<td></td>
</tr>
</tbody>
</table>

* (Pearson coefficients at significant level p=0.001)

In Table 5 significant correlations (at a significant level of p=0.001) between constructs are indicated with an asterisk. Significant positive correlations were found between perceived Internet usefulness and www usage level (α = 0.721) as well as between perceived Internet easy of use and www usage level (α = 0.541) and electronic discussions usage level (α = 0.672). Perceived IT support was also found to significantly affect both www and electronic discussion groups usage levels (α = 0.590 and α = 762 respectively). However, because a significant correlation between perceived IT support and perceived Internet easy of use was found the effect of IT support and easy of use of Internet tools usage levels may be inflated due to any confounding effects between these two former constructs. Perceived user IT competence was also found to significantly affect www and electronic discussion usage levels, but again its impact might be inflated because of its significant correlation with perceived Internet easy of use and Internet perceived usefulness. The construct perceived Internet attributes (reflecting availability and accessibility to Internet technologies and information) significantly correlated only with www level of use and which is not surprising. The nature of taught modules was not found to have any significant impact on any construct.

Although the strength of the significant impact of the four constructs on www and electronic discussion groups may be compounded by their inter-correlations, research findings are crucial for further plans and strategies aiming at incorporating Internet in education. In particular, future plans and strategies should aim at increasing educators’ levels of awareness, competencies and support for using the Internet for educational purposes in order to overcome any real obstacles restraining or putting off educators from incorporating Internet in their instruction. Moreover, such practices would also in turn enhance and support users perceptions regarding Internet usefulness and easy of use, which were also found to have a significant effect on usage levels. Thus, educators training and support are vital issues that institutions need to consider if Internet is to be effectively implemented in current educa-
tional practices. Moreover, as the nature of module did not significantly affect www and electronic discussion groups’ usage levels, it can be concluded that Internet tools are perceived to be equally beneficial for the delivery and enhancement of any tourism and hospitality course irrespective of each complexity, practicality and/or specificity.

Further discussion

Educators use Internet tools (www and electronic discussion groups) more for enhancing their educational material, (i.e. searching for articles, gathering data about the industry and dissemination of lecture notes) and less for complementing and enhancing their educational modes (i.e. enable collaborative working and interactive communications through virtual communities, conduct examinations and assessments, publish multimedia educational material). The pattern of Internet’s tool usage levels differed depending on the type but not the nature of taught modules, meaning that reasons other than the particular educational needs and requirements for delivering a module (e.g. availability of online resources) are responsible for current usage levels. The significant impact of the other four constructs on www and electronic discussion usage levels indicates that institutions should further aim at increasing educators awareness levels, technology competencies and support in order to encourage successful implementation of Internet tools in instruction.

Moreover, as the Internet is currently mainly exploited as a mechanism for information distribution and gathering, there is a need for fully exploiting Internet’s interactive and networking capabilities in order to extend its role to a vital tool for continuous pedagogical innovation and improvement in teaching and learning processes. In addition, the currently but limited publication of learning material in digital form coupled with the limited available technological competencies and support raise an important question regarding the appropriateness of the form of digital material. There is a need to ensure that material made available to students is more than simple digital photocopies of current texts and that it truly takes advantage of the potential of the Internet (i.e. interactivity, personalisation, use of multimedia resources). To that end, reported difficulties regarding lack of technological resources, support and skills should be overcome.

Conclusions

The purpose of this study was to investigate current levels of use and factors affecting the adoption of Internet tools, i.e. www and electronic discussion groups, for enhancing and complementing traditional modes of teaching tourism and hospitality courses. Research findings revealed that Internet tools’ and capabilities are very limited used and explored for educational purposes. Educators treated Internet as a simple information sharing and search medium, but findings revealed that perceived Internet usefulness, easy of use and attributes as well as perceived IT support and user IT competencies had a significant effect on reported patterns of Internet’s educational implementation. In this vein, in order to allow educators to further increase and enhance their type and levels of use of Internet’s tools in their pedagogical modes, institutions should overcome obstacles regarding educators’ awareness of technological capabilities, technological competencies and support.

Overall, the resource issue notwithstanding, encouraging faculty to use the Internet in their tourism and hospitality course pedagogies may be a two-step process. First, the learning advantages, resource availability, and ease of use must be apparent in order to encourage faculty to experiment with Internet-supported teaching. However, experimentation does
not guarantee continuation. To promote continued usage, Web resource directories and instructional webpages have to be sufficiently comprehensive, well organised, widely publicised and easily accessible as well as constantly updated to keep pace with the ever-changing fields of tourism and hospitality management.

References


Internet in tourism and hospitality education: towards the development of an e-learning model

Marianna Sigala1, University of Strathclyde

Abstract

Recent developments on the Internet are having a tremendous impact on the education process transforming educational curricula, learning materials and instructional practices. The advantages of e-learning as well as its applicability and benefits for tourism and hospitality education are now also starting to be recognised. However, although an increasing number of tourism and hospitality educators are adopting and incorporating Internet tools in their instruction, only very few of them are fully exploiting the Internet’s capabilities to transform and extend their pedagogical models. On the other hand, it is generally agreed that we are still in the experimental stage for creating Internet learning environments. In this vein, this paper aims at developing a framework for developing more successful technically, pedagogically and personally online environments for enhancing and/or delivering tourism and hospitality education. To that end, models of e-learning instructions are being identified, reviewed and critically evaluated. However, because the evaluation of any form of learning should be based on a theoretical framework to allow for the interpretation of results, the pedagogical underpinnings and aims of the examined e-learning models are analysed and mapped into a three-era framework of e-learning pedagogy. Ultimately, an e-learning model aiming at the development of a supportive online learning environment that matches individual learning differences and abilities is proposed. The benefits of this e-learning model for tourism and hospitality education are identified and advocated.

Keywords: tourism; hospitality; Internet; education; pedagogy; e-learning models.

1 Corresponding author:
Marianna Sigala, Scottish Hotel School, University of Strathclyde, 94 Cathedral Street, Glasgow, G4 0LG, United Kingdom.
Tel.: +44-141-548-3949, Fax: +44-141-552-2870.
E-mail: M.Sigala@strath.ac.uk
1. Introduction

Recent developments on the Internet are having a tremendous impact on the education process transforming educational curricula, learning materials and instructional practices. Specifically, because of its enhanced interactivity, connectivity and convergence (Sigala, 2001a), the Internet is released as an education delivery platform enabling students to receive and interact with educational materials and to engage with teachers and peers in ways that previously may have been impossible. The advantages of e-learning are widely mentioned, e.g. life long learning opportunities, alleviating spatial and time constrains, catalyst for institutional transformation (Poehlein, 1996), while its applicability and benefits for tourism/hospitality education are now also starting to be recognised (Cho and Schmelzer, 2000; Christou and Sigala, 2000; Sigala, 2001b; Harris, K. J. and West, J. J., 1993; Kasavana, M.L., 1999). However, although an increasing number of tourism and hospitality educators are adopting and incorporating Internet tools in their instruction, only very few of them are fully exploiting the Internet’s capabilities to transform and extend their pedagogical models (Sigala and Christou, 2002). On the other hand, it is generally agreed that we are still in the experimental stage for creating Internet learning environments (e.g. Martinez and Bunderson, 2000; Mason, 1998; Campos et al, 2001). Coupled with the low completion and effectiveness rates of web learning (Sigala, 2001b), it is made evident that more needs to be learned about designing successful online environments, technically, pedagogically and personally.

It is the aim of this paper to develop a framework for the design and implementation of effective e-learning models for enhancing and/or delivering tourism and hospitality education. To that end, models of e-learning instructions are being identified, reviewed and critically evaluated. However, because the evaluation of any form of learning should be based on a theoretical framework to allow for the interpretation of results (Rice, 1984), the pedagogical underpinnings and aims of the examined e-learning models are analysed. Based on the literature review, a framework mapping the evolution of e-learning pedagogy into three eras of e-learning models is developed and analysed. Ultimately, an e-learning model aiming at the development of a supportive Web learning environment that matches individual learning differences and abilities is proposed. The benefits of this model for tourism and hospitality education are identified and discussed.

2. Internet pedagogical evolution; e-learning models

2.1 Transfer of traditional instruction on the Internet

This is the earliest and most extensive category of online instruction (Sigala and Christou, 2002). E-learning models under this category do not fully exploit Internet capabilities for transforming and enhancing instruction, but they rather imply and demonstrate a simple transfer of traditional practices on the Internet. This simple webification of learning processes is evident in the learning material, in student-tutor and student-student interactions as well as assessment procedures. Moreover, as the principles and aims of instruction do not change, the roles and tasks that students and tutors should assume and undertake also stay the same.

With the advent of the Internet, more and more educators are exploiting the publishing and distributing capabilities of Internet tools (e.g. WWW, e-mail) in order to make their educational materials available and accessible online and so, overcome time (365x7x24 hours) and place (any place, any platform, e.g. Internet enabled personal digital assistants)
barriers. However, the use of the Internet for publishing and distributing learning material that was originally designed to be delivered in traditional classroom learning environments does not entail any technology fostered educational innovation as well as any enhanced learning benefits. Instead, such practices result in computer-based learning environments that can be characterised as “page turning devices” (Mason, 1998) of material that is a simple digital photocopy of current texts and so, which fall short of the interactive, user-centric claims originally made for them. On the contrary, online instruction requires the development of interactive course material that offers learners genuine choice of learning routes and methods, a range of multimedia content (i.e. video, audio, graphics and text) and opportunities to interact meaningfully with content. However, the design of online educational material requires a lot of human and financial resources. Sigala and Christou (2002) and Gold (2001) reported that educators’ training and support for the development of online learning environments is a crucial parameter for developing effective e-learning practices.

Educators are also exploiting Internet networking and interactive capabilities for communicating with students as well as for simulating discussions found in traditional classrooms and extending them beyond the classroom walls. E-mail, discussion forums, chat rooms are some of the Internet tools being exploited in order to stimulate and foster online dialogues amongst students and educators (Hammond, 2000). However, while the technology tends to support a certain degree of egalitarian participation, and does allow users the freedom to input messages at their convenience, the conditions which are needed to produce good educational discussions are far more complex, more people-dependent and more educationally determined than mere technology will ever influence very significantly (Mason, 1998).

In the same vein, educators use Internet for delivering their traditional evaluation practices. Web-in-a-box software customised for education offers forms for easy creation of multiple choice tests as well as assignment submission systems and record keeping facilities, that can significantly relieve tutors of the more tedious aspects of marking and its relevant administration. However, the form and content of current assessment procedures are long overdue for a rethink. Mason (1998) argued that existing assessment practices are ill suited to the digital age in which using information is more important than remembering it, and where reusing and applying material should be viewed as a skill to be encouraged, not as a plagiarism to be despised. In contrast, nowadays, assignment and assessment procedures should reflect the increasing need to develop students’ information literacy and knowledge management skills.

Overall, as Pallof and Pratt (1999) argued the simple re-implementation of conventional models borrowed from classroom based or distance education focused on passive transmission would permit only marginal improvements. However, as e-learning affects the definition, design and delivery of education, there is a need to re-examine how knowledge and skills are acquired as well as how learning in online contexts actually occurs. The second wave of e-learning pedagogy models illustrates a more educational than technology determined approach to e-learning that matches Internet’s capabilities and tools to principles of instruction. As Collis (1996, p. 146) argued “it is not the technology but the instructional implementation of the technology that determines the effects on learning”.

### 2.2 Online collaborative and constructive learning models

The Internet capabilities imply a different type of thinking in terms of how to make full use of its learning-enhancing features and pedagogical potential. Because one of the key affordances of the Internet is for communication, (e.g. through email, bulletin boards, chats, electronic conferencing), the combination of collaborative techniques with technology are
argued to significantly enhance the learning process and learning outcomes dramatically (Cicognani, 2000; Isenhour et al, 2000; Scardamalia and Bereiter, 1993). Harasim (2000) also advocated that the asynchronous, hypertext and multimedia based nature of the technology represents cognitive advantages - such as flexibility with regard to the nature of interaction (i.e. immediate response for more reflected feedback), reflection on stored communication or reduction of discriminatory communication patterns based on physical features and social clues - that provide an augmented domain for collaborative learning. In this vein, the electronic implementation of collaborative learning often results in the development of a virtual classroom, whereby tools such as electronic bulletin boards, chat rooms, e-mails, grade books and quizzes are used in order to provide feedback, distribute material and develop a learning community similar to a traditional classroom (Hammond, 2000; Wachter et al, 2000; McConnell, 1996; Dobing, 1995; Hiltz, 1990 and 1994; Massetti and Lobert, 1997; Tehranian, 1996). Thus, e-learning models are increasingly adapting a pedagogical approach that is based on the theoretical and philosophical underpinnings of constructivism (or critical thinking skills) and collaboratism educational theories.

Kurfiss (1988, p. 2) argued that critical thinking is an “investigation whose purpose is to explore a situation, phenomenon, question or problem, to arrive at a hypothesis or conclusion about it that integrates all available information and that can therefore be convincingly justified”. Constructivism is an epistemology of how people learn and assimilate new knowledge asserting that knowledge is acquired by a process of mental construction. According to Piaget (1977) the four processes of knowledge construction are as follows:

1. Assimilation; associate new events with background knowledge and prior conceptions;
2. Accommodation; change existing structures to new information;
3. equilibrium; balance internal understanding with external “reality” (e.g. other’s understanding);
4. Disequilibrium; experience of new invent without achieving a state of equilibrium.

In short, people assimilate new knowledge by producing cognitive structures that are similar to the experiences they are engaged in. they then accommodate themselves to these newly developed knowledge structures and use them within their collection of experiences as they continue to interact with the environment. Thus, knowledge is not separate from but rather embedded within experiences and interpreted by the learner or as Gold (2001) argued knowledge is about interpretation and making meaning of the environment. King (1994) also advocated that knowledge is created by searching for complexity and ambiguity, looking for and making connections among aspects of a situation and speculation. Thus, overall, people should think critically, have the ability of analysing situations, search for evidence and seek links between a particular situation and their prior knowledge and experience.

In this vein, constructivism includes different types of knowledge construction than rote memorisation of factual knowledge or procedures. Learners aim at building or re-inventing knowledge by going through a search process of meaning. So, when learners are exposed to new information, each learner evaluates and analyses it, sees the relationships between the new information and his or her existing knowledge and makes inferences and judgements for new knowledge. In this process, instructors should act as facilitators, while students actively participate in the learning process and control their learning pace. Akyalcin (1997) summarised the facilities and tools of virtual learning environments that can be used for implementing online constructivism learning environments by mapping Piaget’s four processes involved in the construction of knowledge to online instruction components (Table 1).
Table 1. Constructivist components within virtual classrooms

<table>
<thead>
<tr>
<th>Processes</th>
<th>Instructional principles</th>
<th>Virtual classrooms components</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assimilation</td>
<td>• Gauge the learner’s previous knowledge and experience&lt;br&gt;• Orient the learner to his learning environment&lt;br&gt;• Solicit problems from the learner and use those as the stimulus for learning activities, or establish a problem such that the learners will readily adopt the problem as their own&lt;br&gt;• Support all learning activities to a larger tasks or problem. The learner should clearly perceive and accept the relevance of the specific learning activities in relation to the larger task.</td>
<td>• Pre-test&lt;br&gt;• Introductory posts&lt;br&gt;• Syllabus, to Do lists, glossary, course information, FAQ, Synchronous chat&lt;br&gt;• Course testing and revision, class content, synchronous chat, online lectures and readings, non-graded, starter activities, facilitative questions&lt;br&gt;• Individual unit activities leading to team project</td>
</tr>
<tr>
<td>Accommodation</td>
<td>• Design the learning environment to support and challenge the learner’s thinking&lt;br&gt;• Design the task and the learning environment to reflect the complexity of the environment in which they must function after the learning has occurred&lt;br&gt;• Encourage testing ideas against alternative view and alternative contexts</td>
<td>• Modularise content so as to scaffold learning, Behaviour modelling by facilitator, Quizzes for reinforcement, Compare and contrast activities, facilitate questions, discussions forum feedback by other students and facilitator&lt;br&gt;• Online course delivery, Modelling of course structure and components, team project&lt;br&gt;• Discussion forums, modularise content to introduce new concepts quickly, compare and contrast activities, interactive essay and facilitate questions</td>
</tr>
<tr>
<td>Equilibrium</td>
<td>• Design an authentic task. An authentic learning environment is one which the cognitive demands in the environment for which the learner is being prepared.&lt;br&gt;• Provide an opportunity for reflection on both the learning content and process</td>
<td>• Team project&lt;br&gt;• Facilitator evaluation of team projects, Auto-marked quizzes, Open student evaluation to instructor</td>
</tr>
<tr>
<td>Disequilibrium</td>
<td>• Provide an opportunity for changing and enhancing, drafting and redrafting&lt;br&gt;• Challenge misconceptions</td>
<td>• Unit summaries of student discussions&lt;br&gt;• Student’s and facilitator’s feedback, project gallery, post-test</td>
</tr>
</tbody>
</table>

Source: Akyalcin (1997)
On the other hand, Harasim (1990) defined collaborative learning as “... the many educational approaches involving joint intellectual effort by students and teachers together. Most collaborative learning activities focus on the student’s exploration and application of the course material, not the teacher’s representation of it”. However, this characterization shows that the term does not reflect a single comprehensive theory, rather it should be understood as an umbrella term. Kay (1992) more precisely defined the concept as “… the acquisition by individuals of knowledge, skills, or attitudes occurring as the result of group interaction, or put more tersely, individual learning as a result of group process”. This definition does not mention individual study explicitly, but this does not exclude such activities. In collaborative learning, group processes are a part of the individual learning activity – individual and collective activities are mutually dependent on each other. Thus, collaborative learning views individual learning as a result of group processes.

Indeed, for some collaboratism is viewed as a variation of constructivism (e.g. Tam, 2000; Vygotsky ‘s theory of social constructivism, 1986), whereby social interaction is a key ingredient in the learning process and anything which affects how it takes place may affect it (Wertsch, 1991). For example, Bruffee (1999) argued that knowledge is a construct of the community’s form of discourse, maintained by local consensus and subject to endless conversation and that learning is a social, negotiated, consensual process.

Koschmann (1996) also considered discourse and interactions as a fundamental aspect of learning by arguing: “learning is enhanced by articulation, abstraction and commitment on the part of the learner: instruction should provide opportunities for learners to articulate their newly acquired knowledge”. Articulation is a cognitive act in which the student presents, defends, develops and refines ideas. Thus, in order to articulate their ideas, students must organise their thoughts and information into knowledge structures. Ultimately, active learners participation in online discourses leads to multiple perspectives on issues, a divergence of ideas and positions that students must sort through to find meaning and convergence. However, according to Jones et al (2000) it is the conflict and collision of adverse opinions that lead to cognitive growth and development of problem-solving skills.

Thus, in collaborative learning settings, the emphasis is placed on interactions as common understandings are negotiated and developed across differences of knowledge, skills and attitudes. Indeed, collaborative learning should thrive on these differences. Learning is stimulated through conversations between persons or among groups and involves the creation and interpretation of communication (Chapanis, 1975; Shegloff, 1991; Shegloff and Sacks, 1973). Conversations are the means by which people collaboratively construct beliefs and meanings as well as iterate the differences between them, (Goodwin and Heritage, 1995; Suchman, 1988). And as Cooper et al (1994) argued learning is enhanced by the construction of knowledge through discussion, information and knowledge sharing that can be based on different understandings and opinions.

At the present online discourses are the “heart and the soul” of online education enabling interaction, conceptual exchange and collaborative convergence. Clark (2000) identified the following collaboration tools for fostering and supporting collaborative learning in online learning environments:

1. E-mail and its applications such as bulletin boards and e-mail discussion groups, that enable many-to-many communications, whereby students can work in pairs or small groups. The asynchronous nature of e-mail makes it suitable for more complex writing and problem solving tasks than could be accomplished via synchronous discussion in class. However, a disadvantage of e-mail is its lack of organisation and the likelihood of information overload occurring when multiple topics or large groups are involved.
2. Conferences. Conferences can be public allowing everyone to take part, but the posting of all information into one shared area may permit plagiarism, cause information overload and difficult to separate topics of discussions. To that end, conferences can be organised to be private, meaning that membership is limited to the subset of students working on a specific projects. By using several private conferences, students can work on multiple projects with various other students while maintaining organisation, privacy, limiting information overload and assuming control of their learning experience. Another less used option is to develop gated conferences, i.e. permit students to answer questions after they have read the answers and discussions previously posted. This can have the effect of limiting the diversity of responses and of supporting independent thought.

3. Shared document capabilities that allow the author of a document to permit others to make changes to the document. This permits the creation of a shared work without the constant transfer of the document between participants and the logical challenges associated with it.

Overall, it can be argued that the computer conferencing and network capabilities of the Internet tools enable communication and discourses that are best described as a form of discourse-in-writing. The unique attributes of communication in e-learning environments and the cognitive activities that they enhance for augmenting the online learning experience are summarised by Harasim (2000) as follows:

1. **many-to-many (group communication)** enables: motivational (socio-affective) benefits of working through problems with peers; active exchange: rich information environment; identification of new perspectives, multiplicity; opportunity to compare, discuss, modify and/or replace concepts (conceptual exchange); encouragement to work through differences and arrive at intellectual convergence.

2. **time independence** supports: 24 hours access: users can respond immediately or reflect and compose a response at their convenience; unlimited air/time/access; student participation all week, and thereby ongoing knowledge building; participation by users at their best learning readiness time.

3. **place independence** allows: access to the wealth of Web resources (as well as peers and experts); shared interests, not just shared locations amongst participants.

4. **text-based/media-enriched messaging** encourages and contributes to: verbalisation and articulation of ideas; focus on message rather than on the messenger (reduced socio-physical discrimination); clear expression of ideas; rich database/web of ideas.

5. **computer mediated environments** enable: searchable, transmissible and modifiable archived database; multiple passes through conference (discourse) transcript; building tools to exchange and organise ideas and support collaborative learning; building templates, scaffolds, and educational supports for advanced pedagogy; customised learning environments for all disciplines and evidenced-based pedagogies.

In the context of tourism and hospitality education, constructivism and collaborative learning approaches have been applied for the development of a just-in-time (JIT) education model (Table 2) that exploits Internet’s educational capabilities. Specifically, Cho and Schmelzer (2000) proposed the use of listservs, chat rooms and news groups for the development of a virtual learning community that provides learner-centred, random-access, highly interactive multimedia systems 24 hours a day as well as the tools for learners’ interaction both synchronously and asynchronously.
Table 2. Constructs of the JIT educational model

<table>
<thead>
<tr>
<th>Model</th>
<th>Basic premise</th>
<th>Goals</th>
<th>Major assumptions</th>
<th>Implications for instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constructivism</td>
<td>Learning is done by constructing knowledge</td>
<td>Forming abstract concepts to represent</td>
<td>Students learn best when they discover things themselves and when they control the pace of learning</td>
<td>Learner-centered active learning. Instructor as a facilitator.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>reality. Interpreting reality to assign</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>meaning to it.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collaborativism</td>
<td>Learning is done through the shared understandings of more than one learner</td>
<td>Improving communication, listening,</td>
<td>Active participation of learners with previous knowledge is critical to learning.</td>
<td>Instructor as questioner and provider of feedback.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>participation and socialization.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>JIT education</td>
<td>Learning can be done at any time and any place</td>
<td>Creating a virtual learning community</td>
<td>The educational process assumes a new format without a loss of integrity and content and with gains in timeliness and efficiency</td>
<td>The learning process is without boundaries of time and place.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>which provides learner-oriented, random-access, interactive multimedia systems 24 hours a day</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Cho and Schmelzer (2000)

As a methodology, collaborative learning is intended to be a learner-centred rather than an instructor-centred process which emphasizes cooperative or group efforts among faculty members and students. Active participation and interaction on the part of both students and instructors lead to a new knowledge which emerges from the lively dialog of those who are sharing ideas and information. To that end, both learners and instructors should assume and perform new roles if the aims of collaborative and constructivism learning are to be achieved and so, learning benefits to be materialised.

Ideally, the student is a functioning member of a learning community, but it is one who proceeds also to explore, learn and understand on an individual basis independently of the rate of progress of other learners in the group. Moreover, the learner assumes responsibility for specifying individual learning needs, goals and outcomes, planning and organizing the learning task, evaluating its worth and constructing meaning from it (Candy et al, 1994, p. 128). Students, being in the centre of the process, also need to assume a variety of functional roles as interchanges progress and arguments are open to challenge and justification (Bernard et al, 2000).

As e-learning is based on a pedagogical model that emphasizes the ability and role of the learner as responsible for their own learning, students’ perceptions of the themselves and their self-regulatory processes are vital conditions for the achievement of any learning benefits. Porras-Hernandez’s (2000) strongly advocated that e-learning requires participants to be competent self-regulated learners, who Zimmerman (1986, p. 308) defined as “... metacognitively, motivationally, and behaviorally, active participants in their own learning..."
Indeed, in evaluating the factors determining the effectiveness of a collaborative e-learning platform for tourism and hospitality education, Sigala (2001b) provided evidence that students with enhanced self-regulatory and self-control competencies outperformed others. Moreover, Sigala’s (2001b) findings revealed that students participation in the virtual learning environment was both qualitative and quantitative limited, meaning that the majority of students made limited use of the communication tools of the virtual classroom, while when the latter was used interactions focused on sharing material and clarifying rules of instruction rather than on knowledge building practices. Sigala (2001b) attributed this to students’ limited capabilities to handle and understand online environments and to students’ negative perceptions and anxiety regarding the affordance of the communication tools. As a result, students simply transferred their existing learning styles on the Internet.

In this vein, Snow (1980) argued that the students’ cognitive processes (i.e. the way they construct knowledge) should be the primary factor in designing and developing instructional models. This thinking evolved into the identification of cognitive styles (today often called learning styles) to represent the predominant modes of information processing, i.e. the preferred learning sets to the acquisition, retention and retrieval of new knowledge. Schellens and Valcke (2000) argued that the failure of innovative e-learning environments is often attributed to the fact that they are built upon wrong expectations as to learning styles, meaning that the learning styles fostered by the nature of the new learning environment can be inconsistent with the actual learning styles of the students. Valcke (1999) defined the inconsistency between the demands of the learning environment and the actual learning styles of the students as the “congruency problem” of e-learning, which can in turn crucially affect the effectiveness of the latter.

On the other hand, collaborative and constructivism e-learning models also entail tutors to engage into new roles. Indeed, the instructor plays a central role in the effectiveness of online learning. Sigala’s (2001b) findings provided evidence that the following instructor characteristics can influence learning outcomes: attitude towards technology, control of technology, teaching style and in particular, the way he/she facilitates/mediates in e-learning environment experiences.

The importance of the instructor to facilitate and mediate networking capabilities skilfully was highlighted by Harasim (1990 and 1996). In fact, unless, this role is effectively achieved serious problems may arise: e.g. a conference may turn into a monologue of lecture type material to which very few responses are made; it may become a disorganized mountain of information that is confusing and overwhelming for the participants; a large volume of message could create an information overload. In order to avoid such situations two changes are required. First, the teaching paradigm must change for online instruction, away from the traditional lecture format. Second, the instructor has an important role in moderating the instruction.

However, regarding the first requirement, in researching online virtual learning environments, Campos et al (2001) revealed that instructors’ online pedagogical actions cluster into eight categories ranging from totally individual activities to totally collaborative activities (Figure 1). According to Campos et al (2001) it is the pedagogical actions designed by tutors that can enable greater or lessen degree of collaboration, which in turn can provide enhanced or inferior social interactions.
As concerns the second requirement, Feenberg (1989) argued that the instructor should become an online moderator that assumes three crucial tasks (Table 3): contextualising functions, monitoring functions and meta-functions. The role of the first two functions is to compensate for the absence of physical cues found in a traditional classroom. Students must be explicitly told, for example, that the electronic platform serves and can be used as a “class”, a “meeting” or a support group. After a topic is introduced, students’ comments must be monitored to assure that all are participating and that they understand the meeting mode. Meta-communication or communication about communication has two parts. First, it is needed to resolve problems in communication that would be addressed in the classroom by body language or a request to speak-up on the part of the students. Second, comments are needed which summarise the state of a discussion and provide the sense of accomplishment and direction. These are called “weaving” comments and it is particularly with these that the students gets more deeply into the themes (Feenberg, 1989). Overall, because e-learning has both limitations and potential, these first two functions can compensate for the limitations (e.g. lack of face-to-face interaction, overload of unstructured information) of its medium while the third, meta-functions, can give rise to its potential.

Table 3. Moderating functions of computer mediated communication

<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contextualising functions</td>
<td>Opening discussion: announce theme</td>
</tr>
<tr>
<td></td>
<td>Setting Norms: give type of conference</td>
</tr>
<tr>
<td></td>
<td>Setting Agenda: control flow of discussion</td>
</tr>
<tr>
<td>Monitoring functions</td>
<td>Recognition: welcome students, correct context</td>
</tr>
<tr>
<td></td>
<td>Prompting: solicit comments, assign work</td>
</tr>
<tr>
<td>Meta functions</td>
<td>Meta-commenting: remedy problems in context</td>
</tr>
<tr>
<td></td>
<td>Weaving: summarise state of discussion</td>
</tr>
</tbody>
</table>

Source: Feenberg (1989)
However, according to Campos et al’s (2001) findings, tutors engaged in different roles depending on the types of pedagogical actions (Figure 1) that they initiated. Two major roles of tutors were identified namely, the facilitator and the publisher roles. Publishers acted as lecturers of regular classrooms that used the virtual learning environment strictly to publish and share materials related to the courses and to provide links to resources. However, findings revealed that this “lecturing” role encouraged instructor-student interaction rather than student-student interaction. On the other hand, a continuum and escalation of facilitation methods were found: observation, moderation and negotiation. Most educators observed what was taking place in online conferences. However, when discussions were inappropriate to the learning direction, few instructors chose to moderate and take action by guiding the ongoing student learning processes and reflecting on student discussions, sharing summaries of contributions and/or understanding the discussions for continued debate. Finally, only some educators went beyond moderating the learning process to engage in the negotiation of meanings, the role of redefinition and become, along with their students, knowledge builders. In fact, a negotiator role requires educators to collaborate with students to provide the conceptual means of fine-tune discussions and to help them build an environment in which higher-order argumentation could take place.

Thus, based on their findings Campos et al (2001) argued that it is not the technology but rather the level of collaboration triggered by the pedagogical action initiated by the educator as well as his/her moderating role that define a virtual networked classroom. In this vein, they identified three types of virtual classrooms as follows:

1. the net-showroom; a networked classroom in which online learning environments are spaces for publishing and viewing materials and pedagogical actions satisfy only a primary level of knowledge sharing.

2. the net-meeting room; a networked classroom in which virtual learning environments are used as cooperative spaces for highly structured interactions and online pedagogical actions trigger knowledge exchange through conferencing yet without a strong commitment to knowledge sharing and negotiation of meanings.

3. the net-workshop room; a network classroom that uses collaborative virtual spaces for social learning and collaborative knowledge building.

Although Campos et al (2001) argued that the net-workshop model is the one in which educators can take full advantage of the networked technologies to enhance and advance online teaching and learning, their findings did not provide any evidence of the superiority of any type of classroom. However, their findings are compatible with those of earlier studies (e.g. Bunderson and Dunham, 1970; Cronbach and Snow, 1977; Melton, 1967) revealing that interactions of instructional treatment with cognitive aptitudes and learning outcomes are inconsistent and hard to replicate. In other words, although instructional design strategies can reduce or wholly remove the impact of cognitive abilities on learning, learning outcomes are not consistent because some learners may dislike the instruction style (e.g. extensive learner control) while others may love it.

This is mainly because the cognitivist thinking of the online collaborative and cognitive learning has failed to take into consideration a whole-person understanding of how individuals learn online (more than just how they process, build and store knowledge). For example, Cronbach and Snow (1977) concluded that an understanding of cognitive abilities considered alone would not be sufficient to explain learning, individual learning differences and aptitude treatment interactions. Later, Snow (1989) illustrated how in cognitive psy-
hology conation as a learning factor has been “demoted” and since it seems not really to be a separable function it is merged with affection. Ultimately, these factors are viewed as mere associates or products of cognition and then ignored. On the other hand, as many web learning researchers and designer are finding that conventional cognitive solutions are not enough, they are re-discovering the need to increase their focus on the conative (desires, intentions) and affective (emotions, feelings) factors that influence learning. These developments set the stage for an emerging approach to e-learning, that of the personalised and adaptive e-learning models. This is analysed in the following.

### 2.3 Personalised and adaptive (mass customisation) e-learning models

After reviewing and illustrating how research of several years focused on primarily cognitive models reveals that these solutions have often proved unpredictable and unstable, especially for online learning, Reeves (1993, p. 40) strongly advocated the need for more reliable theoretical foundations by arguing that “...much of the research in the field of computer-based instruction is pseudoscience because it fails to live up to the theoretical, definitional, methodological and/or analytical demands of the paradigm upon which it is based”. This is because much of our evolving understanding and research on individual learning differences remains broadly focused on cognitive interests and intrinsic or extrinsic mechanisms for information processing and knowledge building. As a result, consideration of an important piece of learning is missing, because primarily cognitive solutions often overlook fundamental whole-person learning needs (such as the dominant influence of emotions and intentions) for self-directed and self-motivated learning.

In this vein, researchers and designers are seeking more sophisticated learning theories based on proven research showing how brains works, e.g. recent neuroscience research is revealing how the brain’s emotional system influence how individuals learn and memorise facts. Such developments reflect research based on a learning orientation approach (Martinez, 1999; Martinez and Bunderson, 2000), which attempts to reveal the dominant power of emotions and intentions on guiding and managing cognitive processes (no longer demoted to a secondary role). As the aim of learning orientation research is to understand the interactions between higher order psychological influences on learning, it goes beyond learning style research that is mainly focused on the influence of cognitive aspects on individual learning. Moreover, by understanding the structure and nature of the complex relationships between learning orientations and interactions, the learning orientation research aims at developing instructions that do not fit the average person but fit groups of students with particular aptitude patterns. In other words, learning orientation research is leading the way for personalised or adaptive online learning environments and instruction that identify and address aggregate types or segmented populations of learners (i.e. mass customisation).

Specifically, Martinez (1999) advocated that the Learning Orientation Theory hypothesises that understanding the depth of an individual’s emotions, intentions and intentions’ about why, when and how to use learning and how it can accomplish personal goals or change events is fundamental to understanding how successfully the individual learners, interacts with an environment, commits to learning, performs and experiences learning change. In contrast, how well instructors and course designers understand and match learning orientations, is, in turn, how well they can present instruction that fosters self-motivation, encourages online relationships and supports successful learning and performance. The Learning Orientation Theory provides guidelines for developing learner-difference profiles, called learning orientations, which describe fundamental individual learning differences that should be taken into account when designing e-learning environments.
<table>
<thead>
<tr>
<th>Orientation</th>
<th>Conative/affective factors</th>
<th>Strategic planning and committed learning effort</th>
<th>Learning autonomy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transforming learner</td>
<td>Focus strong passions and intentions on learning. Be an assertive, expert, highly self-motivated learner. Use holistic thinking and exploratory learning to transform using high, personal standards.</td>
<td>Set and accomplish personal short and long term challenging goals that may or may not align with goals set by others; maximise effort to innovate and reach personal goals. Commit great effort to discover, elaborate and build new knowledge and meaning.</td>
<td>Assume learning responsibility and self-manage goals, learning, progress and outcomes. Experience frustration if restricted or given little learning autonomy.</td>
</tr>
<tr>
<td>Performing learner</td>
<td>Focus emotions/intentions on learning selectively or situationally. Be a self-motivated, focused learner when the content appeals. Meet above-average group standards only when the benefit appeals.</td>
<td>Set and achieve short-term, task-oriented goals that meet average-to-high standards; situationally minimise efforts and standards to reach assigned or negotiated standards. Selectively commit measured, detailed effort to assimilate and use relevant knowledge and meaning.</td>
<td>May situationally assume learning responsibility in areas of interest but willingly give up control in areas of less interest. Prefer coaching and interaction for achieving goals.</td>
</tr>
<tr>
<td>Confirming learner</td>
<td>Focus intentions and emotions cautiously and routinely as directed. Be a low-risk, modestly effective, extrinsically motivated learner. Use learning to conform to easily achieved group standards.</td>
<td>Follow and try to accomplish simple task-oriented goals assigned and guided by others, then try to please and conform; maximise efforts in supportive environments with safe standards. Commit careful, measured effort to accept and reproduce knowledge to meet external requirements.</td>
<td>Assume little responsibility, manage learning as little as possible, be compliant, want continual guidance and expect reinforcement for achieving short-term goals.</td>
</tr>
<tr>
<td>Resistant learner</td>
<td>Focus on not cooperating. Be an actively or passively resistant learner. Avoid using learning to achieve academic goals assigned by others.</td>
<td>Consider lower standards, fewer academic goals, conflicting personal goals, or no goals; maximise efforts to resist assigned or expected goals either assertively or passively. Chronically avoid learning (apathetic, frustrated, discouraged, or disobedient).</td>
<td>Assume responsibility for not meeting goals set by others, and set by others and set personal goals that avoid meeting formal learning requirements or expectations.</td>
</tr>
</tbody>
</table>

Situational performance or resistance: learners may situationally improve, perform or resist in reaction to positive or negative learning conditions or situations.

Source: Martinez (1999)
As an attempt to capture human learning that goes beyond conventional constructs of cognitive ability, learning orientations represent how individuals (aggregated by beliefs, emotions, intentions and ability) plan and set goals, intentionally commit and expend effort and then experience learning to attain short or long term goals. In other words, they describe individual’s proclivity to take control, set goals, attain standards, manage resources, solve problems and take risks to learn. Martinez’s (1999) and Martinez and Bunderson’s (2000) findings revealed four types of learning orientations that reflect a whole-person perspective of learning differences, namely the transforming, the performing, the conforming and the resistant learner. Table 4 summarises the description of these four learners based on their beliefs, values, emotions and intentions to self-motivate themselves to learn (i.e. conative and affective factors), to contribute efforts (i.e. strategic planning and committed effort factor) and to self-manage learning (i.e. learning autonomy factor). However, it should be stressed that learners usually fall along a continuum of learning orientations. Learners can also move downwards or upwards in response to negative or positive responses, conditions, resources, results and experiences.

By identifying the unique sources for learning differences from a whole person perspective, the learning orientations provide useful guidelines for differentiating learners. In fact, a learner’s analysis should become an integral and initial part of the entire instructional design process, which in turn is used for matching a more personalised solution to individual differences. This is because in designing e-learning models with only one type of learner in mind (all with similar emotions and intentions) we unintentionally set learners up for frustration and possible failure. This is the major reason that the success and effectiveness of online collaborative and constructivism e-learning models that assumed high learner’s self-motivation and self-regulatory processes is ambiguous. According to the learning orientations, such learning environments are effective only for the transforming learners.

On the contrary, effective e-learning instruction should provide multiple ways to provide instruction and environments so that all learners will want to learn on the Web and continue to have opportunities for success. Thus, the identification of individual learning differences should be used in planning instruction, promoting interactivity, capturing interests, designing interfaces and environments, delivering instruction, practice, feedback and assessment, helping learners monitor progress, evaluating performance and making revisions. In this way, the benefits of personalised learning to individual differences would be able to address important human issues previously managed by instructors in the classroom (e.g. lack of confidence, impatience, mistakes, boredom). Martinez and Bunderson (2000) provided an example of how instructional strategies can be matched to three learning orientations (Table 5).
Table 5. Instructional strategies for three learning orientations

<table>
<thead>
<tr>
<th></th>
<th>Transforming learners</th>
<th>Performing learners</th>
<th>Conforming learners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content structuring</td>
<td>Prefer freedom to construct own content structure</td>
<td>Prefer a general instruction, limited ability to reorganise</td>
<td>Prefer to let others decide content structure</td>
</tr>
<tr>
<td>Sequencing methods</td>
<td>Hypertext, sorting by metatags, precise access</td>
<td>Semi-linear, logical branching, access by subtopic</td>
<td>Linear, page turner representations general access</td>
</tr>
<tr>
<td>Peer interactions</td>
<td>High, belief that everyone can commit and contribute valuable, holistic insights</td>
<td>Moderate, easily frustrated by time required for peer interaction and theory</td>
<td>Minimal, values group consensus and commitment, wants answers from the instructor</td>
</tr>
</tbody>
</table>

*Source: Martinez and Bunderson (2000)*

It is made evident from Table 5 that the purpose of personalised e-learning models is not to make previous theories on collaborative and constructivism redundant but rather to emphasise that their successful implementation and effectiveness requires a fit between the design of the instructions used and the learners’ differences identified from a whole-person rather than a cognitive perspective. By this way, problems related with student participation and engagement in online discussions (e.g. lack of interest and/or capabilities) can be overcome, while the role of instructors goes beyond solely moderating discussions to identifying learners’ learning differences and abilities in order to match instructions to their profiles. In other words, educators should seek to accommodate the needs and wants of individual learners and design a multiple and equalitarian e-learning platform that would enhance and support the contribution of different learners.

**2.4 A framework of the evolution of e-learning models and pedagogy**

Figure 2 illustrates the evolution of e-learning pedagogy by mapping e-learning models into two dimensions: a) the evolving and changing role of the instructor in designing e-learning environments (vertical axis); and b) the increasingly dynamic role of learners in determining the design of learning environments (horizontal axis). Three eras of e-learning models are identified: 1) the automational era reflecting the exploitation of Internet tools for automating and digitising existing practices; 2) the mass learning era whereby learners are required to be highly self-motivated and self-controlled in order to become active members of learning communities; and 3) the mass customisation era of e-learning models whereby learning environments are matched to individual learner’s differences.
E-learning pedagogy starts from the model whereby instructors simply transfer and re-implement their existing practices on the Internet. In this vein, e-learning models are instructor-oriented and determined while students are viewed as passive receivers of canned, pre-packaged knowledge.

The second wave of e-learning models incorporates instructions reflecting attempts to create learner-centred virtual classrooms whereby knowledge and learning is built through students-students and students-instructors interactions. In this case, instruction is based on collaborative and constructivism theories that support cognitive processes (i.e. how learners process, build and store knowledge). Depending on the level of collaboration that instructors’ actions and moderating roles trigger, three virtual classrooms are identified according to Campos et al (2001).

However, an emerging wave of e-learning models highlights the need to design e-learning environments that address learning processes beyond cognitive factors and match instructions to learners’ differences and abilities identified from a whole-person perspective. Specifically, higher psychological influences (conative and affecting factors) on learning should also be used for conducting a learners’ analysis which in turn should be used in matching individual learning differences to instructions. The development of personalised and adaptive e-learning models reflects the increasing power of learners to determine the design of e-learning environments, which is compatible with recent trends regarding the mass customisation, one-to-one or personalised development and provision of products and services.

Higher order e-learning models more fully exploit the interactive and network capabilities of Internet tools in order to enhance and advance online teaching and learning. First era models use the Internet as a publishing and dissemination medium, while Internet’s networking and interactive capabilities are being exploited by collaborative and constructivist
instructions to develop virtual e-learning classrooms. However, Mason (1998) argued that such e-learning models just re-discover and adapt instructions that have for long been implemented in traditional classrooms. E-learning models in the third era go a step further to exploit Internet capabilities to efficient and effectively customise and personalise instruction to a large number of learners, something that is not very economical in traditional instruction. In fact, the Internet offers the perfect technology and environment for personalised learning where learners can be uniquely identified, content can be specifically presented and progress can be individually monitored, supported and assessed.

As higher order models reflect an increasing role of learners in designing learning environments, they also promise greater learner commitment and engagement, assure higher learning effectiveness and more accurately predict the development of higher order skills and competencies. Moreover, the emergence of the mass customisation era of e-learning models does not indicate the redundancy and ignorance of the benefits and advantages of previous e-learning models. On contrary, personalised e-learning models highlight the need to match instruction to whole-person learning differences if learning benefits are to be materialised. In this respect, learning and teaching benefits of previous e-learning models are enhanced and guaranteed when their instruction is personally designed. In other words, benefits of e-learning models in the different eras can be cumulative and not exclusive. Within the context of tourism and hospitality education, the teaching and learning benefits of designing personalised e-learning models that aim at fostering and materialising the benefits of collaborative and constructivism best practices are analysed below.

3. Benefits of personalised e-learning models for tourism and hospitality education

The webification of instruction creates a learning environment that overcomes time (365x7x24 hours) and space (any place, any platform-Internet enabled device) barriers. Thus, the Internet offers great flexibility to match the specific conditions of work within the tourism and hospitality sector. So, as an increasingly amount of tourism and hospitality students simultaneously seek part time experience, e-learning enables flexibility in terms of the time and place delivery of instructions. Tutors can also use e-learning models in order to enhance and support students instruction while they are in placement, while e-learning can also address the needs of continuous professional development enabling those that are already in the industry to engage in life long learning while being at the work-place.

However, a simple digitisation of existing instructor-oriented practices does not lead to enhanced benefits. On the contrary, teaching and learning benefits of e-learning environments significantly enhance when collaborative and constructivism theories are applied aiming at the exploitation of Internet tools for the development of student-centred 24 hours virtual classroom. In this case, learning is fostered not as a simple memorisation of canned knowledge but as an inherently diverse, collaborative and social process. Indeed, the intellectual synergy of many minds, experiences and knowledge, benefit learners from: active and constructive learning, deep processing of information, improved individual achievement, (Brown and Palinscar, 1989; Abrami and Bures, 1996); increased store of knowledge, improved communication and listening skills (Dickinson, 1992; Hudspeth, 1992); the development of social attitudes and a collaborative spirit, motivation to learn, critical thinking, diversity of ideas and students’ long term retention (Flynn, 1992; Schlechter, 1990). Bernard et al (2000) and Harasim (2000) also argued that online collaborative e-learning has the potential to overcome some of the problems related to the distant student’s out-of-
campus situation, for example: isolation felt by the learner; high average rates of dropout; difficulties related to the formation of and entrance into the peer group of fellow students; low quality of learning attainment, such as the attainment of complex conceptual relationships and their associated skills; fear related to engagement in academic discourse; the time and place constraints for students depending on company-employment; and the trouble of building a shared understanding amongst students multiple backgrounds and located in multiple cultures. Others (e.g. Abrami and Bures, 1996; Harasim, 2000) added that the reflective use of e-learning will aid in the acquisition of complex and higher level concepts and skills that have been claimed as weakness of traditional distance learning.

The acquisition of social, multicultural and communication skills are regarded as crucially important for tourism and hospitality graduates. In particular, Cho and Schmelzer (2000) argued that e-learning help learners to acclimatize themselves to the technological changes occurring in the tourism workplace as well as allow them to experience multicultural diversity and teamwork by interacting with people of different social and cultural background via the Internet. This experience can improve their managerial skills for the tourism and hospitality workplace, which is usually comprised of people from different cultural, racial, socioeconomic and educational backgrounds and so learn, think and behave differently. Moreover, the increased application of e-business, e-commerce and strategic alliances between tourism businesses also requires managers to be competent to communicate via technology with their peers, customers and employees who may function in different organizational cultures and settings (Cho and Schmelzer, 2000). Thus, e-learning can be an effective means of preparing students for the workplace, which increasingly requires a knowledgeable workforce that can work collaboratively irrespective of their spatial, time and cultural differences.

E-learning provides great opportunities to become component and familiar with the use of Internet. As, technological developments propel constant change in the tourism and hospitality industry, graduates that are technology competent and knowledgeable to effectively and innovatively develop and adapt technological advances in business strategies and processes are highly required. Moreover, since more and more tourism and hospitality companies are adapting online training and Intranets for knowledge management activities, e-learning is argued to familiarise learners and make them more competent in such environments by developing their information literacy and knowledge management skills.

However, the benefits of collaborative e-learning models cannot be materialised when instructions fit the learning abilities and differences of an average learner. However, although online learners need to want and intend to become more self-supporting, self-directing and independent of the instructor learners, many learners are ill-equipped to handle online learning environments. Recognising the online learning ability gap and providing solutions that consider the whole person perspective is a step in helping learner transition to more successful, self-directed online learning. Thus, especially important is to identify what affects learners to want and intend to improve performance and negotiate constant improvement and change, independently, passionately and productively. This becomes more crucially important considering the diverse profile and needs of learners entering the tourism and hospitality education, e.g. high school leavers, people with industry experience, industry professionals.

Personalised e-learning models stress the importance to match instruction to personal differences, in order to help learners become more sophisticated, self-motivated and self-directed learners. This is vital important nowadays in the knowledge era whereby the scarce resource is not information but rather its application. Ideally, a personalised e-learning
model would enable every learner to learn how to develop certain types of knowledgeability (combinations of skills and knowledge) as a basis for securing their employability in the knowledge era. Such types of combinations would be: a) relating theoretical and practical modes of learning to one another to enable connections to be made between workplace and formal learning; b) learning how to use information and communication technologies as a resource for communicating with others in learning communities to produce new knowledge; and c) developing a transformative rather than an informative relationship with the world. In other words, not relying on existing paradigms to interpret problematic situations but learning how to mediate and debate ideas or concepts which might form the basis of new ways of addressing the evolving range of economic, technological and social changes.

4. Conclusions

It was the aim of this paper to develop a framework for the development of effective e-learning strategies for tourism and hospitality education. To that end, the evolution of e-learning pedagogy and the theoretical underpinnings of different e-learning models were reviewed and analysed. E-learning models were mapped into a framework that identified three eras of e-learning models. The first implication of this framework is that educators should immigrate from e-learning models that simply re-implement existing practices by webifying them. As e-learning is redefining how skills and knowledge are acquired, educators need to re-examine how online learning is occurred and how online instruction can be facilitated. Educators thus need to immigrate to higher order e-learning models that more fully exploit Internet's capabilities and tools to advance online teaching and learning. Student-centred (collaborative and constructivism) and student-determined (personalised) online learning environments are two steps towards this direction.

Moreover, as it was made evident that teaching and learning benefits from different e-learning models can have cumulative effects, it was advocated that e-learning models should aim at the personalisation of online instructions that simultaneously aim at exploiting the benefits of collaborative and constructivism practices. Finally, the benefits of this proposed e-learning model for tourism and hospitality education were identified and analysed. Specifically, it was illustrated that changes in technological advances and in learners’ characteristics as well as trends and issues in the tourism and hospitality industry as well as in the society as a whole reinforce the need to seek and support the development of skills, competencies and knowledge (i.e. the knowledgeability) that collaborative and personalised e-learning environments enable. However, further research identifying how such models can be implemented and how the shift from current educational paradigms can be achieved is required.

References


Bunderson, C.V. and Dunham, J.L. (1970), Research program on cognitive abilities and learning, Final report, Advanced Research Projects Agency Contract N00014, Computer Assisted Instruction Laboratory, The University of Texas at Austin


Dobing, B. (1995), Using the Internet to stimulate virtual organizations in MBA curricula. *Proceedings of the first Americans conference on information systems*, Pittsburgh, PA


McConell D., Hardy V. and Hodgson M., (1996), Groupwork in educational computer conferences, ESRC end of award report, University of Lancaster


Sigala, M. (2001b) Measuring students’ variables for developing e-learning platforms, First National Greek Conference on Open and Distance Education, Greek Open University, Patras, Greece, 24-27 May


Valcke, M (1999), Educational re-design of courses to support large groups of university students by building upon the potential of ICT. In D’ Hollander, E., Kerre, E., Vanwormhoudt, M., Vervenne, D. and Vandamme, F., (eds) *Information Technology for teaching and training, Communication & Cognition*, (Ghent: Ghent University)


Web-based education and training for tourism: the promising option

Željko Panian1, University of Zagreb

Abstract

Web-based education marshals web technologies to the task of education and training. It implies the confluence of three social and technical developments: distance learning, computer-conveyed education, and Internet technologies. It draws on technologies, traditions, and techniques of all three areas and, at the same time, can learn from the successes and failures of all three.

Since tourism is a global business, and the Internet as well as the web are global resources, they have much in common. This is the reason why it seems pretty logical to direct education and training for tourism towards web-based educational applications and systems.

The paper discusses some of the most important aspects of web-based education and training systems for tourism, among which particularly: heritage and history of web-based education and training in general, the appeal of the just-in-time characteristic, the advantages and disadvantages of web-based education and training systems design, and the selection of courses and educational modalities.

1 Željko Panian, Ph.D., J. F. Kennedy Sq. 6, 10000 Zagreb, Croatia, phone: ++385 238 3214, fax: ++385 233 5633 e-mail: zpanian@efzg.hr
INTRODUCTION

Web-based education, as a major sub-component of the broader term “e-learning”, is one of the tools with which contemporary education is delivered. It took roots about a decade ago, when one of the most popular standard Internet services emerged – the World Wide Web service.

In traditional academic institutions, web-based education (learning) systems are generally housed administratively in a “distance education” department alongside other at-distance education delivery methods such as correspondence, two-way videoconferencing, videotape and CD-ROM or DVD delivery systems. All such systems seek to serve learners at some distance from their learning facilitator. Many such systems attempt to serve learners interacting with the learning source at different chronological times (e.g., e-mail).

Distance Education, then, is often referred to those delivery modalities that seek to reduce the barriers of time and space to learning, thus the frequently used phrase anytime, anywhere learning.

The web-based education market is nowadays a fast-growing market. According to International Data Corporation (Goodridge, 2001), the corporate e-learning market generated nearly $2.3 billion in 2000, and is on track for a growth rate of more than 50 percent, which will allow it to reach $23 billion by 2004. The most significant change on the web-based education market is related to the shift from IT (Information Technology) skills training toward non-IT or business web-based education. It opens up many new markets, among which the web-based education and training for tourism market is one of the most promising options.

Furthermore, live web-based education represents a fledging segment of the distance learning market, one that is expected to grow more rapidly than asynchronous e-learning. Live web-based education technology and training providers generated more than $125 million in annual revenues in 2000, and these revenues are expected to continue growing at approximately 50 percent per year, reaching $750 million of annual revenues by 2005, according to a white paper from Eduventures (2001).

The attraction and usefulness of web-based learning is observable from Figure 1, presenting the growth in U.S. e-educational markets.
MAJOR CHARACTERISTICS OF WEB-BASED EDUCATION

Web-based education marshals web technologies (hypermedia) to the task of education and training. Several definitions of web-based education are common. Some people hold that it is limited to what takes place entirely within a web browser without the need for other software or learning resources. Such a pure definition, though, leaves out many of the truly effective uses of web technologies for learning.

Thus, we suggest a broader definition, according to which web-based education is any purposeful, considered application of web technologies for the task of educating and training a human being.

In the definition presented, two adjectives – purposeful and considered – emphasize the fact that web-based education and/or training are not just a web site thrown together without thought for learning. On other hand, terms educating and training are used together and equally, since the activities they refer to converge in the Internet environment. Web-based training is the term that is used more often to describe the use of web technologies for learning within industry, while the terms web-based education and web-based instruction are more common in the academic community.

Derived from the principal features of the Internet and the World Wide Web service, major characteristics of web-based education, according to Amor (2001), are as follows:

- interactivity
- global reach
- the multilingual and multi-cultural approach
- the nearly 100 percent availability

Source: Goodridge, 2001

![Diagram](Image)
Interactivity means that the learner and the learning facilitator (educator or trainer, human or automated) can exchange information in a real time mode. The Internet is globally accessible, so that the reach of web-based education is global, too. Some efforts can and should be made to make educational web site multilingual, and the web site itself can and should be personalized, which implies its multi-cultural feature. Finally, web sites generally, and in the web-based applications particularly, are available for use on a 24/7 (24 hours a day, 7 days a week) or all-around-the-clock basis.

HERITAGE AND HISTORY OF WEB-BASED EDUCATION

Web-based education is the confluence of three social and technical developments: distance learning, computer-conveyed education, and Internet technologies. It draws on technologies, traditions, methods, and techniques from all three areas. Also, it can learn from successes and mistakes of all three.

Distance Learning

Distance learning has its roots in written communication, i.e. correspondence education that developed during the mid 1800s (Moore and Kearsley, 1996). By 1840, Sir Isaac Pitman was teaching his shorthand system by mail. About that time, Scottish educator James Stewart of Cambridge University began offering off-campus lectures. The Correspondence University was founded in Ithaca, New York, in 1883, and in the 1890s, the International Correspondence Schools grew out of home-study courses in mine safety developed the decade before by Thomas J. Foster.

Today, distance education is a large, multi-faceted endeavor. For example, the US Public Broadcasting Service (PBS) transmits courses to more than two thousand institutions. The US Army’s Logistics Management College in Fort Lee, Virginia, conducts video and audio training at over 70 remote locations. The Open University in the UK teaches most of its 200,000 learners by distance education methods.

Distance education has readily adopted new technologies to reach wider audiences and teach more effectively. In 1925, radio courses were first delivered by the State University of Iowa, and in the 1940s, educational television added capabilities to broadcast live presentation to remote learners. In the 1980s, teleconferencing allowed teachers and learners to talk to each other, even though distances and political boundaries separated them. In the 1980s and 1990s, satellite television let learners see and interact with instructors a world away. Web-based is, hence, just the latest technology to advance distance learning.

Computer-conveyed Education

Several forms of computer-conveyed education preceded web-based education. These forms all use computer systems to store and deliver educational matters. They take various names, the most common being Computer-Assisted Instruction (CAI), Computer-Based Education (CBE), and Computer-Based-Training (CBT).

The roots of computer-conveyed education go back before anyone thought of using computers to teach. During World War II, the US military forces had to train large numbers of citizens to operate sophisticated weapons and other military equipment. Trainers experimented with many techniques, from comics to cartoons and Hollywood-style films. They
discovered that audiovisual materials were effective, not just as aids to paper and classroom training, but also as the core method of education.

The first real breakthrough occurred in the 1960s when the University of Illinois planned, and Control Data Corporation developed, the computer-based educational system PLATO. PLATO stands for Programmed Logic for Automatic Teaching Operations, and it allowed the sophisticated branching necessary for teaching complex subjects. By 1985, over a hundred PLATO systems were in service and learners had logged about 40 million hours of instruction.

In the last decade of the 20th century Microsoft Windows operating systems provided a standard platform on which programmers could develop educational and training programs. Applications were becoming available for these platforms that let even non-programmers develop such programs. Since then, we have seen a steady development and refinement of technologies for delivering education and training on personal computers, including simpler programming, multimedia and courseware authoring tools, as well as CD-ROMs and DVDs.

Each advance made learning easier and less expensive to develop and deliver. Yet this training was limited to single computer systems. The next development was to erase that limitation and open the way to true web-based education.

**Web Technologies**

Many of the technologies essential to web-based education actually predate the World Wide Web. Some go back to the invention of the Internet or even before. But, once such a global network was developed a true metamorphosis began. After the invention of Hyper-Text Markup Language (HTML), universities and private companies started to create programs called browsers to display HTML documents on the user computer screen.

In a sense, web-based education began the first time someone read web pages and learned something. But, the actual beginning of web-based education was when people started intentionally putting tutorials and other educational materials on the web, with the hope that somebody would read them and learn from them. Nowadays, educational materials are designed specifically to be delivered through the web and used on remote user locations.

The evolution of the web-based education concept is shown in Figure 2.
**APPEAL OF JUST-IN-TIME CHARACTERISTIC**

It seems that web-based education is part of the biggest change in the way humans conduct educational processes since the invention of the chalkboard. The development of computers and digital communications media has removed the barriers of space and time. In the Internet, there are no Newton-type space and time dimensions – everything is “here and now” on the Internet terminal screen. Thus we can obtain and deliver knowledge anytime anywhere.

As Nobel prize Laureate Herbert Simon (1971) anticipated, to know “now means the process of having access to information and knowing how to use it”. Hence, Simon predicted the problem of the so-called digital divide, which is now obvious and is being widely discussed.

Web-based education does not change how a person learns, but it does change how he or she can be taught. People learn with these new systems pretty much as they have for thousands of years. But what has changed is the economics and capabilities of presenting and delivering knowledge. Many of the reasons for implementing web-based education systems do not come from the characteristics of this form of education itself, but from the exploding demand for training.

A lack of properly educated workers restrains corporate growth and profits. The International Technology Training Association (ITTA), for example, estimates that in 2000 there were 350,000 unfilled positions for programmers, computer scientists, and systems analysts in the U.S. (Kolbasuk McGee and Mateyaschuk, 2001).
Management is not alone in recognizing the urgent need for education. Workers clearly seek more training, often at their own expense. For example, a survey conducted by the Gallup Institute of 1,012 U.S. workers in May and June 2001 found that 99 percent of workers felt they needed additional education and training (Schaaf, 2001).

However, most workers prefer to learn on the job. That same Gallup survey revealed workers strongly preferred informal on-the-job training and self-paced learning to formal classroom education. Faced with new ways of doing their jobs, e.g. in the e-business environment, they want their knowledge to be enriched and updated permanently. Tourism is quickly adopting technology innovations, like the Internet and computerized reservation systems, prompting the need for the training of workers involved in this business.

Web-based education can be organized in a way that assures delivering knowledge just-in-time, i.e. when the need for additional learning and training occurs. With a self-directed web-based education system, learners do not have to wait for the group or class to form and they can proceed at their own pace. This is exactly what makes it particularly attractive for both working people and students.

THE PROs & CONs OF WEB-BASED EDUCATION

As every other (educational) concept, web-based education and training has many advantages, but some disadvantages, too. The first major design decision is whether to use this concept at all. Before commitment to web-based education and training technologies, its potential and requirements should be weighed to determine whether it offers the best solutions needed.

Advantages of Web-Based Education and Training Concept

Although web-based education is a relatively new phenomenon, it has already demonstrated some distinct advantages over traditional classroom education and over standalone computer-based training. More precisely, web-based education has all the advantages of standalone computer-based training, such as constant availability, non-judgmental testing, and instant feedback. But it does have some additional advantages of its own:

- access to web-based resources
- centralized storage and maintenance
- collaboration mechanisms

Web-based education combines the collaboration of face-to-face training and anywhere-anytime availability. And, to be realistic, the web-based education concept is just in its infancy. Everyone agrees it is going to get better and better.

But, the fuel that is ultimately accelerating the adoption of web-based education systems is money. Potential cost savings have energized corporations and educational institutions to begin using them as soon as possible. According to Hall (1999), technology-conveyed education is typically 40 to 60 percent less expensive than training delivered by traditional means.

Web-based education saves money by reducing some of the largest costs for training. The most important among them are:

- fixed cost per learner
- travel expenses
- costs of facilities and supplies
• administrative costs
• salaries
• lost opportunity costs

Since the number of learners in web-based education is virtually unconstrained, the fixed cost per learner (the cost of courses and educational materials preparation, etc.) tends, theoretically, to zero. In practice, this means that fixed cost per learner is significantly reduced.

Travel expenses amount to 40 percent of the cost of corporate training, according to Becker (1999). The web-based education concept almost excludes travel expenses.

Web-based education reduces costs for training facilities. Because the learners take the class from their homes or offices, the need for classrooms, furniture, tutorials, references, and other educational supplies is reduced or even eliminated.

Some web-based education systems can perform – or at least simplify – many time-consuming administrative chores, such as:
• distributing course catalogs and syllabuses
• registering learners
• distributing course materials and handouts
• recording grades and “attendance”
• producing working reports

Educators and learners spend the same time on courses, but the time spent traveling to school definitely will be less. Their salaries do not have to cover this time.

Almost no cost comparison considers lost-opportunity costs, the costs incurred or revenues not generated because someone is in training and not on the job. As the total time spent on education is lessened, lost-opportunity costs are reduced.

Furthermore, web-based education and training enables better teaching techniques. Some important improvements in this sense are:
• stronger learner activation and initiative
• learners are exposed to real-world data
• learners gain a more in-depth learning experience
• developing better thinking skills
• online group discussions
• collaborative learning promotion
• effective learning techniques
• identification of new knowledge sources

Cost savings are common to all web-based education systems, but the advantages listed above depend on the subject being taught. In the case of education and training for tourism, this means the following:
• Learners are exposed to new challenges. To progress in the course, they must actively navigate the course. They may be invited to select which lessons to take and in what sequence. Activities and practice sessions alternate with presentations. There are a lot of documentary materials on the web concerning subjects relevant to tourism. Some of them are prepared in advance (presentations, films, videos, virtual museums, online accessible documents, etc.) and many are even delivered in real time.
• Similarly, learners can access online various real-world data, either individual or statistical. They can visit the web sites of travel destinations, cities, sport and cultural events, hotels, restaurants, camps, harbors and marinas, air transporters and shipping companies, airports and railway stations, theatres, local and government agencies, etc., which often offer valuable real-world data.

• Learners can investigate certain topics in-depth by browsing the web, compare information from different sources, read other people’s opinions and experiences, watch certain happenings, participate in user group discussions and at teleconferencing events, develop online questionnaires, request information from relevant institutions or individuals, evaluate tourist offers, trace some processes in certain time intervals, etc.

• It is argued (Baron and Goldman, 1994) that learners who use web technologies to discuss issues, research questions, and solve problems improve their critical reasoning, problem solving abilities and creativity. In writing classes, learners can ask more substantive questions and comment more constructively on the writing of peers. Learners can express their reasoning more clearly and make specific suggestions for improvement.

• It is estimated (IDC, 2001) that at any moment there are about 70,000 active UseNet discussion groups on the Internet. At least a few thousands of them are oriented towards issues that may be helpful to learners of different courses in tourism. Everybody can join an unlimited number of these discussion groups or subscribe to particular mailing lists, exchanging information with people that are known or unknown. These Internet services can be viewed and used as immense sources of new knowledge and experience for the learners.

• Web technology promotes collaborative learning. Learners can – and usually do – form their own, rather closed discussion groups and mailing lists to discuss, debate, and brainstorm with colleagues throughout the university or the company, across the country, or around the globe.

• Web-based education implies the use of several new technologies, like multimedia, streaming, computer simulation/animation, or mobile Internet access. Many recent studies indicate that learning technology can improve learning. For example, one half of universities and colleges surveyed by CCA Consulting (CCA Consulting, 2001) rated the effectiveness of learning technology “high” or “very high” in improving interaction among students and instructors, and boosting the self-esteem of students. Since this survey included some universities and colleges at which tourism is taught, there is no reason to doubt whether new technologies can contribute to the improvement of education and training for tourism.

• An important part of learning and studying is identifying resources that can answer questions now and in the future. Libraries are such sources. Online library access and search helps learners identify valuable sources of knowledge. These sources can be bookmarked or stored in the user’s (learner’s) computer memory, where they are never more than a couple of mouse clicks away. As the definition of learning shifts from memorizing facts to gaining the ability to solve problems, such resources become an essential part of learning.
But, there is, of course, the other side of the coin – web-based education shows some disadvantages, too.

**Disadvantages of Web-Based Education and Training**

Web-based education is not all advantages and benefits. It creates costs, requires compromises, and poses certain risks. Most of these drawbacks can be overcome with good design, but it is reasonable to analyze, discuss, and try to understand them.

Maybe the most important negatives of web-based education are as follows:

- It requires more work.
- Learners fear losing human contact.
- Technical requirements are often difficult to meet.
- It disrupts established ways that work.

**Web-Based Education Requires More Work**

Mahone Brown (1998) states that “many educators report that electronic delivery of knowledge requires 40 to 50 percent more effort on their part than traditional education”. Students, lacking face-to-face contact, demand more attention and feedback from instructors. Iadevaia argues (1999) that some educators felt they had become, in fact, private tutors.

Converting existing classroom courses to web-based instructions has proven harder than many designers expected. For example, the faculty of Florida’s Nova Southeastern University found that converting six undergraduate business courses to web-based education system took them about twice the time they expected (Whitney Gibson and Herrera, 1998).

But, complaints from educators about a higher workload diminish as they gain experience. L. Harasim (1999) observes that by the third course, the workload may be no more than a conventional course.

On the other hand, Kroder, Suess and Sachs (1998) warn that learners often report web-based courses take them 20 to 40 percent more time and effort than traditional classroom courses. Online discussion, brainstorming sessions, and problem-solving activities usually take longer than their face-to-face counterparts. Lacking the feedback of non-verbal expressions, body language and tone of voice, participants in online communications must spend more time correcting misinterpretation and clarifying ambiguities. As a result, learners spend less time on the matter of the discussion.

It can be concluded that, to benefit from technology, learners must use it. However, if learners feel that the benefits of the technology are not worth the extra effort and time required mastering it, they resist using the technology.

**Learners Fear Losing Human Contact**

A common belief, or, better to say, a prejudice, exists that web-based education suffers from a lack of contact between humans. Though these fears seem exaggerated, they can become reality if learners refuse to take e-learning courses or do not commit themselves to them.

If the web is used merely to broadcast learning materials, suggests Bostock (1997), human contact is lost, students are isolated, and the educational experience is passive, limited,
and alienating. Many instructional designers fear that learners, lacking face-to-face contact with the instructor and fellow learners, may fail to develop required social skills.

It is interesting that such suspicions are not borne out by decades of self-paced distance learning delivered by mail, CDs or video. We think there is no particular reason to stress them strongly when web-based education is in question.

The “isolation problem” of the use of web-based education systems can be solved by adding to the system some features that support closer relationships between learners and instructors, as well as among learners in a group. These features include:

- Phone or Internet chat support.
- Encouraging learners to communicate and help each other via e-mail.
- Setting up regular UseNet discussion groups.
- Including collaborative activities.
- Providing access to an education facilitator at any time.
- Publishing a schedule with deadlines.

These features and some additional pedagogical tips can make the lack of face-to-face contacts in the web-based education environment less significant and severe.

**Technical Requirements Are Difficult to Meet**

Some of the most formidable barriers to web-based education are technical. Many learners never get started because they do not know how to start, i.e. do not have the technical skills to enable them to find interesting educational content. Even when they do get started, technical incompetence is the reason for their later stressful and frustrating experience.

Even minor technical glitches can balk learning and interrupt progress. For example, long download times, occasional web page unavailability, and similar problems can discourage the learner and compromise even the best web-based education systems. It is particularly dangerous in education and training for tourism, where rich presentation forms, which slow down the interaction with a web site, are rather frequent because of promotional and other commercial reasons. A complex course may rely on multiple servers for uploading and downloading files, or sending e-mail messages. Not all of them may be working all the time, so that the rule 24/7 is rather rarely implemented in reality.

Having to deal with unfamiliar and not entirely reliable technology, concludes Driscoll (1998), may subject learners to additional stress and distractions. As a result, they spend less time on the subject matter of the course.

**Web-Based Education Disrupts Established Ways that Work**

Classroom education has low technology but very refined techniques. The procedures of classroom education and training are thoroughly understood and effectively used. Lectures go back thousands of years, and textbooks have been around for centuries. Despite many drawbacks, classroom education simply – works.

On the other hand, web-based education is new, strange and different. To use such systems effectively, one must replace processes and techniques that have served the entire Civilization. Nostalgia, paranoia, and genuine skepticism confront web-based attractiveness and usefulness.
Because web-based education uses new technologies, employs new strategies, and foregoes many established communication channels, it may face resistance from those who must adopt new roles and responsibilities to support it. Many educators hesitate to use new educational systems since they think their importance will be lessened. Teachers who learn to write on a blackboard while facing the students have acquired a skill they can use for the rest of their career. In contrast, the teacher who has learned to use a new software package has acquired a skill that will surely soon be obsolete.

But this is, concurrently, the tragedy and the spell of web-based education.

**SELECTION OF COURSES AND EDUCATIONAL MODALITIES**

With web technologies, several different kinds of courses can be created, each providing learners with a distinctive type of learning experience and each suited to different situations. Some courses are led by an educator who charts the path and sets the pace for a group of learners. In other cases, learners find their own way, set their own priorities, and interact only with the computer.

The major alternatives are:
- educator-led or learner-led courses
- synchronous or asynchronous courses

Let us discuss them briefly.

**Educator-Led and Learner-Led Courses**

One of the first and most important decisions when designing a web-based education system relates to the role (or lack of role) of an educator. It is important to state: *web-based education does not eliminate the value of an educator.*

The web-based education concept gives a choice as to who leads: the teacher or individual learners. This choice is, however, not limited to pure educator-led or pure learner-led forms, but includes a spectrum of possibilities in between these two extremes. In education and training for tourism, some of these ‘mixed’ options seem to be the most appropriate.

Let us consider three characteristic examples:

- When teaching analysis and planning in tourism, a model very close to the pure lecturer-led course would be used, since there are many theoretical things to be explained.

- When teaching geography for tourism, the educator will explain the most important facts and impacts of geographical factors on the behavior of tourists, and then let learners search the web and examine the practical cases that have been found. This is a kind of ‘mixed’ course model.

- When teaching demographics, the educator can leave the initiative almost entirely to learners, directing them and answering the questions they raise. This is possible, while in the Internet a myriad of web sites offering demographic analyses and statistics can be found.
**Synchronous and Asynchronous Courses**

One of the most important design decisions is whether to make web-based education synchronous or asynchronous. Unfortunately, there are perhaps no two terms that cause more confusion than *synchronous* and *asynchronous*. This confusion masks an important issue related to the design of web-based education systems: Can learners control what they learn?

Strictly speaking, the term *synchronous* means that everyone involved in an educational activity must perform their part at the same time. Such events are sometimes called *real-time* or *live events*. In education for tourism, this type of course will be appropriate when teaching, for example, sales and customer services, front office procedures, event and conference management, recreation activities, role playing, etc.

*Asynchronous* activities are ones that participants can experience whenever they want. Permanently posted web pages and automatically scored tests are clearly asynchronous, since learners can read them anytime they want. This kind of course will be appropriate when teaching, for example, geography, history, sociology, psychology, marketing, booking activities and using airline computerized reservation systems, analysis and planning, tourist agencies’ and tour-operator’s functions and performance evaluation, management, etc. – all of these applied to tourism.

**CONCLUSION**

Web-based education is a new concept of distance learning. Still, there is not much experience in its potentials that can be tested in real-world implementation. But, even a brief and rather superficial analysis will show that the concept is promising in many educational areas. This is also true in the case of education and training for tourism. This paper has tried to present some evidence in favor of this thesis.

Web-based education has many advantages, but some disadvantages, too. The principle advantages are: lower costs, centralized storage and maintenance of knowledge, collaboration mechanisms, stronger learner activation and initiative, learners are exposed to real-world data, learners gain a more in-depth learning experience, developing better thinking skills, online group discussions, collaborative learning, effective learning techniques, and identification of new knowledge sources. The major disadvantages are reflected in the following facts: it requires more work to be done in the preparation of courses, learners fear losing human contact, the technical requirements are often difficult to meet, and it can often disrupt established ways that work.

One of the most important things to be done when designing a web-based education system is the appropriate selection of courses and methods of teaching. There are two decisions to be made: (1) whether to select an educator-led or learner-led model, and (2) whether to apply a synchronous or asynchronous type of learning. These decisions depend on the characteristics of the educational matters that have to be presented and adopted. It seems that many varieties of ‘mixed’ web-based education solutions are suitable to education and training for tourism.
REFERENCES


Moore, M. G. and G. Kearsley, (1996), *Distance Education: A Systems View*, (Boston: Wadsworth Publishing)


360
Teacher's digital assistant

Zvonko Kribel, TURISTICA - College of Tourism

Abstract

This article presents TDA, a small personal information system that runs on the IBM WorkPad palm computer. The system that is always with me, beside being my organizer, holds all basic data about my students. This information is crucial when I am having lessons far from home.

Some problems that have been solved are: the use of the local character code and the correct sort order; Palm OS has no support for Central Europe languages, so we used InterPilot 2.2 with Croatian Win-2.1 (Windows 1250) code table; one of the best-known data-base programs, HanDBase V2.75e, can handle up to 65000 records, so it can certainly handle all first year students for years. I have selected the Windows 98 SE operating system on the ThinkPad 390 notebook, so I may beam my students via infrared waves to the WorkPad.

An investment of US$40 for both programs and a week or two of tedious work on data conversion had one significant outcome: all student data can be seen at any time, I may update their records off-line in my car or on my office PC, and never lose anything.
1 INTRODUCTION

Teaching or lecturing undergraduate information technology courses can be frustrating, since we usually use a lot of paper documents, yet we expect our students to limit paper use. My students consider this a contradiction. The student register, exam certificates, indexes are only a fraction of the documents we daily use, read, compile and distribute. The problem gets even bigger when we have courses out of our rooms, i.e. far from home.

There are about 70 millions handheld computers, so-called personal digital assistants, or PDA, out there. IDC predicts (Kiely, 2001) about 30 millions shipments for 2002. Yet you will rarely find a PDA at school, since it seems we prefer good old paper sheets. Also the excellent work on IT for education (e.g. Adelsberger et al., 2002) does not mention PDA units more than twice.

I acquired my first US Robotics Pilot 5000 with 512 KB of RAM in December 1996. These 120 g, 120x80x18mm units are full 32 bit computers, built around 68328 Motorola 16 MHz or 33 MHz Dragonball microprocessor, with a touch-sensitive 160 by 160 pixels screen (16 or more greyscale level). You select programs by tapping icons on the screen with the included stylus. Since these computers do not have a keyboard, you insert single letters or numbers via a special (very natural, usually composed of a single stroke) Graffiti alphabet. For more detailed information on various PDA Palm models and families, I suggest reading a rather obsolete but excellent book about Palm computers (Pogue, 1999).

Recent models from Compaq, Toshiba, Casio, Hewlett Packard use up to 96 MB RAM, a colour screen, voice recording, flash ROM cards and other modules with a Microsoft Pocket PC operating system that requires heavier and more luxurious machines. Palms like Handspring, HandEra or TRG use an older, more stable Palm OS operating system and have a much larger software base. Personally, I do not believe PDAs will integrate with the wireless world of cell phones, yet some prototypes do have both features.

Our family now uses three Palm computers: one with a broken screen is waiting for better times, a 2 MB IBM WorkPad is used by our 17 years old son, and the newest IBM WorkPad with 4 MB of RAM helps me when I have courses on other locations.

Having to deal with students’ personal data, I have to consider security questions. I keep desktop data on three personal computers: Compaq Deskpro 1000 with 128 MB of RAM and Windows NT 4.0, my notebook IBM 390 with 32 MB of RAM and Windows 98, and a Compaq Presario EN series 64 MB RAM running Windows NT 4.0 at my office. I synchronise and backup all the data on both desktop PCs with a cradle, and via the infrared port (IR) to my IBM notebook computer. On my home PC I use the Lotus SmartSuite Organizer included with the IBM notebook. On the other two computers I use standard Palm Desktop 4.0 software. All these desktop programs include conduits, e.g. a piece of software responsible for HotSyncing one kind of data (Pogue, 1999, 143-144), which HotSync data to and from a PDA, see Figure 1. Figure 2 shows the size of some PDA programs.
2 SYSTEM DESIGN

This section broadly introduces the teacher's personal information system (TDA). Only the students’ lecture presence subsystem is presented in detail; the technical part of the student-lecturer-professor system can be found elsewhere (Fonda et al., 2001). The TDA DB was designed with an S-Designor database design tool (SDP Technologies, Inc., 1993). Rhapsody Modeler, a UML (Fowler et al., 2000) based design tool software was used for process-classes documentation (I-Logix, Inc., 2000).

When completed, the Teacher's Digital Assistant will be a portable IS running partially on a Palm OS PDA and partially on a desktop computer. Some data elements are:

- STCODE, STNAME, STFREQ, STNOTES, STWREXAM GRADE, STRDEXAM GRADE, STUDENT-LASTCLASS GRADE,
- TEACODE, TEANAME, TEACOURSE, TEANOTES, TEACHERS GRADE,
- LCTDATE, LCTNOTES.

Entities used are: STUDENTS (regular or evening student), PROFESSOR (or lecturer) also owner of the PDA, LECTURES for students’ presence, and EXAM_INF used when students from other universities ask for exam verification equivalence. By default, one PROFESSOR teaches a single course, otherwise STUDENTS, LECTURES and EXAM_INF entities should me multiplied for each course separately. I have chosen UML’s (Fowler et al., 2000) multiplicity notification (Figure 3) to show the TDA entity dependencies.
I have courses in Slovene, so the TDA database uses the corresponding Slovene names, as seen in Figure 4. Slovene table names: Študentje, Vaje, and Priznanja INF correspond to: STUDENTS, LECTURES, and EXAM_INF English names.

Modern software tools are quite flexible. Even the HanDBase Palm OS database manager (see the next section) allows table columns to be added or removed very easily. In this way the initial database can be easily modified from time to time.

3 DATABASE MANAGER AND INITIAL LOAD

The following paragraphs will describe the HanDBase database manager program used for TDA. A detailed description of DB facilities for both Palm OS version and desktop version will be presented.

The HanDBase database manager program comes for US$30 from a young company DDH Software, Inc. from Boca Raton, Florida (www.ddhsoftware.com). The distribution includes: HanDBase Desktop for Windows application, a HanDBase conduit program for synchronizing the HanDBase Palm Database Manual, HanDBase Palm Application and some Palm applets, i.e. nice DB applications for a PDA. The company supports Palm OS and Pocket PC Handheld Computing platforms. On 8 October (e-mail from news@ddhsoftware.com) DDH Software launched HanDBase ODBC Driver for Windows which should bridge data between handheld computers and corporate data sources. This..... integrates handheld data with MS-Access, SQL Server, DB2 and Oracle.

Each database corresponds to one table, a handheld PDB data file, and a corresponding PDB PC file. These files contain data, links and some code. DDH Software's product is neither pure networking nor a relational database, since you submit a query via filters or find commands that resemble one-to-one to an SQL query, but HanDBase also permits record linking between tables up to four levels deep. Database files are automatically backed-up at HotSync, i.e. normal daily operation of synchronization.
HanDBase data elements may be as usual: text, integer, float, note, date, time and calculated. Some uncommon data types are: link (to), linked (from), unique, checked, pop-up (from a list), DB popup (from another database), heading and image (ICO, EMF and WMF formats). I recommend the reader to verify the documentation for detailed information about these data types.

The initial database load is done via the CSV, i.e. comma-separated file format of the importing facility, appending and/or replacing the existing records. The students’ data on our college computer had to be converted from a widely used YU-ASCII code to a Windows-1250 character set table. Since this procedure happens only once a year we use a regular PC text editor. The DB load was done on 2 October on a desktop PC. Any discrepancies between these database files, i.e. between students from our college and my own database are solved by retyping or other manual-like operation.

4 OPERATION

This section considers the daily operations done by a professor or a lecturer with the TDA. Students’ presence insertion is done with five clicks on a desktop or by tapping the same number of times on a PDA, i.e. there is no character insertion at all except special notes for a single student or his presence.

The most important PDA function is the Date Book where you insert and update all proper events. There are other desktop organizers, too, for example Lotus Organizer, which also has a conduit for synchronizing event data, so that you do not have to use the software that comes with your PDA machine. I use Lotus Organizer desktop software on my home Compaq/NT, Palm Desktop 4.0.1 software on the IBM ThinkPad notebook and on the office Compaq Presario, the first one running a Windows 98 SE operating system, the second one running a Windows NT workstation with NTFS file system for evident security risks.

For database operation I use the same HanDBase Desktop version v2.77a on all personal computers. The reader can verify how TDA entities reflect on any desktop PC in Figure 5. All our regular students should attend lectures. Lecturers normally ask students to sign a presence module. Since I do not have an assistant I give courses and training lectures myself. When the day is over I insert student presences from the above-mentioned module into my WorkPad or into one of the desktop machines. It is important to notice that it does not matter on which computer you do that, since the software automatically synchronizes HanDBase databases from a single handheld computer and more than one personal computer, with the big advantage of having replicated (and backed up) data on three different PCs.

Readers can compare desktop lecture presence data with handheld data in Figures 6 and 7 (on the PDA the screen is limited to 160 by 160 pixels).
Figure 5: TDA desktop files

![Desktop Files Image]

Figure 6: Desktop lecture presences

![Desktop Lecture Presences Image]

Figure 7: Handheld presences

![Handheld Presences Image]
5 CONCLUSION

We have developed a small personal information system that permits any professor or lecturer to carry at least some student data with him or her. Portable computers generally rely heavily on battery life, and notebook computers can very rarely work for eight or more hours without using specially designed (and quite heavy) batteries. Almost all notebook users keep their computers on most of the time, with a (usually external) power supply for their normal work.

But it is quite different with handhelds: weighing about 110 grams, with dimensions that fit in almost every pocket, batteries that last for weeks or more (newer models have rechargeable batteries too). After many years of increase in the personal computer market, 2002 will probably see a decline of 5 or more percent in the worldwide PC shipments base. Forrester Research Inc. predicts the PDA market will grow from 5.7% to 12.2% (see Amelia Aubourg, “PDA markets test out the education market”, www.computerworld.com).

I received one of the rare books on IT in education (Adelsberger et al., 2002) only a few days before the deadline for this paper. At first glance this book contains no article on handheld computers or PDAs. Yet readers may find there an interesting article on presentation recording and other note-taking systems (Müller et al., 2002).

A few research projects are:

- The HandySheets project (http://palmshets.org) where a teacher and all his/her students have to open an account. The teacher designs a worksheet for his/her students that can be downloaded via the AvantGo service (www.avantgo.com) onto students Palm devices. The same HandySheets can be accessed via WEB. The project includes software and WEB templates for HandySheets construction.
- A group of researchers from the College of Engineering, School of Information and School Science at the University of Michigan, Ann Arbor (Soloway et al., 2001) have developed PicoMap, a concept mapping tool for handheld devices for K-12 students. See the report (www.d230.org/Handheld/) on handheld device usage in the Consolidated High School District in Illinois.

According to the above-mentioned Forrester Research report, only 3% of consumers under 21 said they did not know what a PDA was. Tapping with a plastic pen is not difficult even for teachers, but it certainly is very rare.

REFERENCES


E-travelling: 
a generic paradigm for developing tourism web sites

Fotis Lazarinis, Department of Applied Informatics in Management and Finance *
Stefanos Stefanidis, Web Relation Design Inc
Ourania Kougiourouki, Technological Educational Institution of Mesolonghi

Abstract

With the advent of the Internet, tourism promotion as well as the training of the staff involved in tourism could be reshaped through the development of Internet services. For example, training in tourism subjects such as marketing or alternative proposals for vacations such as agro-tourism or ecological vacations could be promoted through the Internet. This conviction of ours has already been put to the test in the pilot application “e-travelling”, which was developed in order to offer and promote On Line tourism services. At the moment, the services offered regard searching for and booking hotel rooms or tours, but in the future the system could offer a variety of other similar activities solely through the Internet.

For the system to provide the services outlined above and to be expandable and adjustable, usable and maintainable, the architectural model uses three discrete roles. These roles are: System Administrator, Service Administrator and, last, Service Customer. Each role has a different view of the system.

In this paper we present a model with three discrete roles and we discuss how this generic model could be tailored in a variety of applications. The proposed model is especially usable for medium size travel agencies offering diverse services, such as hotel bookings, car rentals, alternative vacation proposals and for educational institutes offering online training in tourism or other subjects, seeking a solid categorised educational Web site.

Keywords: Tourism and Information Technology, New Technologies in Tourism, Internet (WWW, Web) Tourism Services, Tourism Education, Medium Size Travel Agencies Online, Tourism Services

* Corresponding author: Fotis Lazarinis
Address: Department of Applied Informatics in Management and Finance, T.E.I. of Mesolonghi, New Buildings, Mesolonghi 30200, Greece.
Tel.: 0030-(0)6310-58354, Fax: 0030-(0)6310-58358.
E-mail: lazarinf@mailbox.gr
Introduction

It is a well-known and widely accepted fact that tourism is one of the most important sectors of the economy in a number of countries around the world and tourism contributes significantly to the national income. It is often the case in international affairs that the policies governing the tourism industries of financially powerful countries change or are determined by geopolitical criteria, a practice which has a direct impact on weaker economies whose national income is largely based on the flow of foreign visitors.

Over the years, the nature and development of tourism have undergone major changes. New tourist behaviours have appeared and fresh, well-promoted destinations have taken the lead. Thus, new practices for attracting tourists have been applied; tourism promotion has become more complex and nowadays is heavily dependent on the changes in Information Technology. Especially with the advent of the Internet and its World Wide Web (WWW or Web) service [Berners Lee et al., 1992], tourism promotion as well as the training of the staff involved in tourism are being reshaped.

At the present time, almost all large scale or worldwide agencies promote their products and services through the Internet. At the same time, small or developing agencies attempt to have a solid presentation on the Internet, and get a “share of the pie”. However, it is often the case that this effort is unsuccessful and worsens the marketing state of the agency. The reasons for this failure vary from a badly designed and unfriendly web site to a slow or not frequently updated site.

This paper proposes a three discrete role architectural model for building web sites. This model can be utilised as a basis for small or medium size travel or other service-providing agencies that desire to build a useful, adjustable and expandable web site. This model is presented later in the paper and potential applications are discussed. But first, we discuss briefly the relationship of tourism and Information Technology, the benefits and the possible pitfalls of Web presence for small or medium size agencies.

Tourism and Information Technology

Information technology (IT) is a term used extensively in every tourism enterprise and by every tourism expert around the world. Many papers and books discuss the need, the benefits and the potential negative consequences of utilising computer technology in managing tourism information and in providing services [Poon 1993, Buhalis 1994, Cook 1998].

Most researchers support the view that as information is crucial for tourism agencies, IT prevails or will prevail in every aspect of their operations [Buhalis 1998]. More than ten years ago, WTO [1988] realised this fact and issued guidelines in an attempt to help agencies to efficiently incorporate new technologies in their daily operations.

Although there has been criticism of the value IT adds to an enterprise [Gable 1992] compared to the expenses needed for adapting the new technology to its needs (or vice versa sometimes), one can argue with confidence that Information Technology offers efficient techniques of exchanging information and transacting business. IT alters the nature of service-providing sectors and facilitates, in most cases, the exploitation of tourism enterprises to the best of human and institutional capabilities.
At this point we would like to clarify that IT is a very broad term that ranges from basic telephony services, through in-house computer networks, to the Internet [Houghton et al., 1996]. In this sense having a fully computerised agency could lead to unpredictable problems, sometimes more than the ones that are supposed to be solved. However, we will concentrate on WWW technology, as a broader discussion is beyond the scope of this paper.

Tourism and the World Wide Web

In simple words, the Internet is a universal computer network facilitating communication among computers geographically distributed around the globe. The World Wide Web [Berners Lee et al., 1992] is an Internet service based on HyperText Markup Language (HTML) [Graham 1995]. HTML files are text files stored on one machine, called WWW or Web Server. WWW clients request specific html files from the server which are then projected back to the client graphically with the aid of a Web browser (simply put, a program that handles the communication). The HTML files stored on the server are called web pages and these web pages constitute the web site which is accessible by its address to other computers.

The real power of WWW arises when the results transmitted to the client are dynamically produced based on the client’s request. In the world of tourism this is absolutely essential, as static information would be of low usefulness. In contrast, producing customised information specifically tailored to the needs of the customer is all that it matters.

Given the fact that the number of Internet users reached 130.6 million during 1999, which is expected to increase to 350 million by 2003 [Emarketer 1999], having a web site is beneficial to a tourism agency as it can increase its customers. Briefly, the main advantages for a tourism agency to have a web site, and especially a dynamic web site, are:

- Access to a world wide market
- Inexpensive way of reaching the world wide market
- Enhancement of competitiveness
- Immediate and uncomplicated alteration of its content
- Low-priced advertising method
- Possibly personalised advertising method
- Enhanced presentation of the services, through the use of multimedia material
- Categorised presentation of the services

“e-travelling” Architectural Model

Although having a web site is a basic advantage over competitors [Connolly et al., 1998], in the majority of cases, especially in tourism agencies with expertise in new technologies, it is often the source of major problems, particularly to small or medium size agencies wishing to have a solid presentation on the WWW. Usually a badly designed or a very ambitious web site forces customers away and worsens the market position of a company.

The e-travelling architectural model is a simplistic three discrete role architectural model which intends to be the basis of building a dynamic web site providing various types
of services. The service administrator, through a series of steps, fills or customises ready templates with the data of his services, uploads images, gives thorough descriptions of his service(s) and then enables them to appear on the Web. The service customer, again through a series of well-defined and simple interfaces, discovers what interests him and orders it or reads it, depending on the type of service.

As we can see in Figure 1, the architecture of the system is based on the Client-Server model and is accessible through the Internet. In other words, a Web Browser (Client) makes a request to the Web Server; the Web Server then processes the information received, communicates with the appropriate repository(ies) and returns the requested information to the user navigation program in the form of HTML. Needless to say, the projected HTML files are dynamically produced, according to the requests of the client.

![Simplistic view of the “e-travelling” architecture](image)

As can be easily understood, each role is actually a different type of user and each user has a different view of the system. The whole system is based on a rather complicated Database (DB) [Date 1982] holding the information which can be broken down into three major repositories of data. The arrows from the page icons to the repository icons in Figure 1 mean that the respective role has modification rights (insert, delete and update in database terms) at the repository where the arrow ends.

The first repository contains information about the categories and sub-categories of services, their characteristics, logins and passwords of the service administrators, their personal details and the services they provide.
In the template repository there are system-ready templates and also information about which templates are suitable for which services. Additionally, this repository holds adapted templates and the templates that each service administrator has used.

The last is the most crucial repository. Data resides there for the services provided, for example the rates, room or car availability, tour destinations. Moreover, one will find there data concerning the clients and transactions.

**System Administrator**

This specific role is responsible for the overall administration of the system. It handles general information and data, the creation and modification of other users, and generally the smooth operation of the “e-travelling” model.

The first and most important function of this type of user is the creation of categories and subcategories of services. It populates the database with information and creates relationships between the categories. At the moment, in the two pilot applications of the “e-travelling” model there is only one general category as shown in Table 1.

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travelling</td>
<td>Hotel Booking</td>
</tr>
<tr>
<td></td>
<td>Tours</td>
</tr>
<tr>
<td></td>
<td>Car Rental</td>
</tr>
</tbody>
</table>

*Table 1. Initial Categories and Sub-categories*

In the future, however, the category and sub-categories should be populated so that the power and “e-travelling” will be expanded. For instance, some new categories could be training, alternative vacations, etc.

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travelling</td>
<td>Hotel Booking</td>
</tr>
<tr>
<td></td>
<td>Tours</td>
</tr>
<tr>
<td>Training</td>
<td>Car Rental</td>
</tr>
<tr>
<td>Alternative Vacations</td>
<td>Tourism Management</td>
</tr>
<tr>
<td></td>
<td>Advertising Techniques</td>
</tr>
<tr>
<td></td>
<td>New Technologies</td>
</tr>
<tr>
<td></td>
<td>Ecological</td>
</tr>
<tr>
<td></td>
<td>Cultural</td>
</tr>
</tbody>
</table>

*Table 2. Additional Categories and Sub-categories*

The data held for the categories can be easily modelled using an Entity Relationship Diagram (ERD) (see Figure 2) [Yourdon & Constantine 1979] which can then be transformed into relational tables, created using a Database Management System (DBMS).
In reality, the entire database is modelled using a general and thus complicated ERD, but we feel that this ERD is out of the scope of this paper because we intend to present the basic concept of the model and not the actual details of implementation.

The system administrator’s next function is the management of the users and especially of the service administrators. Through an email or a web interface, the prospective service administrators contact the system administrator describing their service, asking for a new account. The system administrator then creates the new account, enabling the service administrator to populate the respective templates with his data.

Both the system administrator and the service administrator possess a login name and password in order to use the system. This is absolutely essential if we take into account that financial information resides in the system. Some form of encryption is also necessary when data are communicated through the Internet.

The remaining operations of the system administrator include monitoring the system, the production of statistics, creating new templates, solving possible clashes between the requests of service customers, etc. The system administrator has access to all the repositories of the system in order to perform his duties.

The system administrator, as all the other roles, communicates with the database through a well defined set of web pages which restrict possibly hazardous access to the database and prevent abnormalities in the system behaviour. One could argue that the system administrator should have direct access to the database. In special cases, where the role is “performed” by a computer expert this demand could be satisfied. However, if this condition is not met, the system administrator should be treated as any other user with, of course, more functions enabled.

**Service Administrator**

This particular role is named differently depending on the service involved. For example, when the service involves hotel room bookings, the Service Administrator - for the sake of simplicity - is given the designation “Hotelier”, while in the case of tour bookings she/he is designated the “Agent”.

In any case, the role requires that the user provides detailed descriptions of the services to be rendered, of prices for these services, as well as the time when the service will be available. A particular service can be described in three possible ways.

The first way is to choose specific characteristics from a group of characteristics (see Figure 3). For instance, in order to describe a particular hotel, one would need to determine, among other characteristics, the *Hotel Type, Category, Preferred Currency* to be used for transactions, and a description of its location.
The second way to describe a service is through free textual descriptions. Hence, the unique qualities of the unit providing the services can be unequivocally detailed. For example, an agri-tourism unit can detail exactly its activities, goals, and program. In the case of a sightseeing tour, the routes and the specific sights can be described, as well as any other quality of the particular service that should be mentioned. This approach in textually describing services is especially useful in tourism education where the subjects analysed could be utterly described in this way.

![Figure 3. A screen shot of the first pilot project based on the “e-travelling” model](image)

Last, a service could be described through the addition of logos, photos, as well as brief video and audio clips in order to better illustrate it. The multimedia information can be depicted inside the textual information or as links which pop up new frames.

Subsequently, a service administrator populates his database, selects a set of templates, like the one in Figure 4, and associates them with his service. The templates are used to depict the actual data. The logic behind a template is the same as the logic of variables in a program. When the program is executed the variables take actual values. In the same manner, the templates use parameterised HTML files which take actual values when depicted to the user.

The service administrator is additionally responsible for monitoring the traffic of his system, communicating with his service customers through the system, confirming requests, verifying credit card numbers, maintaining his information, uploading photographs for his service, etc.

It is clear that the only things a service administrator needs are a login account to the system and an Internet connection. Then, through his browser, he logs in the system and follows a series of easy steps to make known to the system, and thus to the public, his service. He does not have to worry about which programming or scripting language was used, in which operating system, or any other implementation details. The service is immediately known to all the customers that frequent the overall web site.
Service Customer

The final type of user is the service customer. This particular user type can connect through the Internet and search for a service that satisfies his needs. First he chooses his category and sub-category and then he can define some or all of the criteria available in the service’s search engine interface. The search engine’s interfaces are again incorporated in the system as templates associated with service categories and sub-categories.

From that point on, detailed descriptions can be presented about whatever services meet the service customer’s criteria. Then, the user can either continue examining other services.
or can choose to exit the system and buy the specific service, at which point he will have to supply the necessary personal information. The user will be sent an e-mail with the details and prices of the services selected, along with instructions on what to do next to complete the booking procedure.

The functionality offered to the service customer is similar to the functionality offered by online shops (e-shops). Hence, the user can buy a product or a service, put it in his cart and continue shopping until he includes all the services needed. As mentioned, when customers decide to go to the check-out point they have to supply their details or retrieve their registered ones if they are old customers. They then receive an email with the details of their purchases.

Synopsis

From the description of the “e-travelling” architecture and its various functions and roles, it is clear that we have attempted to create a simple model for Web tourism service-providing systems. The general rationale behind the system is to make it cover the needs of the consumer through detailed descriptions of every unit that offers services. Small businesses, hotel units, agri-tourism associations, educational institutes providing training, stores or shops selling traditional products, and agencies providing recreational tours of every type can be hosted in the system’s database. In other words, the system intends to be an Internet superstore, a one-stop superstore actually, or in Internet terms a Web gate to product and service selling organisations.

Especially in educational institutes or in other types of agencies or institutes wishing to provide online training, the “e-travelling” model can be quite usable. This is basically due to two facts. First, lessons can be rapidly structured in categories, and, second, every trusted member (teacher or trainer) of the institute with access rights to the system can easily provide material on the Web, for different target groups. Through a series of simple steps a presentation of material can be built and lessons can be made interactive and accessible to a variety of people.

Such a system can be very beneficial for every role involved. The organisation which implements and hosts such a system can gain a large amount of profit, charging only a small percentage for each transaction performed. The more services provided and the more transactions performed, the more the agency hosting the system will profit.

On the other hand, the service administrator can easily and with a very low cost acquire access to a large and growing market without having to be a technological expert. The costs of providing this service to WWW are limited to the cost of a Personal Computer (PC) and of Internet access. Moreover, the service can be described extensively and dynamically through the addition of multimedia (i.e. images, video, sound), which is very difficult and costly if another promotion method is adopted.

Finally, the service customer also benefits because as the advertising and the intermediate agents’ costs are diminished, the services become less expensive. Additionally, let us not forget the convenience of shopping through the Internet and especially the ability to alter our mind at a later point or even cancel without any costs. Also, in the case of “e-travelling”, where the presentation of the services is uniform, the customer can become easily accustomed to the environment and find effortlessly and rapidly his desired information. Lastly, the existence of multimedia data for the description of a service greatly helps the service customer gain a clear perception of the service offered.
Future Work

The “e-travelling” model has been applied up to now in two projects; the first providing hospitality services and the second providing tour booking services. From the application of the model it was made clear that an expansion of the model with new roles and new ways of creating (and not simply altering) new templates are needed.

It was immediately apparent that some service administrators were also customers to other similar services and that they retain strong relationships with each other. With this first version of the model the related service administrators have to behave as service customers in order to buy some services. In the real world, however, these users get a discount when buying in bulk services from another service provider. Thus, the model needs to be expanded to cover the case of affiliated service administrators who are entitled to discounts.

Moreover, some of the service administrators suggested new capabilities. For instance, the ability to create entirely new templates that can be dynamically updated and customised by the service customers. Also the ability to alter the appearance of the current templates was discussed. If these requests are common, then a way of modelling them in the database should be invented.

Another expansion of the model originates from the service administrator’s observation that some of the service administrators are not trustworthy, while others handle service customer requests with great responsibility and some others provide quality services at a low cost. The model should be broadened to include the ability to categorise the service administrators and even the customers. This categorisation should be based on customers’ opinions and ratings, and on service administrators’ opinions when it comes to customers.

Finally, and perhaps most importantly, an exploration of the characteristics of the most important tourism services or products should be made. In this fashion, the model and especially the categorisation of the services can be developed further and even expanded into additional levels of sub-categories. Their correlation should also be identified and utilised in the best interests of the users.

Conclusions

This paper has presented a three role architectural model for building service-providing Web sites. This model is proposed to agencies providing various types of services and to educational institutes providing online training. The services are categorised, giving flexibility to append new services dynamically. The service customer can easily find and purchase the desired services from a set of available offers. The main advantage for the service customer is that in having a uniform interface he can discover and possibly purchase, at a lower price, from his home, the needed services.

The model is based on the idea of templates straightforwardly used and tailored to the needs of the service providers. Although the current version of the model has limitations, it can be easily implemented and utilised by travel agencies, educational institutes, stores, or government agencies, offering them firm advantages.

Figures 3, 4 and 5 were captured from these two projects developed by Web Relation Design, Inc., and are available online at www.travellingworld.gr.
In the near future it is planned that the model will be expanded to include additional
types of facilities and roles. The expansion of the model, in simple words, means the modi-
fication of the underlying database model and the functions of the existing roles.

References

Berners Lee T., Caillau R., Groff J., Pollermann B., 1992, “World Wide Web: The In-
formation Universe”, Electronic Networking: Research, Applications and Policy, Meckler

Marketing on the Internet: An Analysis of Sites and Features”, in: Cornell Hotel and Rest-
aurant Administration Quarterly, June 1996, pp. 70-82.

Buhalis D., 1994, “Information and Telecommunications Technologies as a strategic
Tool for Small and Medium Tourism Enterprises in the Contemporary Business Environ-
ment”, in: Seaton A.V., Jenkins C.L., Wood R.C., Dieke P. U. K., Bennet M. M., Mac
Lellan L. R. and Smith R. (eds.), Tourism - The State of the Art, John Wiley & Sons, Baf-
fins Lane, pp. 254-274.


Connolly D., Olsen M. D., Moore R. G., 1998, “The Internet as a Distribution Chan-

Perspective”, Workshop on Information Technology and Learning Environments in Tour-
ism, Tourism Research Laboratory, UIUC (http://www.tourism.uiuc.edu/itworkshop98/presentation/it13/index.htm).


and Olsen M. (eds.), International Hospitality Management: Corporation Strategy in Prac-
tice, Pitman, London.


Houghton J. W., Pucar M., Knox C., 1996, “Mapping the Information Industries”, Can-
berra: Productivity Commission Staff Information Paper 20, AGPS.

Poon A., 1993, Tourism, Technology and Competitive Strategies, CAB International,
Wallingford.

World Tourism Organisation (WTO), 1988, “Guidelines for the Transfer of New Tech-
nologies in the Field of Tourism”, WTO, Madrid 1988.

Entrepreneurial culture - does education matter?
a tourism industry case study

Matthias Fuchs, University of Innsbruck
Mike Peters, University of Innsbruck
Klaus Weiermair, University of Innsbruck

Abstract

The introductory part of the paper gives a short overview of the recent literature on entrepreneurial culture focusing on personality traits studies and identifying typical characteristics of the "successful entrepreneur" (e.g. Cooper/Dunkelberg, 1982; Leghorèl et al., 2000). The attempt of the paper is to investigate the specific role of formal education and its relevance for the entrepreneurial process of creating new business ventures. After a brief review of entrepreneurial characteristics and key motivational factors for entrepreneurial activities within the Alpine Tourism industry, the paper will discuss three education and career models within the context of alternate theories of schooling and labour market behaviour. For this purpose, the human capital model (Becker, 1993), the signalling model (Spence, 1973) and the informational model of schooling and job worker matching (Davies/MacDonald, 1984) are being critically assessed. The specific purposes of these models are sketched out in order to theoretically explain expected schooling results, such as e.g. enhanced productivity, individual signals and certification. Using labour force survey data gathered from tourism schools in North- and South Tyrol (Austria/Italy) during spring 2000, the empirical part of the paper employs a Linear-Structural-Equation Model (LISREL) to test several causal-effect hypotheses regarding the impact of formal education on the students’ intention to enter the field of entrepreneurship. The concluding section draws implications for educational planning policies aimed at fostering processes of entrepreneurship in tourism.

Key words: entrepreneurial characteristics, entrepreneurial process, educational demand, alpine tourism, schooling models

1 Matthias Fuchs, Ass.-Professor at the Center for Tourism and Service Economics, University of Innsbruck, Universitätsstrasse 15, A-6020 Innsbruck
matthias.fuchs@uibk.ac.at
Considerable research exists regarding entrepreneurs and entrepreneurship and its role in creating and/or maintaining economic welfare or wealth. Research has in the main been focused on different branches of economic activity and different phases of the entrepreneurial growth cycle employing varying approaches and methodologies. This paper represents an attempt to throw some light on forces and intervening variables concerning the role of education and training upon entrepreneurship in tourism. Specifically our interest concerns the influence of labour market conditions and individual schooling upon career expectations and decisions toward entrepreneurship.

In the first part of the paper we introduce the “Schumpeterian entrepreneur” as the relevant frame of reference followed by a review of the old debate as to whether markets create entrepreneurs or vice versa whether entrepreneurs create markets. Chapter 3 presents the process of value creation through entrepreneurs in tourism and demonstrates the role and importance of individual ‘intentions’. Chapter 4 and 5 discuss alternative career decision and/or schooling models thought to be prevalent in tourism labour markets and finally chapter 6 presents the empirical findings associated with the process of human capital formation in tourism and chapter 7 comes up with tentative conclusions with respect to entrepreneurship in tourism.

I. Entrepreneurship theories: a short review

The role of the entrepreneur, the importance of entrepreneurship and the value of entrepreneurial culture have been amply discussed by a number of economists (e.g. Andersen 1994; Cooper/Dunkelberg, 1982; Kirzner, 1973, 1982; Baumol, 1968; Casson, 1982; Schumpeter, 1942; Hayek, 1937, 1978). Schumpeter made it clear that entrepreneurship cannot be merely equated with the ownership of resources or with activities of arbitrage. Furthermore, he occasionally disregarded certain types of entrepreneurs as mere “landlords” (Schumpeter, 1934). As such, Schumpeter wanted to emphasise that his concept of entrepreneurship was to be only associated with an innovative and visionary entrepreneur (Koesters, 1985, p. 210). Even though academics on either side of the Atlantic have addressed numerous questions and provided answers concerning both the nature of the entrepreneurial process and the attributes and personality traits of entrepreneurs, we are still short of a consensus on some of the most important questions. The task of finding a consensual interpretation is rendered also somewhat difficult by the great variety of methods and methodology employed by different disciplines engaged in analysing entrepreneurs and entrepreneurship (e.g., an overview is presented by Gartner, 1985). If we were however to carefully retrace the origins of theory development in the field of entrepreneurship, we would quickly recognize the fact, that there have been only a handful theorists who have contributed with novel paradigms to this field of economic and management research.

With the advent of the neoclassical school of economics the entrepreneur became relegated to the backwaters of economic thinking. This removal of entrepreneurship from mainstream economics has been most aptly described by Baumol when he wrote: “Look for him (the entrepreneur) in the index of some of the most noted of recent writings on value theory, in neoclassical or activity analysis models of the firm. The references are scanty and more often they are totally absent. The theoretical firm is entrepreneurless – the Prince of Denmark has been expunged from the discussion of Hamlet” (Baumol, 1968, p.66-67).

It was Joseph A. Schumpeter who brought the discussion of the origins and importance of entrepreneurship to its intellectual height with the publication of the ‘Theory of Eco-
nomic Development’ (first published 1912). Schumpeter describes the entrepreneur as an
special or unusual person(-ality) who can envisage new services, products or markets by
transforming existing resources through creativity and innovation, leaving it however al-
ways unclear as to the potential influence of environmentally based circumstances, facts or
processes. In this context he writes: “As military action must be taken in given strategic
position, even if all the data potentially procurable are not available, so also in economic
life, action must be taken without working out all the details of what is to be done. Here the
success of everything depends upon intuition, the capacity of seeing things in a way which
afterwards proves to be true, even though it cannot be established at the moment, and of
grasping the essential fact, disregarding the unessential, even though one can give no ac-
count of the principles by which this is done” (Schumpeter, 1934, p.85). Hence this type of
entrepreneur performs the role of transforming resources into new ones, of destroying old
production and distribution processes and revolutionizing new sources for resources or new
markets for consumption. It is these activities which are ultimately responsible for recurring
economic booms for the revitalisation of economic systems but also for the recurrence of
downturns caused by innovation induced market disequilibria. (Schumpeter, 1972, p.214f.).
Schumpeter bases his analysis on the notion that the market equilibrium is constantly dis-
turbed through entrepreneurial acts which in turn are attracted to intervene in markets for
reasons of potential gains in the form of monopoly profits. Imitations in the market place
however quickly close windows of opportunity, thus leading to reduced probabilities of
surplus profit and hence a new market equilibrium. Market equilibrium and market dis-
equilibrium therefore go hand in hand interceded merely by entrepreneurial acts of innova-
tion (Beng, 1996). Schumpeter’s explanation of economic development and growth is based
on a dynamic approach of creative destruction and recreation of markets, economic system
or/and institutions. Schumpeter accepts neoclassical economic reasoning but regards it as a
special case and in the absence of strong entrepreneurship. He furthermore refuses to accept
the notion of rational expectations and perfect foresight by actors in the market place for if
this were the case no economic change would be possible, as we would all find ourselves in
an optimal permanent long run equilibrium, which cannot be altered through expected
higher future profits. Thus, the role of the entrepreneur in finding or creating new sources
of profitability becomes quite clear in that she/he constantly faces the challenges of a shift-
ing market place by undertaking calculated risks, by going his/her own way or by unbun-
dling unconventional new projects. Entrepreneurs create unforeseeable new economic
states and ‘swim against the stream’. While market forces clearly matter with respect to
producing and distributing wanted good and services in line with customer demand, the
critical question becomes one of identifying the variables through which motivate and
energize potential or existing entrepreneurs to generate and sustain new business develop-
ments.

Research on entrepreneurship in tourism is still scanty and in its infancy: There are only
a few pieces of available research which conceptually have explored the formation, role and
importance of entrepreneurship in tourism (see e.g. Leghorèl et al., 2000; Kaspar, 1989;
Kibedi, 1979). Middelton (1998) points out that more creative entrepreneurship is needed in
a fragmented industry or market such as tourism, thus, warranting more research in entre-
preneurship. Furthermore if any research had been undertaken it was less concerned with
processes of creative destruction but rather with determinants associated with short-term
market performance, leaving questions as to how entrepreneurs with specific characteristics
create and maintain long run competitive strategies and operations unanswered (Garnter,
1988). One possible reason for this was the dominance until recently of the neoclassical
market-based view of economic development including tourism development. Only with
the emergence of the competing resource-based view of market developments, emphasising internal capabilities/competencies and technologies has the entrepreneur returned to the centrepiece of interest (Peters/Weiermair, 2001).

II. Entrepreneurship: a question of market or resources?

Especially in the field of tourism the personal characteristics of the tourism entrepreneurs are said to constitute elements of service differentiation (Peters/Raich, 2001). If we use however the Schumpeterian definition of entrepreneurship only those who can and do create market changes or upheavals are considered true entrepreneurs. Thus, the market ultimately remains the arena in which entrepreneurial activities take place and in which entrepreneurship is performed and measured. What has been lacking in much of the discussion on the tourism entrepreneurs is the capability and willingness of entrepreneurs to perceive market reality in varying degrees. Put differently, not every entrepreneur obtains, processes and distributes market information in the same way but there exist behavioural and perception differences in the way entrepreneurs digest and use market information. Ultimately, this information processing capability depends on the core competencies of firms notably their owners/managers.

Adherents of the resources approach have identified the entrepreneur and entrepreneurship as the key determinants of the firm’s output and economic performance. Consequently this school of thought leads to a different strand of thinking and resource perspective for no longer is there a perceived causality running from market structure to –conduct and –performance but rather the sequence of causal effects runs from resources to -conduct and -performance in market firms. For this very reason the analysis of the firms’ socioeconomic and technical environment is of lesser interest than in the analysis of the firms’ strengths and weaknesses of existing and potential resources. Resources and capabilities of the enterprise in growing and maintaining a business become the center of analysis and are employed to explain business performance in the market place (Link, 1997, p. 54).

Prominent business and economics authors such as Barney (1986) and Winter (1987) point out that a firm’s specific management and technical know how play a crucial role in determining business success or failure. In this context they contrast physical resources which can be easily imitated in the market place from codified and firm specific know how and competencies which cannot be easily imitated (Winter, 1987). In achieving firm specific know how and knowledge firms pursue strategies as follows (Grant, 1991, p. 133f.):

1. first they identify potential unique resources which exist within the firm
2. they try to identify markets in which those unique resources yield the highest expected return and
3. they decide over the way in which these resources are being employed in the organisation (Wernerfelt, 1989, p. 4).

Accepting this line of reasoning leads to the recognition that all market information which is being processed by the enterprises and/or the entrepreneurs constitute knowledge resources or know how. Viewed differently resources can be viewed as anything that contributes to a firm’s competitive strengths or weakness (Wernerfelt, 1984), whereas those resources which can generate sustainable competitive advantage display the following (Link, 1997, p.57f.):
they are capable in creating customer value and can facilitate the formation and implementation of efficient and effective market strategies

these are resources which create competitive advantage must be scarce so that not every market participant is capable to copy or imitate them.

these resources transferred inside the enterprise must have some firm specification in order to be protected from raids through outside market participants which can be achieved through internalisation, further development and know how enrichment of the firms resources

Since the entrepreneur is in the main responsible for the creation of these firm specific, unique or internalised resources some authors have suggested to connect Schumpeterian economics with the resource approach (see e.g. Winter, 1995). The resource based view is becoming increasingly important and relevant in highly fragmented industries such as tourism which are populated by many small and medium sized firms and which are threatened by large tourism enterprises in a world of globalisation and increasing competition. In this context Wernerfelt notices the importance of these resources for competitive survival when he writes "The second-best competitors are forced out, leaving a situation where there is no second division in business. Strategies which are not resource-based are unlikely to succeed in such environments. This is so obvious that I suspect that we soon will drop the compulsion to note that an argument is 'resource-based'. Basing strategies on the differences between firms should be automatic, rather than noteworthy" (Wernerfelt, 1995, p.173).

Both approaches furthermore supply differentiated hypotheses with respect to formal schooling and entrepreneurial intentions: on the one hand the environment based view emphasises the value of jurisdictions’ educational policies for the formation of new entrepreneurs, whilst the resource approach sees the most important determinant in the creation of firm-internal skills and competencies creating a “Schumpeterian” type of entrepreneur.

Many researchers believe that there is a stronger link between the role of education and the education system, the incubation of firms and innovative entrepreneurship than had been conceived in the words of the late Schumpeter. The linkage may be more pronounced in the U.S.A., as pointed out by Rosenberg (2000, p.45): "The prominent role played by American universities in the high-tech sectors of the economy since World War II is, in my view, closely connected to these distinctive features of advanced graduate education in the US. These features have been especially critical in such new fields as microelectronics, computer science, and biotechnology, fields where, I think it is fair to say, Europe has continued to lag behind the US."

In empirical analysis of entrepreneurship we can clearly see though the need to combine both the resource and market based views emphasising at the same time market forces and resource transformation. Some studies have already gone this route by neglecting neither the market nor the resource based set of determinants (e.g., Ahmed, 1985; Krueger/Brazeal, 1994). To sum it up the analysis of entrepreneurship in terms of the personal characteristics of the entrepreneur or the creative process of value destruction and creation alone cannot predict business success or failure. Only when taken in conjunction with the interaction of market forces is it be possible to fully explain and predict entrepreneurial behaviour and entrepreneurial performance.
III. The Entrepreneurial Processes in Tourism

Entrepreneurial processes differ from (small) business management processes where the latter start with the growth of a business and, after reaching the maturity phase of growth, end with harvesting the profits. The stages of entrepreneurship on the other hand are characterized by the following phases: ‘Innovation’-, a ‘triggering Event’- and the ‘Implementation’-phase often summarized as the entrepreneurship process (Bygrave, 1989). An entrepreneurial event such as the foundation of a small business marks the end of the entrepreneurial process in the Schumpeterian sense. After an enterprise has been established, management processes become more important to run and to control business activities.

At the beginning of the entrepreneurial process an innovative idea typically leads the entrepreneurial mind to think about possible future plans to open up a business. But only a triggering event, such as the loss of a job or the successful gathering of resources to support these ideas will bring an organisation to life (Hatten, 1998, p. 34). Other triggering effects identified in empirical studies are a certain level of dissatisfaction of the individual (Herron/Sapienza, 1992) or the perception of a current business opportunity (Gynawali/Fogel, 1994). Educational experiences can equally represent the triggering events as push and pull factors toward entrepreneurship.

\[\text{Figure 1: Conceptual Community Tourism Entrepreneurship Model}\]

\[\text{Source: Koh, 1996, p.31}\]
Finally, the entrepreneurial event (Shapiro/Sokol, 1982) happens and the business organisation is formed. Variables influencing this process can be environmental factors such as competition, resources, government policy, and the existence of suppliers (lawyers, bankers, risk-capital ventures, etc.) or personal and sociological characteristics of an individual or a group of entrepreneurs as discussed by the studies presented above (see chapter I).

There is still scope for further research in tourism focusing on entrepreneurial processes. A conceptualization of the entrepreneurial process was proposed by Koh (1996) who derived a conceptual model comprising eight stages of entrepreneurial and, later, managerial processes.

The entrepreneurial process in tourism is conceptualised as eight interacting stages in which each stage is impacted by unfolding environmental events (classified as C=community environmental events and P=personal environmental events). Koh’s process model is more detailed but similar to other entrepreneurial process concepts of e.g. Moore (1986) and Bygrave/Hofer (1991).

However, for the purpose of our empirical enquiry below the first entrepreneurial phase, the cognitive orientation of individuals, should be analyzed in detail: three psychological indicators can be used to define the cognitive orientation towards tourism entrepreneurship, the attitude towards entrepreneurship, the attitude towards the travel industry, and the knowledge of the tourism industry.

The attitude towards entrepreneurship or the willingness for entrepreneurial independence can be a negative or positive one. In the latter case founding an enterprise may be viewed as a chance to improve one’s socio-economic lifestyle. Others may perceive stress, inconvenience or negative pressure when thinking of entrepreneurship in tourism. Certainly, a positive attitude towards entrepreneurship alone is not sufficient to motivate a person to found a tourism business, but the intention to create a business in tourism does only occur when the attitude towards entrepreneurship is positive (Koh, 1996).

Innovative ideas or entrepreneurial attitudes often exist already years before a triggering event opens a window of opportunity to found a business. The mindset or attitude of an individual to become an entrepreneur lays the foundations for future entrepreneurial activities (Airey/Frontistis, 1997; Getz, 1994). Similar to Koh (1996), Bird (1989) identified individual intentionality as a state of mind, the directing attention, the experience, and the action toward a specific goal. These intentions are again influenced by a variety of personal, sociological, and environmental variables.

The next section of this paper will focus on formal education schooling and education processes and its role and relevance for the creation of entrepreneurial intentions or individual intentionality. Two causal models for the opposite extremes of entrepreneurial intention will be presented: model A deals with individuals displaying willingness for entrepreneurial independence and model B observes individuals with no willingness for entrepreneurial independence.

IV. Models of Education

The economist’s view of education is a very broad one. It is assumed that individuals choose the level of schooling that affords greatest level of lifetime wealth (i.e. wage earning), whereas the optimal choice of schooling length is that which balances the present (i.e. discounted) value of post schooling wages and the marginal costs of schooling. Schooling
costs include direct costs of tuition, fees and books, foregone earnings and the psychic costs of studying and being examined (Ehrenberg/Smith, 1991, p. 302). In turn, the wage rate follows from the choice of schooling. Accordingly, education is seen as a multifaceted activity, which involves investment of resources early in life in order that income is greater later on. Human investments are costly and risky with respect to expected returns. One direct connection between schooling and entrepreneurship is therefore the differing assumption of risk and uncertainty. As a consequence, there is ample scope for numerous models of education. For this paper, three educational models, the human capital, the signalling and the information model of job worker matching are briefly summarized in order to give some indication of the direction in which the discussion will proceed.

Education can be envisioned as either productive or unproductive. If the former is true, the increase in income associated with education stems from either an increase in skills or a more effective application of a given collection of skills. The human capital model focuses on the direct increase in skills provided by schooling (Rosen, 1977; Becker, 1993); learning to be a hotel manager is an example. Instead, the informational model highlights the role of schooling in efficiently identifying the most productive application of given skills (Riley, 1976; Davies/MacDonald, 1984). The information model implies that schooling is indirectly productive, because it helps allocate resources to their most valuable use. Therefore, from the students’ point of view it makes sense to first invest in person-specific information to explore one’s comparative labour market advantage and then to exploit that knowledge by building up one’s special skills and abilities.

Finally, the signalling model characterizes schooling as entirely unproductive (Spence, 1973). Some individuals are innately more skilful than others. If individuals are privy to this information, but firms are not, engaging in an extended period of schooling is simply a way to ‘signal’ one’s ability to firms. For example, obtaining a BA degree does not mean that the individual is more productive than previously, nor does it provide any indication of where his skills might best be put to use. Rather, the implication suggests, that the individual is clever enough to succeed in acquiring a BA degree. The reason why education signals might ‘work’, lies in the premise that there are costs involved in signalling, which are greater for low ability applicants. This might be, because it is harder in some sense for low ability people to ‘make the grade’ in education. The presence of differences in signalling costs for students with different learning and/or working capabilities makes the signal of education potentially credible. Consequently, employers might correctly guess that those applicants with higher attainment are likely to be also the more productive workers and offer them higher wages. Under this asymmetric information assumption, ability is not easily observed and signalling serves to generate the missing information for employers (Molho, 1997, p. 63). Essentially, information investment and signalling are two competing interpretations of the non-skill-augmenting and non-consumption-component of schooling.

Nevertheless, empirical tests of the signalling hypothesis have not been conclusive. Most would agree that the pure signalling model, in which education has no impact on productivity, does not appear capable of explaining the range of observed labour market behaviour. For example, professional educational programs such as those in medicine, law, and engineering clearly are more than elaborate screening devices. The premise of the human capital theory, as mentioned above, is the purely productivity-enhancing feature of education that employers are paying for. If that is the case, course content should matter more than just the number of years of education. On the other hand, the signalling model suggests that employers will care more about whether the person finished school than whether they took this course or that one. It is the gap between measured human capital
investments and the labels attached to them that provide the most convincing evidence of
the role of signalling and screening in the labour market behaviour (Benjamin/Gunderson/Riddel, 1998, p. 323). Furthermore, as discussed by Davies and MacDonald (1984), the informational role of education in terms of matching individuals’ interests and abilities may be significant, albeit difficult to measure. As with many controversies in economics, the real world unlikely corresponds to the ‘either-or’ dichotomy in which the discussion is cast (MacDonald, 1980; Davies/MacDonald, 1984).

Let us assume now, that individuals make investments and that we must choose among
the human capital, signalling or information model to help us understand the human in-
vestment process. With regard to the three models of education it might be asked, under
what circumstances would any particular model be the best choice a-priori? It may be
stated, that the models differ significantly in terms of the underlying information structure.

• Schooling requires expenditure of a certain amount of resources; the individual sub-
sequently performs a certain amount of work. If all aspects of this process are known
to all before the investment takes place, the (pure) human capital model would ap-
pear to be most useful.

• In the opposite case, where there is general ignorance about what an individual
would learn from a given investment, and output is costly to monitor, the major
problem is one of information gathering. In this case allocation and hence income
are based on the information (about existing resources) gathered in school (i.e. in-
vestment in information is central); the informational approach dominates.

• In the intermediate case, where the worker knows what skills he has but his effort is
difficult to monitor, the principal determinant of income is the nature of the infer-
ces the firm makes on the basis of schooling decisions; signalling is more impor-
tant.

Thus an a-priori choice between education models comes down to deciding whether the
given situation is one of full information of worker and firms (i.e. human capital model),
poor information for both (i.e. information model) or full information for workers but not
for firms (i.e. signalling model).

The following chapter attempts to investigate the two above presented streams of re-
search. A new schooling model is constructed to focus on those decision variables influen-
cing the willingness for entrepreneurial independence. Figure 2 summarizes the main
predictions of the three education models discussed above, which were integrated into one
single model of education demand (Fuchs, 2001).
V. Sample and research design

In order to empirically test the stated cause-effect relationships between the various exogenous (e.g. present orientation) and endogenous variables (e.g. length of schooling) a random sample within the Tyrolean tourism education system (Austria/Northern Italy) has been drawn in 2000. At the end of their daily courses a sample of 1,678 students were asked to answer a standardized self-administered questionnaire concerning the individual perception towards a series of economic variables influencing schooling decisions (e.g. direct, indirect and psychic cost) related to the ongoing schooling programme. In addition, various labour market expectations which may be leaded back to the educational effort, such as wage increase and wage levels, difficulties to find a job, were evaluated by tourism students. For this, a highly convenient sample technique was pursued as the interviews took
place in the classrooms of 11 different tourism education centres. Consequently, a relatively high response rate of 1,354 questionnaires (i.e. 81 %) arose.

The chosen test consisting in linear structural equations (LISREL) allows to model causal relationships between latent variables. For this the test approach requires an optimal sample size expressed as the ratio between the number of cases and variables (Hair et al., 1995). Consequently, a smaller sample was randomly arranged, leading to a total of 549 completely answered questionnaires.

For causal analyses it is common to use multiple regressions to analyse relationships between a dependent and several independent variables, but unlike structural equation modelling, regression analysis cannot simultaneously analyse multiple dependent variables, and often suffers severely from the problem of multi co-linearity of the independent variables. Beside the estimation of both multiple as well as interrelated dependence relationships, structural equation models further have the ability to represent unobserved concepts in these relationships and account for measurement errors in the estimation process. Measurement errors are not just caused by inaccurate responses but occur primarily when a more abstract concept is tested, such as attitudes or motivations for schooling and entrepreneurial behaviour (Hair et al. 1995, p. 624). Thus, human capital theory, such as mentioned above, provides the rationale for the use of structural equation modelling (LISREL) and may be defined as a systematic set of relationships providing a consistent and comprehensive explanation of a particular phenomenon.

As can be seen from figure 3 two originally exogenous model variables "forward looking behaviour" (i.e. the complementary of "present orientation") and "individual skill endowment" were integrated into the model as endogenous constructs. Furthermore, direct schooling costs were not included in terms of absolute values (i.e. currency units) but rather as the students’ evaluation of the "appropriateness of schooling costs". Finally, "demanded schooling length" was installed not as an endogenous variable, as explaining power with regard to the schooling output "human capital" has been proved.

Doing so, the fit of the data with the causal model of schooling behaviour was relatively high for the following two sub-groups: The first is made up by students showing explicitly no willingness for any entrepreneurial independence (Model A: \( n = 101 \)) while the second one is compounded by those students who explicitly want to pursue a tourism career as a self-employed person (Model B: \( n = 196 \))²: The data set for both sub-groups are fitting to the contrived causal model (e.g. the Goodness of Fit Index of the tested models was .75 and .89, respectively).

² It was observable, at a highly significant level, that the willingness for entrepreneurial independence is positively affected by the fact of already having a family business at home.
Figure 3: Causal Models for two Educational Subgroups

Latent variable (exogenous or endogenous)
Manifest variable (exogenous or endogenous)
Causal relationship
Reciprocal relationship
eps Measures error term of manifest endogenous variables EPSILON)
del Measures error term of manifest exogenous variables DELTA)
eta Measures error term of latent endogenous variables ETA)
VI. Research Results

Both calibrated schooling models (model A and B, figure 3) are able to predict and to explain schooling behaviour. The two sub-groups of those students interested to start an entrepreneurial career and those not interested differ however, apparently in a number of schooling behavioural traits. First of all, the schooling decision variable “self-evaluation of own skill endowments” is most prominent by those students who wish to establish their own business (see table 1). Furthermore, for this sub-group it can be shown that this self-evaluation process is strongly influenced by the students’ learning efficiency. In other words students with entrepreneurial attitudes are able to better use the educational system for their own specific use. Additionally, the desired length to stay at school (i.e. schooling demand) is indirectly determined by the self-evaluation process via ‘forward looking behaviour’ and ‘the expected entry wage level’. These causal relationships differ for the two educational sub-groups (see figure 3: standardized path coefficients).

Table 1: Determinants of schooling behaviour and differences between educational cohorts

<table>
<thead>
<tr>
<th>Willingness for entrepreneurial independence</th>
<th>Self-evaluation of skill endowment</th>
<th>Probability to match skill requirements</th>
<th>Security to find a job</th>
<th>Schooling output: Human Capital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-Groups</td>
<td>Mean</td>
<td>Mean</td>
<td>Mean</td>
<td>Mean</td>
</tr>
<tr>
<td>Absolutely no</td>
<td>47</td>
<td>3.70</td>
<td>3.51</td>
<td>3.85</td>
</tr>
<tr>
<td>Rather no</td>
<td>54</td>
<td>3.87</td>
<td>3.64</td>
<td>3.98</td>
</tr>
<tr>
<td>neutral</td>
<td>144</td>
<td>3.76</td>
<td>3.58</td>
<td>3.98</td>
</tr>
<tr>
<td>Rather yes</td>
<td>108</td>
<td>3.86</td>
<td>3.84</td>
<td>4.06</td>
</tr>
<tr>
<td>Absolutely yes</td>
<td>196</td>
<td>4.01</td>
<td>4.01</td>
<td>4.29</td>
</tr>
<tr>
<td>TOTAL</td>
<td>549</td>
<td>3.87</td>
<td>3.78</td>
<td>4.09</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Willingness for entrepreneurial independence</th>
<th>Expected entry wage level</th>
<th>Signalling</th>
<th>Demanded schooling length</th>
<th>Schooling output: Labour Market Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-Groups</td>
<td>Mean</td>
<td>Mean</td>
<td>Mean</td>
<td>F = 3.89</td>
</tr>
<tr>
<td>Absolutely no</td>
<td>47</td>
<td>4.02</td>
<td>3.25</td>
<td>5.19</td>
</tr>
<tr>
<td>Rather no</td>
<td>54</td>
<td>3.24</td>
<td>3.14</td>
<td>4.59</td>
</tr>
<tr>
<td>neutral</td>
<td>144</td>
<td>3.61</td>
<td>3.14</td>
<td>4.84</td>
</tr>
<tr>
<td>Rather yes</td>
<td>108</td>
<td>3.64</td>
<td>3.12</td>
<td>5.07</td>
</tr>
<tr>
<td>Absolutely yes</td>
<td>196</td>
<td>3.95</td>
<td>3.03</td>
<td>4.95</td>
</tr>
<tr>
<td>TOTAL</td>
<td>549</td>
<td>3.74</td>
<td>3.10</td>
<td>4.93</td>
</tr>
</tbody>
</table>

* indicates significance at the 5 per cent level (F-Test)
** indicates significance at the 1 per cent level (F-Test)
Subsets for alpha =.05: bold type and italics (Duncan’s Test)
Although the relevance in determining schooling behaviour is balanced with regard to the probability to match the skill requirements (of the desired tourism job) it can be shown, that those students with entrepreneurial attitudes evaluate this probability significantly higher. On the other hand, the information structure variable "security to find a job" is significantly judged at a higher level and assessed as a more important determinant for the demand of human capital in terms of enhancing individual productivity through schooling (see table 1). Concerning the latter variable, an interesting observation was made: Whereas for students with no entrepreneurial attitudes the human capital accumulation process is positively determined by the schooling length (i.e. the more years students are willing to spend at school the higher the demand for productivity enhancing skills). For the entrepreneurial educational cohort only small effects can be stated between schooling length and human capital accumulation (see standardized path coefficient in figure 3).

Put differently, at each schooling level students with entrepreneurial capabilities accumulate rather the same amounts of human capital. Thus, it also can be shown that the demanded schooling length between the educational cohorts doesn't differ in any way. Another interesting empirical observation was made with regard to the signal accumulation behaviour. As the human capital model due to its productivity enhancing feature is valid for all the education demanding individuals, signalling should be superfluous for the self-employed. But here it has not been possible to confirm theoretical propositions empirically. Thus, all individuals, independently whether they want to enter in the labour market as an employee or an entrepreneur, wish that their schooling "history" is documented by signals such as labour market certificates and/or diplomas (see table 1). Finally, it was empirically evident that the willingness for entrepreneurial independence was significantly higher for those students who display a lower educational aversion (e.g. students enrolled in post secondary tourism courses such as the executive development tourism program at the University of Innsbruck, Northern Tyrol, Austria and the international tourism school at Brunico, South Tyrol, Italy).

VII. Implication and Outlook

In which ways did the empirical inquiring into the schooling behaviour of students enrolled in secondary and post-secondary tourism programs reveal evidence as to its role and importance for entrepreneurship and what does this imply for tourism and education policies?

In both Northern Italy (Alto Adige) and Western Austria (Tyrol) where the schooling survey had been undertaken the tourism industry is known to display the lowest level of educational attainment measured in terms of years of formal schooling in comparison to any other branch of economic activity (Weiermair et al., 1996). Traditionally dual type apprenticeship training have been designed as an appropriate final career preparation for individuals aspiring careers in tourist related occupation, with the highest percentages of apprentices in tourism forming their own business later in life (Weiermair/Fuchs, 1997). In terms of the above observed schooling behaviour between would be and non entrepreneurs it appears that behavioural differences are rather small with entrepreneurs simply appearing more assertive and cognisant of their skill potential and its later utilization. This however can be interpreted that formal tourism education programs in existing forms neither screen

\footnote{Incidentally this observation holds true for most parts of the world.}
for, nor train for ‘would-be entrepreneurs’ in tourism. The latter is in line with criticism which has been levelled against the technical vocational content of schooling/training programs in tourism (Weiermair, 2000; Weiermair, et al., 1999).

Thus the most obvious conclusion from the empirical study seems to suggest a stronger reorientation of schooling and training programs towards entrepreneurship in tourism. Some recently established new tourism programs in existing and new tourism colleges are undertaking the first efforts in this direction. And as has been shown earlier, it was empirically evident that the willingness for entrepreneurial independence was significantly higher for those students who are enrolled in post-secondary tourism programs (e.g. the Executive Development Program in tourism at the University of Innsbruck or the International School of Tourism in Brunico, Italy).

**Literature**


Hayek, F.A. (1937), Economics and knowledge, Economia, 33-54


Koesters, P.H. (1985), Ökonomien verändern die Welt. München: Goldmann


ism in Southeast Asia and Indo-China. Development, Marketing and Sustainability, (University of Houston: Houston), 293-306

Link, W., (1996), Erfolgspotentiale für die Internationalisierung, (Wiesbaden: Gabler)


Molho, I., (1997), The Economics of Information, (Massachusetts: Blackwell Publishers)


Peters, M., K. Weiermair, (2001), Theoretical Contructs and Empirical Evidence of Entrepreneurial Growth Modes in the Hospitality Industry, Entrepreneurship in Tourism and the Contexts of Experience Economy, Conference April 4 - 7, Rovaniemi, Lapland, Finland


Schumpeter, J.A., (1972), Kapitalismus, Sozialismus und Demokratie, (München: UTB Francke)


The Role of Foreign Languages Instruction in Minimising Communication Breakdowns in Tourism

1Vera Knaajski Hršak, University of Zagreb
Nina Liszt, University of Zagreb
Nevenka Čavlek, University of Zagreb

Abstract

In training for specific purposes in the tourism sector, cultural awareness is an important facet of foreign language instruction. Students’ linguistic competence is often quite advanced and they can easily master the vocational and academic lexical input they are offered in foreign language courses.

Different languages reflect the different cultures they stem from. People look at the world from the perspective of their own language, i.e. culture. Therefore, cultural awareness should be an important part of the foreign language curricula for business purposes. Students majoring in tourism need to be able to avoid communication breakdowns and misunderstandings in addition to being able to communicate within the framework of their professional requirements.

This paper will present the results of a survey on cross-cultural situations which are likely to cause communication breakdowns. The survey was carried out in three language courses: Business English, Business Italian and Business German.

Key words: linguistic competence, communication breakdowns, cultural differences/awareness, English for Academic/Occupational Purposes (EA/OP), educational programmes/syllabi for Tourism.
Introduction

This paper seeks to raise the issue of complementing education for tourism by offering the students multidisciplinary approach in the business language courses offered at the Graduate School for Economics and Business.

It will first discuss the role of linguistic competence in communication, then it will focus on the influence of culture (with a ‘little c’) on language and communication, and it will narrow down to analysing all three within a business framework, more specifically within the tourism environment. Finally a survey carried out at the Department for Foreign Business Languages will be presented and discussed.

Language and communication

“Communication is the process of transferring ideas or thoughts from one person to another for the purpose of creating understanding in the thinking of the person receiving the communication.” (Brieger, 1992)

The role of language as verbal communication is undisputable, although no one can ignore non-verbal communication. Foreign language instruction is all about language as a tool for communication: teaching languages through communication and for communication.

Mistéil (1998) says that effective communication is like water: it is a scarce and expensive resource produced and supplied through a complex distribution and purification treatment which is not visible, and it has filter beds which need regular maintenance. He also relates communication to business pointing out that communication is like a dividend: profits are earned and shared on the basis of a good investment, hard work and success plus a bit of luck. Courses in foreign languages for business purposes are especially useful since they can offer the students an opportunity to become effective communicators and thus be better prepared for competition in the international business environment.

Language and Culture

Tomalin and Stepleski (1993) cite an American researcher Gail Robinson who summarised the elements of culture as the 'Big C' culture (products and ideas, i.e. literature, folklore, art, music and artefacts on one hand and beliefs, values and institutions on the other) and the 'little c' culture (customs, habits, dress, foods and leisure). Although educators, and especially those who train for careers in tourism should broaden the 'Big C' culture, linguistic competence is primarily dependent on the information on the 'little c' culture, i.e. culturally influenced behaviour.
Different cultures are reflected in their respective languages. «Society affects a language, in the sense that any important aspect of social structure and function is likely to have a distinctive linguistic counterpart.» (Crystal 1995) Council of Europe Waystage 90 and Threshold 90 specifications for English include a section on socio-economic competence, which could only be built on a significant amount of information on culturally-influenced behaviour. Foreign language courses can increase the socio economic competence if we add to the syllabi a framework for facilitating the development of cross-cultural communication skills. *Teaching Culture* by Ned Seelye (1988) offered 'seven goals of cultural instruction':

1. To help students to develop an understanding of the fact that all people exhibit culturally-conditioned behaviours.
2. To help students to develop an understanding that social variables such as age, sex, social class, and place of residence influence the ways in which people speak and behave.
3. To help students to become more aware of conventional behaviour in common situations in the target culture.
4. To help students to increase their awareness of the cultural connotations of words and phrases in the target language.
5. To help students to develop the ability to evaluate and refine generalizations about the target culture, in terms of supporting evidence.
To help students to develop the necessary skills to locate and organize information about the target culture.

To stimulate students' intellectual curiosity about the target culture, and to encourage empathy towards its people.

Only those who have been made culturally aware have a chance to succeed in their careers as they are closely connected with their ability to communicate effectively. “Knowledge of the language and grammar is not sufficient for successful communication”, (Wiley, 1987).

Foreign language learners are often frustrated not only by incompetent understanding of the rules of the target language, but also by the unfamiliarity with the socio-cultural context in which communication occurs. In his book *Blunders in International Business* Ricks (1999) states that complete knowledge and understanding of a foreign culture is almost impossible to acquire. There is no general agreement on what ‘culture’ is. Experts agree that it is a complex set of variables involving a group’s beliefs and way of living. Terpstra (1978:2) describes language as a cultural mirror since it reflects the content and nature of the culture it represents. Cultural differences are the most significant and troublesome variables encountered by the multicultural company. These disparities need to be recognised and comprehended, although they will be hard to embrace. Cultures play an important role in international business. Of all aspects of culture, communication may be the most critical. Rick’s book of blunders also focuses extensively on translation mistakes, but those can easily be avoided by hiring competent professional translators. But, what a language instructor can do is to provide students of business/tourism with a set of practical tools that will equip them to be able to:

1. notice cultural behaviour as an integral part of all communication
2. achieve the socio-economic competence which they feel they need
3. be aware of their own culture as well as of that of the target language
4. tolerate, accept and respect other cultural behaviours
5. keep the balance between cultures

(Adapted from *Cultural Awareness* by Tomallin and Stempleski, 1993)

**Language, Communication and Culture in Business**

“A minor misunderstanding may cause a major blunder.” (Ricks, 1999)

Our task as teachers of foreign languages for business purposes is to raise our students’ awareness of the above mentioned tools and of the many similar pitfalls arising from cultural differences. This can also be supported by Rick’s (1999) suggestions for profiling effective international managers, which include: the ability to get along with people, awareness and tolerance of cultural differences, adaptability and open-mindedness to new ideas and cultures, and the ability to learn foreign languages and thus experience a taste of foreign cultures. Culture clashes can even hinder the successful closing of business deals, as in the case of South Korea described by Andrew Ward in Financial Times. “They attribute the problems partly to cultural differences between Anglo-American negotiators and their Confucianist Korean counterparts” (2001).
It is a common opinion that teaching languages at the academic level should include studying languages for specific purposes (LSP) and, as such, ought to be primarily concerned with the terminology or the professional jargon. David Crystal (1995) said that jargon «is a badge of membership», we believe that we can provide our students with an entrance ticket into the world of business. At this university we equip our students, in addition to the specific terminology and jargon, with different language tools for working in the real business world. They range from simple reading techniques, such as skimming and scanning, to communication skills of giving presentations and holding meetings and negotiations, as well as writing skills, such as note-taking and note-making, letter, summary and report writing. All these skills are equally important both for our students who want to pursue an academic career and those who plan to embark on a professional career. The former type of language instruction is commonly referred to in language methodology as English for Academic purposes (EAP), and the latter is called English for Occupational/Vocational purposes (EO/VP) Kennedy (1991)

However, the case of our students specialising in tourism is slightly different. They have to communicate both within the group and outside it, i.e. with other professionals and with the laymen – the tourists – who also belong to different national and socio-economic groups. Communication within the professional group is easier than in the latter groups since there is a common core of knowledge/information they can refer to and the language is only the tool. In the latter group communication is less predictable, more culturally, emotionally and socio-economically burdened, highly situational and, therefore, much more complex. While on holiday tourists have a culture of their own (Nash 1978); although it is the influence of the “nationality culture” that is more dominant than the influence of the “touristic culture” (Pizam, Jeoung 1996: 285).

In spite of the fact that the language of business, particularly at the academic level, puts a greater emphasis on the reading, listening and writing skills in educating for tourism the stress should be put on spoken communication. This is due to the very nature of tourism as a human exchange, as a “people oriented industry” in which employees “have to manage, interact, negotiate, and compromise with people of different culture backgrounds” (Yu, 1999:57) – and all this is carried out at many different levels. Again, it has to be emphasised here that communication is much more complex for those employees who come into direct contact with clients, than for those who communicate only within the professional group.

Since a holiday in a tourism destination at the end becomes nothing else but a memory of an experience, it is often described as an industry that sells intangible services. And communication with tourists is part of these services. The better the communication the more successful the “holiday mix”. Thus communication in terms of respecting and understanding the tourists’ different cultural values and norms helps in creating reliability and trust between tourists and service providers. This has become crucial for the overall impression that a tourist will take home at the end of a holiday.

The relevance of recognising cultural values in the tourist industry is vividly illustrated by an example from the Financial Times which features cultural considerations in the hotel industry, particularly the interior design of a Hong Kong’s hotel. “Feng shui is one of a string of local traditions and cultural demands to which hotel chains must respond while providing the consistent levels of service and luxury that allow them to compete internationally.” Murray claims adding that the Peninsula Hotel is very careful about being “politically correct” (1999).
Naturally, cultural issues can also lead to dangerous and generalisations, undiplomatic criticising or even accusations of cultural imperialism. Foreign language courses for business purposes, particularly at the academic level, almost naturally render themselves to debating on national stereotypes and the dangers they may generate. The national cultural institutions also try to break away from the traditional imagery. “We are almost fighting against the image of thatched cottages and beefeaters as promoted by the British Tourist Authority”, said Roy Cross, the Director of the British Council in Zagreb explaining his view of the Council’s role in Croatia (Brodie, 2002). Particularly the students majoring in tourism should be aware of these generalisations, as well as of the fact that there is much more under the surface. Referring to the Longman’s Dictionary of English Language and Culture (1992) Crystal (1995) said «a dictionary which provides cultural perspective is a brave undertaking, because if its range is comprehensive and its definitions are accurate it will inevitably reflect aspects of the less pleasant side of life, and those reflected may take it amiss.»

However, as educators, and particularly educators in such an extensive/universal field as tourism, we need to cover as many aspects of cross-cultural behaviour as we possibly can. Samovar and Porter (1999) suggest that the knowledge of cultural differences and self-knowledge of how we usually respond to those differences can make us aware of the hidden prejudices and stereotypes which are barriers to tolerance, understanding and ultimately good communication. Once we develop awareness of how culture determines our lifestyles and behaviours, “we are all in a better position to reach across our many borders” (Straus, 1999). Those of our students who have chosen tourism as their profession should be aware of that more than others.

**Research Design**

The research involved the lecturers and students of Business English, Business Italian and Business German at the Graduate School of Economics and Business of the Zagreb University. Each instructor was asked to prepare a questionnaire in the language she is teaching (Appendix 1, 2, and 3). They contained five questions concerning problem areas in which communication breakdowns could occur (the socio-linguistic problems) offering three multiple choice answers in an attempt to explain the reason for the breakdown. The questionnaires were distributed among the students taking the courses in Business English (n=175 and 136), Italian (n =31) and German (n =16) at the beginning of the semester and at the end. The students were given about 10 minutes to circle the answers they thought were the correct explanations for the presented dilemmas. The students were asked to fill out the questionnaires anonymously and informed that the purpose of the testing was purely scientific. At the end of the semester the students were tested again on the same questionnaires.

A chi-square analysis was used to determine the differences in the scores between the two testings. For the purposes of this paper, we shall focus on the numerical aspects and scores coming out of this research, although a more in-depth analysis of each particular language test scores would be recommendable, but that will be left to the individual teacher to deal with.

---

2 The authors would like to thank the Italian lecturer Višnja Golac and the German lecturer Jasenka Kosanović for their contributions in designing their questionnaires and carrying out the research in their classes.
Results of the Survey

In the Italian class the results showed that the number of the correct answers in the second testing at the end of the first semester (academic year 2001/2002) were very significantly higher (Chi-square test; p<0.001). The same was true for the scores of the separate questions. The exception was the third question where the difference was only highly significant (chi square-test; p<0.01).

In the German class the difference between the first and the second testing in terms of the overall scores was significant in favour of the second testing (Chi-square test; p<0.05). For most individual questions no significant difference was established (Chi-square test; p>0.05), except for the third question which showed significant difference (Chi-square test; p<0.05) in favour of the second testing, and the fifth question which is a borderline case (Chi-square test; p>0.005).

The English class did not score as favourably. The overall score of the numbers of the correct answers was better at the beginning of the class than at the end (Chi-square test; p<0.05). As for the individual questions, the first and the fifth question did not score any significant difference (Chi-square test; p>0.05), while the third and the fourth question scored much better in the first testing (Chi-square test; p<0.001, very high significance). Significant difference in favour of the second testing was established only in the second question (Chi-square test; p<0.05).

Discussion and Conclusions

The survey has shown that foreign language instruction for business purposes was partially successful; more so in the Business Italian class than in the Business English class. This is probably due to the fact that the Italian syllabus includes more information on socio-cultural issues than the English. Another reason may be the closeness of the Italian and the Croatian cultures, which is not the case with the cultures of the English speaking countries and Croatia. The third reason for the difference between the scores in the two language classes could be stress (the second time the students in the Business English class were asked to fill in the questionnaire was on the last day of the semester – just before the term test).

The general conclusion, however, could be that there is a great need for adding more cultural input from all types of countries, particularly in the Business English course syllabi. This is particularly recommendable for students majoring in Tourism. The teaching of foreign languages for business purposes focusing on tourism should embrace much more than just teaching the simple specific jargon, i.e. the words and the structures typically used in situations relating to tourism. It should also involve “local and and international contexts that are familiar and relevant to language learners’ lives” (Alptekin, 2002) and professions, as well as the pertaining cultural factors which inhibit successful communication in tourism. Cross-cultural awareness should be an integral part of language learning, a thread through a course as important as lexis, grammar and function (Schofield, 2002).

“Globalisation is also affecting education – particularly higher education – and corporate training.... English will provide a means for second-language countries to internationalise their education systems and thus become major competitors to native-speaking countries in English-medium education'' Graddol (1997). Furthermore, if we agree that the limits of one’s language are the limits of their world we can conclude that the more languages one learns the greater area one covers. In foreign language classes “cross-cultural texts them-
selves are few and far between” (Giber, 1995), but only they can most effectively foster the necessary changes in the students’ minds and “enable them to communicate effectively with others … by equipping them with an awareness of difference, and with strategies for coping with such difference” (Hyde 1988).

Finally, the literature overview and the survey have shown that more emphasis should be put not only on language instruction, but raising the students’ overall linguistic competence which includes cultural awareness. The development of the quality of tourism services has resulted in more sophisticated requirements for higher level of language competence. Therefore, the educational programmes in Tourism should respond to this challenge making foreign language instruction an integral part of the educational programmes in Tourism.

References:


Please read the following paragraphs and circle the letter of the answer which you think is correct according to the English speakers’ communication standards:

1. A student who is just about to graduate in Tourism sees an advertisement in the Croatian newspaper for a job with a multinational tour operator. He/she is excited and writes a letter of application extensively explaining his/her background and skills in perfect English. He/she is very disappointed when he/she gets no answer.

A He/she should have telephoned the tour operator before sending the letter of application.
B He/she should have written a short letter of application and enclosed his CV in note form.
C He/she should not have written the letter in English.

2. A tour operator is having a meeting with the general manager of a luxury hotel in order to make arrangements for some of his VIP customers. He is very satisfied with the staff, the location, the catering, the interior design, etc. However he decides against going ahead with this project. Why?

A The price is not acceptable.
B The general manager has made some terrible grammar mistakes.
C The general manager showed friendliness by hitting him on the shoulder during the entire meeting.

3. A tourism expert goes to an international conference. At the conference excursion he meets one of the organizers who asks him if he likes the conference. The expert answers: «Of course.» The host is upset and walks away quickly.

A It is impolite to answer «Of course» to a question asking for information.
B It is not grammatically correct to answer «Of course» to any questions.
C It is impolite to give short answers to questions in English.

4. Tourist agent: «Good morning, Can I help you?»
   Businesswoman: «Yes, I'd like to book a flight for London with BA on Monday Oct. 8.»
   TA: «Let me check. Yes, there are some vacancies. What's your name, please?»
   BW: «Florence Thackery.»
   TA: «OK. I've booked your flight and I'll write up your ticket now. You can send your secretary to pick it up any time today before 8 p.m.»
   When the secretary came to pick up the ticket the travel agent couldn't find the reservation for Ms Thackery. Why?

A The travel agent's computer skills were poor.
B The businesswoman did not speak Croatian.
C The travel agent did not check the spelling of the businesswoman's last name.

5. A member of the Croatian Tourist Board is giving a presentation on «The Sustainable Development of Croatia's Tourism». While he is reading the paper, his assistant is screening beautiful slides of the Croatian coast. After the talk he is unhappy with the poor feedback his paper has resulted in.

A You should not show slides in a serious presentation.
B You should not read your presentation.
C You should always interrupt your presentation to check the audience's reaction.
APPENDIX 2

1. Il titolare di un'agenzia turistica croata è presente in una riunione con il tour operator italiano. Subito dopo ha un altro impegno ed è costretto ad interrompere la riunione, dicendo: «Mi scusi ma adesso devo proprio andare». Il suo interlocutore ha l'aria un po' perplessa. Perché?
   a) Ha paura che gli sfugga l'opportunità di concludere l'affare
   b) Interrompere una riunione in Italia è considerato scorretto
   c) Voleva invitare il suo collega a pranzo

2. Un operatore economico si presenta alla reception di un albergo croato. Dopo una breve conversazione con la receptionist se ne va poco contento. Perché?
   a) La receptionist, madre di tre bambini, aveva un aspetto trascurato.
   b) La receptionist non parlava la sua lingua.
   c) Non è riuscito ad avere delle informazioni richieste.

3. Un gruppo di operatori economici croati ha invitato i colleghi italiani ad una cena di lavoro. Tutto è stato ottimo: agnello, tanta cipolla, vino, però...
   a) Hanno dovuto aspettare un po' per essere serviti
   b) C'è stato solo agnello e cipolla.
   c) I croati hanno fatto troppi domande sulle loro famiglie

4. Una giovane donna si è presentata in un colloquio di lavoro con tante referenze positive, quattro lingue straniere, ottimi voti di laurea, però' ciononostante non è stata assunta. Perché?
   a) Il selettore è un maschilista
   b) La candidata è venuta con 5 minuti di ritardo.
   c) La sua pettinatura è stata in disordine e non è stata truccata.

5. Un operatore turistico croato ha incontrato un ospite italiano che aveva conosciuto nel suo albergo qualche anno prima. L'incontro è avvenuto in una situazione informale, in spiaggia. Gli ha portato la mano. L'italiano ne è rimasto un po' male. Perché?
   a) Non è educato porgere la mano in spiaggia.
   b) La sua mano era bagnata.
   c) Ha portato la mano per primo.

APPENDIX 3

1. Wenn Sie eine Firma besuchen wollen, kommen Sie am besten ohne telefonische Anmeldung: Ihre Geschäftspartner freuen sich über die nette Überraschung.
   Ja  Nein

2. Fragen Sie Ihren Geschäftspartner nach seiner Familie und danach, wie hoch sein Gehalt ist. So zeigen Sie Interesse.
   Ja  Nein

3. Wenn Sie im Büro bekommen, bieten Sie kroatischen Schnaps an. Das ist eine Spezialität des Landes, die Ihre deutschen Geschäftspartner kennenlernen sollten.
   Ja  Nein

   Ja  Nein

5. Unverheiratete Damen, gleich welchen Alters, legen Wert darauf, als Fräulein angerei
dedet zu werden.
   Ja  Nein

(excerpt from the German textbook)
The influence of vertically integrated travel concerns on education and training in tourism

Nevenka Čavlek, University of Zagreb

Abstract:

Processes of consolidation on tourism markets have created very powerful travel and tourism companies that dictate the rules on tourism generating markets, and on many receiving markets, too. The very complex organisational and management structure of these concerns means that there is a serious problem in recruiting well-educated and highly skilled employees who can fulfil everyday business tasks in a changed and changing business environment. As tourism study programmes at university level have largely neglected education in the field of tour operating management, travel concerns have been stimulated to engage more closely with educational institutions. Tourism study programmes face the urgent need to adapt their courses to incorporate fields of multidisciplinary study which are of highest priority for newly structured travel concerns. These study courses are equally important in both tourism generating and tourism receiving countries.

Key words: tour operators, travel concerns, education.
Introduction

Tourism has been among the fastest growing sectors of the world economy for more than fifty years. The world economy in the past decades has undergone radical changes, and so has the business of tourism. The production of services has replaced the manufacturing of goods as the predominant production activity (Smeral 2001:4). The tremendous development of air-passenger traffic and the favourable package holidays offered to tourism consumers by tour operators have, without doubt, caused a rapid development in international tourism (Čavlek 2000a:325). Tourism has become a big business, and it is nowadays increasingly controlled by big business. Although, depending on the sector, it has been estimated that the tourism business worldwide is dominated by small businesses (Gartner, Lime 2000:6), the airline industry and, lately, tour operators are exceptions to this rule.

Every market-oriented company tries to adapt its business organisation to the conditions and relationships of the market where it operates. As business relationships and conditions on the tourism market alter, companies involved in the tourism business must change and adapt their strategic development plan to the movements on the global tourism market. To survive in the very competitive tourism market, it has become essential for the organisers and distributors of tourism products to merge with, or to take over, companies that deliver different components of the whole product that they supply (Čavlek 2000a:325). It is the only way for travel concerns to be able to have quality control over the services provided. If the service has to be supplied locally, the service company goes multinational to follow its customers (Coves 1996:12). In this way, these companies operate according to global strategies, and make use of local competitive advantages in a world-wide market (Keller 200:292). Since tourism is a semi-functional phenomenon, multinational corporations are not only interested in being involved in the transportation and accommodation sectors, but also in entertainment, insurance, financial services, food production, souvenirs, etc. Consequently, their very complex organisational and management structure has confronted integrated travel and tourism concerns with the problem of recruiting well-educated employees who have the knowledge and skills necessary to respond to the changing business environment. The situation has already stimulated some of the largest tourism concerns to engage more closely with educational institutions.

Vertically integrated travel and tourism concerns in tourism system

One of the best examples of the prominent concentration of travel and tourism business in the hands of a few large corporations on the market, and their expansion to foreign markets, is the development of the 4 major travel and tourism companies in Europe: Preussag, Thomas Cook, Airtours (re-named My Travel Group in February 2002) and Rewe. All of them own tour-operating companies both on domestic markets and abroad, as well as charter airlines, hotel accommodation in many tourism destinations, travel agency distribution chains, and travel agencies in receiving markets. They therefore provide very complex customer care.

"Preussag", who owns TUI (the biggest tour operator on the European market), Thomson Travel Group (No. 1 on the British market), and is also the market leader in The Netherlands, Austria, Finland, Ireland and Poland, claims to cover 70% of the total European package holiday market. The six airlines in the Preussag Group provide more than 20,000
seats and fly to countries all over the world from more than 40 airports throughout Europe. There are a total of 90 aircraft ranging from small jets to Boeing 747s and 300s with enough space for 580 passengers. The Preussag Group takes over 10 million tourists by plane to their destinations every year. The Group owns over 270 properties abroad with over 100,000 beds. They currently employ over 46,000 people (Preussag 2001).

Following the merger at the end of 2000 of the second largest German travel group "C&N" (Condor and Neckermann) with "Thomas Cook", the new company which retained the British name of Thomas Cook became the second largest European travel concern with accumulated turnover of €7.6 billion and an annual client total of 15 million, and thus pushed the British tour operator "Airtours" (My Travel Group) to third place among the largest travel concerns in Europe (FVW 2001).

Fourth place remained in the hands of another German travel group - "Rewe Touristic" which consists of several tour operators on the German market, and some business units abroad. Nevertheless, this Group’s retail side occupies second place among German travel groups after TUI (FVW 2001).

These data prove that tour operating businesses have grown to such an extent that their influence on tourism development, especially in international terms, can no longer be ignored either by tourism policy makers or by tourism theoreticians or tourism educational institutions.

Why has the significance of the contribution of tour operators on tourism development in many countries been ignored, and therefore also been left out of education at university level? Mostly because of some negative aspects of their development and some predictions that medium and low quality supply would swiftly disappear from the market, and with it cheap package holidays. This has not happened because very important factors were overlooked which have kept the package holidays of tour operators at the centre of international tourism demand. Tourism is often regarded as a “controversial sector” (Wahab, 2000:104), and so are the tour operators. “How can you travel abroad and learn nothing from the experience? – Take a package tour!” This is the way many people perceive package holidays (Čavlek, 2000b). But, we have to bear in mind that the holidaymakers of the seventies and the organised trips of today cannot be compared. As the demands and expectations of tourists change over time, tour operators also change their approach to clients. The intensity of their development in the world so far shows that they are economic bodies which relatively quickly and successfully adapt to changes and to the new trends on the tourism market. Day by day they are becoming a more significant part of the overall tourism system (Čavlek 1998:253). Furthermore, it would be difficult to believe that in the present constellation of powers on the market, vertically integrated tour operators would allow the size of their business and their influence on the market to decrease.

Education and training for the needs of vertically integrated travel concerns

The tour operating business has become a multi-billion dollar industry, but a very fragile industry too! Many failures and bankruptcies of vertically integrated tourism companies even in the recent past have proven that this is one of the riskiest industries. It is highly dependant on economic movements on the respective market, on safety and security risks of any kind, and, what is more, it is also a very low net-profit business that makes managers in this field feel as though they are “dancing on thin ice” almost every day. Some compa-
nies are successful, and some are not. A great deal depends on their employment policy. As also stressed by Dale and Robinson (2001:31) “tourism employers often recruit non-tourism graduates”, and even do not always require any formal academic qualifications from new employees (Collins, Sweeney, Geen 1994:5). In most cases it is assumed that with additional training they will overcome the lack of knowledge acquired from tourism education. Sometimes employers prefer non-tourism graduates because they themselves have learned “everything from their own practical experience” and consider themselves real experts in the tourism field, and on the other side feel threatened by those who have an education in tourism. An additional problem found in practice is that employers, not only in this particular field of tourism business, do not consider education in tourism seriously enough. What is there to be studied? Once a tourist – you’re an expert in the tourism business! Anyway, why would special education in tourism be needed when everything can be learned through training in the practice?

There is no doubt that on-going training of employees has to be part of permanent education in this particular field, but it cannot be a substitute for formal education in tourism. One has also to bear in mind that it is much more difficult, and it takes more time and money, to train an inadequately educated workforce (Gamble, 1992). On the other hand, a company might face additional problem if their training programme relies on the knowledge of employees who have been working in the particular field for many years and who are considered as qualified trainers of new employees. Such trainers lack a theoretical background and have little knowledge of the fundamentals of tourism principles and theory. In this case, this type of training can be considered as a cost and not as an investment.

The success of a tourism company on an increasingly competitive and dynamic market depends on well-educated, highly professional and skilled employees that are fully aware of the new business environments. Moreover, employees with appropriate qualifications are becoming a competitive advantage on the market. As integrated travel concerns become more complex every day in their organisational structure, especially with the integration of increasing numbers of business segments within their firms, the need for highly professional, and skilled managers with an educational background in tourism who can fulfil the requirements of the concern in the present and in the future becomes of greater importance to them.

Although tourism companies express nowadays a greater need for employees with an academic degree in tourism, there are still very many that follow the old practice. Where is the problem? We are all aware that tourism is developing in a very dynamically changing environment and therefore the conditio sine qua non for educational institutions in tourism is the obligation that they review and revise their educational programmes much more quickly that in the past. The attitude of tourism companies towards tourism graduates is mostly the result of the fact that education has not kept pace either with the changing nature and diversity of tourism as a field of study (Formica, 1996), or with the new organisational and management structures of the industry in practice. For example, the leading and other important vertically integrated tourism concerns are nowadays combined with charter airlines, which was not the practice until the end of 1997. This situation means that employees in this sector have to have specific knowledge of airline management, as well as of wide range of many other issues. Furthermore, air-charter packages also require from tour operators different organisational and management structures in tourism destinations. Improvisation is not allowed anymore. But this kind of knowledge still cannot be obtained at many universities, because only a few have recently considered the need to introduce tour operating management in their tourism education programme. Even worse, some are still only in
the phase of contemplating introducing this subject, and are in effect far away from thinking about introducing the management of transport operators (airline management, cruise management) as a new course. Why is this so? Simply because tourism theory in this particular field is lagging behind practice. For many academics, the tour-operating business is considered as practice, and not as a field of study at university level. Most of them are not aware that the tour-operating business has very much evolved, especially in the last decade of the 20th century. Therefore, no wonder that the main complaints about universities with tourism programmes can be expressed in the words of the chairman of the board of TUI that “university graduates in tourism leave universities with knowledge that they cannot implement in practice” (FVW, 2001b:227).

This leads us to professors of tourism. Universities are as good as their professors who deliver theoretical and practical knowledge to students. As one of studies on educational needs in tourism has shown, only highly qualified educators with appropriate academic qualifications and sufficient practical training experience can produce quality graduates (Zhang, Lam, Bauer, 2001). Here several problems exist: 1) adapting the academic syllabus to the new notion of the tourism phenomena and the needs of the industry means that universities have to recruit and to develop quality faculty within the constrains of increasingly limited resources; 2) with a lack of resources, and at the same time with faculty employees who are not specialised in a particular field but have “generic degrees” in tourism such as tourism management and international tourism (Dale and Robinson, 2001), universities “cover the gaps” and “delegate” specific curricula to be delivered by such faculty members. Whatever the curricula, they deliver only the knowledge they have and not what they are supposed to teach! 3) there is a considerable lack of co-operation between tourism academics and tourism practitioners, and this is one of the reasons why academics often cannot meet the needs of the industry because they teach theory with little connection to practice; 4) tourism education at university level has not made a clear distinction between knowledge that students should gain at university and the skills that they should obtain through training either within or outside a company.

A step forward can be achieved only with the very close co-operation of educational institutions and the tourism industry. Fortunately, this need is in the process of being recognised on both sides. Practice needs theory as much as theory needs practice. Not so long ago academics were not at all concerned about education for the needs of travel and tourism concerns. The situation is slowly changing, and at present tourism companies are becoming active players in the creation of courses and syllabuses at universities and polytechnics. From the winter semester of 1999/2000, two of the largest tourism concerns in Europe decided to foster close co-operation with tourism educational institutions in order to obtain employees who would fulfil their duties in a highly satisfactory manner. TUI supports the Private Polytechnic School in Göttingen with a 4-year study programme, and Thomas Cook co-operates with Wilhelm-Knapp Polytechnic. Both travel concerns have the same target: to have the opportunity to employ the best graduates, because they see the success of their companies in well-educated staff. This is also achieved through their direct involvement in teaching, as well as in observing students in their practical work in different posts within the companies. The industry has thus shown that the success of their mangers of the future will be based on practically oriented theoretical knowledge. Therefore, an important challenge for polytechnics and universities with tourism and hospitality programmes will be to implement courses of the highest priority for vertically integrated concerns. Formal tourism education programmes do not exist to serve the industry in the narrow sense, but to educate innovative future managers who can lead the development of the industry (Barrows,
Bosselman, 1999). The lack of knowledge of employees at present is in the field of tourism marketing, and specific areas of marketing, especially in brand management, methods and techniques in sales and negotiations, clienting, service guarantees and complaints management, environmental management, globalisation and concentration processes on the tourism market, as well as the yield management of tour operating businesses which is among the most demanding requirements of future managers in this particular field.

Some might argue that these programmes of tourism education are important for the countries of origin of the vertically integrated travel concerns (tourism generating countries), but would be of little significance for tourism programmes in receiving countries to which tour operators send their clients. This would be a very wrong assumption. We have to be aware that many tourism receiving countries depend today on foreign tour operators, but the suppliers of services to tour operators in these countries know little or not enough about the philosophy of the tour operating business, and are not conscious of the serious implications that these large and influential corporations can have on their short and long-term business operations, and consequently on the respective country’s tourism development. On the other side, as tourism concerns supply only one part of their service in the generating country, while the more significant part for the clients is supplied in the tourism receiving countries by different service providers who might either be in their own hands or may just be their partners, it is in the interest of both sides to know where the main business risks lie. EC Directives on Package Holidays, Package Tours and Package Travel set very high standards of tourism consumer protection, making tour operators liable for all aspects of the contract with clients, no matter whether the services are provided by the tour operator itself, or by any of its partners. This has forced tour operators to carefully choose the business partners who will guarantee a superior quality of service. Since these vertically integrated corporations have full control of the product that they supply on the market, they have the destiny of these receiving countries in their hands, and they can quickly decide whether to keep or to abandon a particular market.

EC directives and growing competition on the market have made tourism concerns much more quality conscious. They have been improving the service to their clients constantly, and are becoming increasingly innovative. They have also realised that the standard of services they offer to their clients depends not just on the facilities that they can supply, but even more so on the people that provide the service. Their knowledge, skills and attitudes are becoming the key factors in the competitive battle on the market. Therefore, education and training to gain quality staff is becoming a priority for them, not only on the generating, but also on the receiving markets too.

**Conclusion**

The business of tourism in the last fifty years has undergone radical changes. Airpassenger traffic and tour operators’ favourable package holidays have greatly contributed to the rapid development of international tourism. The continuous growth of international tourism travel and concentration of demand on one side, and supply on the other side, have forced companies involved in tourism to create large corporations with very complex organisational and management structures. The more integrated the travel and tourism concerns are, the more complex and riskier are their business operations. These companies rely every day more and more on well-educated, highly professional and skilled employees that can efficiently conduct the business in a competitive and dynamically changing market.
However, there are two problems that can be identified: 1) travel concerns in many cases employ non-tourism graduates; 2) they complain that university graduates cannot implement the knowledge gained at universities in practice.

In the first case, travel concerns try to find a solution to the problem by training employees for specific tasks. However, one has to be aware that training cannot substitute formal tourism education for the reasons discussed in this paper. In the second case, the problem lies in educational tourism programmes at universities, as well as in the professors who have academic qualifications, but not sufficient practical experience in a particular field. They therefore teach theory with little or no connection to practice.

A solution to these problems can be achieved mainly through closer co-operation between educational institutions and the tourism industry, and by making quicker revisions and adaptations of courses which are relevant to the industry. These changes in the programmes of tourism education are needed not only in the countries of origin of the vertically integrated travel concerns (tourism generating countries), but also in receiving countries. As vertically integrated travel concerns fully control the product they sell on the market, they make their own decisions on keeping or abandoning a particular destination. They do this by judging many factors, but one among the most important in the future will be the quality of education and the skills of the staff that deliver the service to their clients. Therefore, well-educated, trained, highly professional and skilled employees of vertically integrated concerns are becoming the main competitive advantage on generating, as well as on tourism receiving, markets.

After many years of neglect by academics, travel and tourism concerns are nowadays influencing changes in tourism educational programmes to the satisfaction of both sides.

References


An analysis of skills required for selected sectors of the tourism industry

M. Saayman, Potchefstroom University for Christian Higher Education
S. Geldenhuys, Pretoria Technikon

Abstract

Tourism is a relative newcomer to the academic repertoire and literature on the subject revealed a plethora of issues, which need to be addressed when offering training programmes in tourism and hospitality studies. One of the most significant problems is the fact that tourism educators, guided by their individual biases, design tourism curricula with little or no input from the industry.

The aim of the research is to determine what skills are required by industry for travel agents, tour operators and tourist guides.

A two-pronged approach was followed: a literature study as well as a survey. For the survey a questionnaire, covering a wide range of variables divided into eight categories, was used to obtain the opinions of travel agents, tour operators and tourist guides. The surveys were conducted as structured telephonic interviews with representatives of cities and towns in Gauteng Province, Republic of South Africa. The results indicate which aspects are rated as important by the industry that should be included in tourism curricula. The results were divided into three categories namely tourism specific, general and business knowledge.

Keywords: Tourism education, Skills Tourist Guides, Tour Operators and Travel Agents
1. INTRODUCTION

The tourism industry has developed rapidly since World War II. By 1991 worldwide tourism expenditure exceeded the GNP of all but three countries (Hall, 1991:3) and it is growing at a pace more rapid than most economies (2.8% in 1998) while a report of the World Tourism Organisation (WTO) indicate that tourist arrivals grew by 2.4% in 1998 (WTO, 1998). This tremendous growth of the industry has not been achieved without effort, as tourism has had to meet the challenges of economic uncertainties, political upheavals, deregulation and shifts in the levels of consumer confidence with a remarkable degree of ingenuity, management flexibility, marketing skills, commitment to service quality, and a responsibility towards the travelling public. In spite of these challenges tourism will continue to be a growing industry because the factors that have been responsible for its growth during the past decade are still continuing (Harrison & Husbands, 1996:2; World Bank, 1998; WTO, 1998).

South Africa has a phenomenal tourism resource base and this tremendous growth should also have been prevalent in this country. This has however not been the case. Although the first democratic election of the country in 1994 dramatically changed the country’s tourism prospects (Msimang, 1995:20) and the more favourable political climate has led to an increase of international tourist arrivals (Hicks, 1997:7; Saayman, 1996), the tourism industry has not been able to reach its full potential (White Paper on Tourism, 1996:4) One of the reasons for this stipulated in the White Paper on Tourism is inadequate tourism education and training (White Paper on Tourism, 1996:4; Saayman & Van der Merwe, 1996; BMI, 1997:1). Various international studies, such as the one conducted by Sheldon and Gee in Hawaii, concluded that the success of the travel industry in any destination is dependent on the quality of its staff (Sheldon & Gee, 1997:173).

Wood (1995:29) and Croukamp (1996:14) point out that South Africa, like many other countries, relies heavily on tourism for its economic prosperity. In order to maximise the benefits of tourism, South Africa should however, not rely solely on foreign expertise to meet its skilled labour requirements as this would result in tourism-generated revenue leaking out of the country. This will happen through management fees and allowances for multinational enterprises and their expatriate personnel, while South African citizens would be left with the low-skilled jobs, as has been the case in so many third world countries. To prevent this the South African government will have to ensure that training is more accessible and affordable (White Paper on Tourism, 1996:29).

2. PROBLEM STATEMENT

Although tourism is a relative newcomer to the academic repertoire, the literature on tourism education has increased substantially over the last two decades. The literature reveals a plethora of issues which arise when offering tourism and hospitality education and training programmes, ranging from the positive and negative aspects of a multi-disciplinary approach to tourism (Leiper, 1981), to the academic credibility of the study of tourism (Evans, 1988). One of the most significant problems identified is that tourism curricula are designed by tourist educators, who, guided by their individual biases, do so with little or no input from industry (Keyter, 1982; Knutson,1989; Wolfire, 1990; Golden, 1992).
The literature study revealed a number of studies undertaken to develop tourism curricula in conjunction with industry. One such study was undertaken by Koh (1994:853) to develop a 4-year tourism curriculum where the views from the US industry were solicited specifically to likely tourism developments in the 1990’s, the types of human resources that would be most needed by the industry and the scope of knowledge/skills 4-year tourism graduates would be expected to have. The panel suggested that the curriculum should comprise 40% general education, 30% business education, 23% tourism-specific education and 5% experiential education. A similar study, conducted in Hawaii by Sheldon and Gee (1997:173-178), which covered the entire travel industry and canvassed the opinions of both employers and employees, confirmed Koh’s findings. Cooper (1996), working under the auspices of the World Tourism Organisation (WTO), consulted industry, government and educational representatives world wide to determine the key skills required by all parties, and came to the same conclusions as Koh, and Sheldon and Gee.

Apart from the above mentioned skills, the vocational skills that successful travel agents should have, as suggested by various authors such as Reiff (1990), Stevens (1990), Howell (1993), Van Harssel (1994), Davidson (1994), Syratt (1995) and Horner (1996) were also included. The same was done for the tour operator and tourist guide sector for which authors such as Reilly (1991), Pond (1993), Sarbey De Souto (1993), Howell (1993), Yale (1995), Mancini (1996) and Laws (1997) have identified vocational skills.

In order to address the quality of personnel in the tourism industry, educators and trainers have to bear other relevant aspects in mind. International trends in lifelong learning, multi-skilling needs and global competitiveness indicate the need for rethinking education and training systems in South Africa. The development of the NQF (National Qualifications Framework) has placed the country at the cutting edge of these world developments. However the following problems face tourism education:

- Tourism is often used as case study material to add interest to, and to enrich, other disciplines such as economics and geography (Geldenhuys, 2001).
- Tourism education is multi-disciplinary in its approach, and contains elements, which are attractive to other disciplines (Howell and Uysal 1987:62).
- Tourism is a relatively young subject area and therefore lacks the history and evolution of some of the more mature fields of study (Goeldner, 1988). Howell and Uysal (1987:62) argue that tourism is an emerging discipline with a rapidly changing empirical research base.
- The approach to tourism education is currently a fragmented one (Howell and Uysal, 1987:62; Stephen and Moutinho, 1989:119) and there is a lack of clear direction for sustained development.
- Howell (1993:34) maintains that the tourism industry is dominated by small businesses, which are led by entrepreneurs and self-made people who do not have any formal tourism training. These men/women do not necessarily recognise the need to support tourism courses which will increase the overall professionalism of the industry (Pearce et al.; 1998:368 and Undermoore 2000:42).
- Another problem identified by Pearce et al. (1998:368) is that higher education institutions offering tourism courses experience a lack of respect within their own institutions and the community.
- The shortage of tourism staff with appropriate industry experience in industry and relevant qualifications is a serious problem (Geldenhuys, 2001 and BMI, 1997:122).
• Globalisation requires a change in the training and education in the tourism industry (Keller, 1996).
• The boom in information technology will also affect the tourism industry (Frangialli, 1999) and Zoreda, 1999).
• The vast body of knowledge and research issues creates its own set of problems for tourism educators (Saayman, 2000).
• There is a lack of co-operation and interaction among the different stakeholder groups, the training suppliers, the private sector, government and industry associations (Stephen & Moutinho, 1989:121; Go, 1994:345 and Van der Merwe, 2000:42).
• There seems to be a lack of trainer understanding pertaining to private sector training needs (BMI, 1997:132 and Van der Merwe, 2000:42).
• Too few and inadequate standard control and accreditation systems are in place.
• Students from previously disadvantaged communities have little or no travel experience. Their limited frame of reference created difficulties when lecturers have to explain certain concepts (Sime & Potgieter, 2000).
• Despite the White Paper on Tourism of 1996, which emphasises the cruciality of training and education for the tourism industry’s success, there is a lack of understanding from Government in this regard, which does not give training the priority it deserves (Van der Merwe, 2000:41).

While tourism educators in South Africa face the same problems as their international counterparts, they have to deal not only with the unique South African situation in education and training, where large sections of the population have had little or no formal education, but also with the challenges that a changing society and tourism industry present. The successful political transformation in South Africa has opened the country’s tourism potential to the rest of the world, and indeed to the previously disadvantaged groups in society. With this in mind Saayman (1998) is concerned that training should be focussed on the preparation of employees to cater for a new type of tourist, in order for South Africa to stay competitive in a global tourism market. Ferrario (1986:332-348) maintains that it is imperative to understand the evolving patterns of leisure activities of the various population groups in South Africa, and to appreciate the extent of change in a complex society in order to address domestic tourism.

To aggravate matters the report brought out by BMI (1997:119) states that respondents from the travel sector have accused traditional training institutions of offering non-practical, non-directed courses in general tourism, with course content that has very little practical application in the travel service sector. Because of the entry-level skills of travel graduates from the traditional tertiary training institutions and private colleges, a large proportion of private employers in the travel sector prefer to employ school leavers, who are given the necessary in-house and on-the-job training. The inappropriateness of the training received by students at tourism institutions, is cited as the key influence driving this industry trend. This has been confirmed by research done by Van der Merwe (2000). The BMI report (BMI,1997:120) also states that only 20% of graduates with the 3-year National Diploma from Technikons in South Africa find permanent employment in the tourism sector.

Based on the above this study attempted to address the following problem: What are the skills required by industry for travel agents, tour operators and tourist guides?
3. METHODOLOGY

A two-pronged approach was followed: a literature study as well as a survey. The aim of the literature survey was to determine which skills should be included in the questionnaire. The results of the literature study were used to draw up the questionnaire.

Literature study

The literature study was based on a qualitative study, which included monographs, journal articles, conference papers, theses and dissertations, other tourism-related literature as well as sources on education and training. Information searches were conducted mainly on library catalogues and indices, as well as the Internet. Information was also gained from communication on a personal level with individuals from the tourism industry and training institutions, as well as from previous South African Tourism Board (SATOUR) research. Themes of conversation included: Travel Agents, Tour Operators, Tourist Guides, Education, Training, Tourism Industry and Tourism. From the literature study a list of skills were identified (Table 1, 2 and 3) that was then rated by the various sectors of the tourism industry to determine their importance and relevance.

A questionnaire was compiled covering a wide range of variables that were divided into eight categories (based on the results of the literature reviews):

- A general section.
- Personality traits.
- Vocational skills.
- General education.
- Business education.
- Languages.
- Tourism-specific education.
- Experimental training.

Survey

The same questionnaire was used for retail travel agents, tour operators and tourist guides. The respondents were asked to rate (on a five-point Likert scale) the required skills, where 5 = very important and 1 = unimportant.

The three sets of the survey were conducted as telephonic interviews, using structured questions with employees at all levels within the designated sectors. The interviews were conducted with representatives of establishments in cities as well as towns throughout Gauteng Province in South Africa during the months of April and May 2000. A proportional random sample was drawn from the membership of registered ASATA (Association of South African Travel Agents) travel agencies, SATOS (ASATA Outgoing Members) tour operators and tourist guides accredited by SATOUR in Gauteng Province to accurately reflect the constituency of the mentioned sector. 46 Retail travel agencies, 11 outbound tour-operating businesses and 54 tourist guides, representing 25%, 57% and 10% of the respective sector were interviewed.

The Statistical Consultation Service of Technikon Pretoria processed the data. The information was then analysed to determine the skills required for travel agents, tour operators and tourist guides.
RESULTS

The following results were obtained from the research.

The first table indicates the view of the respondents regarding the required level of general education. Table 2 and Table 3 deals with business education and tourism specific education respectively.

From Table 1, the following can be concluded:

Computer skills were rated by both travel agents and tour operators as extremely important. Only 7.7% of the travel agents did not think computer skills were important. However, the majority of tourist guides, almost 70%, thought it was not important.

Travel agents regard communication skills as extremely important. In all of the identified categories of communication skills except business writing, 100% of the respondents rated these skills as extremely important. 16.7% of tour operators rated business writing as not important at all, although all the respondents in the tour operation sector rated all the other categories of communication at least as important. The reason may be that most of the documents they require are prepared and their function is only to send these out to customers. Tourist guides did not rate telephone skills and business writing as highly as their counterparts in the retail travel and tour operations sector, but this was expected, as this is not an integral part of their daily activities. One would, however, have thought that more of the respondents in this sector would have rated listening and language skills as extremely important.

From Table 2 the following can be concluded:

Nearly 11% of the tourist guides did not think it was important to include management theories in an education tourism curriculum and only 8.8% rated it as extremely important. As most of the respondents interviewed were self-employed this is an unexpected result. 100% travel agents and tour operators rated this education skill at least as important.

Only 7.7% of the travel agents and nearly 20% of the tourist guides thought that human resources as an educational theme was not important. This could be explained by the fact that most of the tourist guides are self-employed one-man shows and some of the travel agents work for small businesses where this function probably does not receive much attention. All the tour operators rated it as very important.

An extremely high percentage of the travel agents (84%) and tour operators (100%) rated resort management as important whereas of their colleagues in the tour guiding sector approximately 73% did not think this was important. The fact that such a high percentage of the travel agents and tour operators rated this as important was not expected at all, for the mere fact that they do not have to apply these skills in their day to day work.

From Table 3, the following can be seen:

It is surprising that 16.7% of the tour operators rated tourism geography as not important. However 100% of the travel agents and tourist guides thought this was important. An overwhelming 83.3% of the tour operators rated this skill as extremely important as opposed to 61.5% of the travel agents. One would have expected more respondents from the latter category to rate tourism geography as extremely important, as this section of the tourism industry uses this skill daily when planning itineraries. A lack of knowledge of tourism geography could have dire consequences, especially for the corporate travel agent.
The reason why travel agents rated this skill lower than was expected could be a direct result of the ease with which information can be found nowadays. Most travel agencies are linked to the Internet and are able to access information effortlessly. 16.7% of the tour operators rated this skill as not at all important. The only explanation for this could be that the tour operators who were interviewed are out-bound operators who act as reservation clerks selling pre-packaged tours. With larger tour operators in South Africa there is a certain amount of specialisation and consultants are briefed on destinations or work under supervision for a certain period of time. These consultants would therefore be able to answer questions pertaining to the product. Should they encounter questions they are unable to answer, they could find out and phone back. There is considerable less pressure on the tour operator than on the travel agent who could have a corporate customer in front of him demanding an immediate answer. Tourist guides have to have a thorough knowledge of the region in which they are guiding and this knowledge is tested in the accreditation examination. This could be an explanation for the lower percentage of this group rating this skill as not extremely important.

CONCLUSIONS

The aim of this paper was to identify what skills are required by industry. The latter also had to rate the importance of the skills. This could then be used by academics to develop tourism curricula. A literature study identified the various skills, which were then rated by the industry. From this the following conclusions can be drawn.

General education is seen by all three categories as being important. It is therefore reasonable to conclude that these aspects should be included as core modules in all training programmes, targeting prospective employees for these sectors (travel agents, tour operators and tourist guides) of the tourism industry.

The majority of the respondents from the three different sectors were in agreement that business education should be included in a curriculum with the exception of resort management that were rated low by the tourist guides. The latter was to be expected.

With regard to the tourism specific education all three groups rated all aspects (except hospitality operations) of this educational cluster as important. Tourist guides did not see the value of hospitality operators, which is an aspect that they don’t really deal with.

It was surprising that only the tourist guiding sector was in favour of a generic course. The majority of travel agents (92.3%) and tour operators (100%) preferred specific training and education. As a result the survey indicate a considerable overlap between the training requirements indicated by the three sectors, it would make sense to offer a generic course to train and educate travel agents, tour operators and tourist guides. The general, business, tourism-specific and language requirements seem to be the same and should be included in all tourism curricula for students preparing to enter these sectors of the tourism industry. Certain electives could be offered to address the specific needs of the retail travel, tour operator and tourist guiding sectors. If these skills are compared with what technikons are offering in their B Tech: Tourism Management Programmes, it appears that this qualification compares well with what industry requires as well as what is offered at other international universities. It should however be noted that the depth of these offerings has not been measured. More research on solutions to the problems as was identified in the literature study needs to be done.
BIBLIOGRAPHY

BMI. 1997 (see Business and Marketing Intelligence).

BUSINESS AND MARKETING INTELLIGENCE. 1997. Tourism training needs and re-

sources in South Africa: a situation analysis to assist in the formulation of a tourism training

strategy. Rivonia.

COOPER, C. 1996. GTAT. (Paper presented to the WTO Education and Training Centre


CROUKAMP, D. 1996. Tourism: major growth ahead. Human Resources Management,


EVANS, M.R. 1988. Academic credibility and the hospitality curriculum the image prob-


FERRARIO, F. 1986. Black and white holidays: the future of the local tourist industry in

South Africa. Annals of Tourism? Research, 13(3):332-348,

FRANGIALLI, F. 1999. Technology a boom for small companies. [Online]. Available at:

GELDENHUYS, S. 2001. Career profiles for the travel sector of the Tourism Industry. Un-
published Masters Dissertation. Potchefstroom: Potchefstroom University for Christian Higher

Education.


GOELDNER, C.R. 1988. The evaluation of tourism as an industry and a discipline. (Paper
delivered at the First International Conference for Tourism Educators, University of Surrey).

GOLDEN, F. 1992. ACTE Fosters higher education. Travel Weekly:35, 38, September,


HALL, D.R. 1991. Tourism & economic development in Eastern Europe & the Soviet Un-

ion. New York: Wiley.


HOWELL, D.W. 1993. Passport: an introduction to the travel and tourism industry. Cinc-

nati, Ohio: South-Western Publishing.


Management, 8(l):62-64.

KELLER, P. 1996. Globalisation and Tourism. Proceedings of the 46th AIEST Congress:

Roturua (New Zealand).


KNUSTON, B.J. 1989. Hospitality alumni survey: were expectations met as industry em-


855.


Press.

LEIPER, N. 1981. Towards a cohesive curriculum in tourism: the case for a distinct disci-


426


White Paper on Tourism 1996. (see SOUTH AFRICA. Department of Environmental Affairs and Tourism).

WOLFIRE, E.L. 1990. An explanatory study to determine the status of academic degree programs as related to the professionalization of the field of tourism. George Washington University: USA.


| Table 1: General education for travel agents, tour operators and tourist guides |
|---------------------------------|-----------|-----------|-----------|-----------|
| **General Education**           | 5         | 4         | 3         | 2         | 1         |
| **Computer Skills**             | Travel Agent | 76.9      | 7.7       | 7.7       | 7.7       |
|                                 | Tour Operator | 100       |           |           |           |
|                                 | Tourist Guide | 8.8       | 20.6      | 14.8      | 55.8      |
| **Arithmetical Skills**         | Travel Agent | 7.7       | 15.4      | 30.8      | 7.7       | 38.5      |
|                                 | Tour Operator | 33.3      | 16.7      |           |           |
|                                 | Tourist Guide | 5.8       | 35.2      | 44.4      | 5.8       | 8.8       |
| **Communication Skills**        | Travel Agent | 100       |           |           |           |
|                                 | Tour Operator | 100       |           |           |           |
|                                 | Tourist Guide | 14.7      | 44.2      | 20.5      | 5.8       | 14.7      |
| **Telephone Skills**            | Travel Agent | 61.6      | 23.1      | 7.7       | 7.7       |
|                                 | Tour Operator | 33.3      | 33.3      | 16.7      |           |
|                                 | Tourist Guide | 26.5      | 26.5      | 35.3      | 11.7      |
| **Business Writing**            | Travel Agent | 100       |           |           |           |
|                                 | Tour Operator | 66.7      | 33.3      |           |           |
|                                 | Tourist Guide | 47        | 50        | 3         |           |
| **Listening Skills**            | Travel Agent | 100       |           |           |           |
|                                 | Tour Operator | 66.7      | 33.3      |           |           |
|                                 | Tourist Guide | 47        | 50        | 3         |           |
| **Language Skills**             | Travel Agent | 100       |           |           |           |
|                                 | Tour Operator | 66.7      | 16.7      | 16.7      |           |
|                                 | Tourist Guide | 44.1      | 52.9      | 3         |           |
| **Negotiation Skills**          | Travel Agent | 100       |           |           |           |
|                                 | Tour Operator | 66.7      | 33.3      |           |           |
|                                 | Tourist Guide | 29.4      | 55.8      | 11.8      | 2.9       |
| **Presentation Skills**         | Travel Agent | 69.2      | 15.4      | 15.4      |           |
|                                 | Tour Operator | 66.7      | 16.7      | 16.7      |           |
|                                 | Tourist Guide | 26.4      | 73.5      |           |           |
| **Interpersonal Skills**        | Travel Agent | 61.2      | 38.8      |           |           |
|                                 | Tour Operator | 83.3      | 16.7      |           |           |
|                                 | Tourist Guide | 17.6      | 76.5      | 5.8       |           |
| **Leadership/Social Skills**    | Travel Agent | 76.9      | 15.4      |           | 7.7       |
|                                 | Tour Operator | 83.3      | 16.7      |           |           |
|                                 | Tourist Guide | 32.4      | 64.7      | 2.9       |           |
| **Organisational Skills**       | Travel Agent | 84.6      | 15.4      |           |           |
|                                 | Tour Operator | 83.3      | 16.7      |           |           |
|                                 | Tourist Guide | 26.5      | 70.6      | 2.9       |           |
| **Research Skills**             | Travel Agent | 61.5      | 38.5      |           |           |
|                                 | Tour Operator | 66.7      | 16.7      | 16.7      |           |
|                                 | Tourist Guide | 8.8       | 64.7      | 26.5      |           |
| **Ethical/Social Responsibilities** | Travel Agent | 38.5      | 46.2      | 15.4      |           |
|                                 | Tour Operator | 50        | 33.3      | 16.7      |           |
|                                 | Tourist Guide | 32.4      | 55.9      | 8.8       | 2.9       |
| **Societies & Cultures of the World** | Travel Agent | 23.1      | 46.2      | 23.1      | 7.7       |
|                                 | Tour Operator | 66.7      | 33.3      |           |           |
|                                 | Tourist Guide | 23.6      | 64.7      | 8.8       | 2.9       |
| **Cultural Sensitivity**        | Travel Agent | 61.5      | 23.1      |           | 7.7       | 7.7       |
|                                 | Tour Operator | 16.7      | 50        | 16.7      | 16.7      |
|                                 | Tourist Guide | 38.9      | 41.1      |           |           |
| **Use of Natural Resources**    | Travel Agent | 53.8      | 30.8      | 7.7       | 7.7       |
|                                 | Tour Operator | 83.3      | 16.7      |           |           |
|                                 | Tourist Guide | 32.3      | 58.9      | 8.8       |           |
| **Leisure Appreciation**        | Travel Agent | 69.2      | 23.1      | 7.7       |           |
|                                 | Tour Operator | 83.3      | 16.7      |           |           |
|                                 | Tourist Guide | 14.6      | 50        | 23.6      | 5.9       | 5.9       |
Table 2: Business education for travel agents, tour operators and tourist guides

<table>
<thead>
<tr>
<th>BUSINESS EDUCATION</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANAGEMENT THEORIES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>61,5</td>
<td>30,8</td>
<td>7,7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>83,3</td>
<td>16,7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>8,8</td>
<td>61,7</td>
<td>17,6</td>
<td>2,9</td>
<td>8,8</td>
</tr>
<tr>
<td>HUMAN RESOURCES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>69,2</td>
<td>15,4</td>
<td>7,7</td>
<td>7,7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66,7</td>
<td>33,3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>8,8</td>
<td>41,2</td>
<td>29,4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESORT MANAGEMENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>38,5</td>
<td>23,1</td>
<td>23,1</td>
<td>15,4</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66,7</td>
<td>33,3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>2,9</td>
<td>2,9</td>
<td>20,6</td>
<td>47,1</td>
<td>26,5</td>
</tr>
<tr>
<td>MARKETING THEORIES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>38,5</td>
<td>23,1</td>
<td>30,8</td>
<td>7,7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66,7</td>
<td>16,7</td>
<td>16,7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>5,9</td>
<td>52,9</td>
<td>23,5</td>
<td>5,9</td>
<td>11,8</td>
</tr>
<tr>
<td>SELLING SKILLS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>76,9</td>
<td>7,7</td>
<td>7,7</td>
<td>7,7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66,7</td>
<td>33,3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>5,9</td>
<td>58,9</td>
<td>20,6</td>
<td>5,9</td>
<td>8,8</td>
</tr>
<tr>
<td>PRINCIPLES OF SERVICE MANAGEMENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>61,5</td>
<td>23,1</td>
<td>7,7</td>
<td>7,7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>16,7</td>
<td>50</td>
<td>16,7</td>
<td>16,7</td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>5,9</td>
<td>61,8</td>
<td>26,6</td>
<td>2,9</td>
<td>2,9</td>
</tr>
<tr>
<td>ENTREPRENEURSHIP AND INNOVATION</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>61,5</td>
<td>23,1</td>
<td>15,4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>83,3</td>
<td>16,7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>11,8</td>
<td>41,2</td>
<td>35,3</td>
<td>8,8</td>
<td>2,9</td>
</tr>
<tr>
<td>ACCOUNTING PRINCIPLES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>53,8</td>
<td>23,1</td>
<td>15,4</td>
<td>7,7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>83,3</td>
<td>16,7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>14,7</td>
<td>64,7</td>
<td>14,7</td>
<td>5,9</td>
<td></td>
</tr>
<tr>
<td>PRINCIPLES OF FINANCE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>53,8</td>
<td>23,1</td>
<td>15,4</td>
<td>7,7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66,7</td>
<td>33,3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>20,6</td>
<td>64,7</td>
<td>8,8</td>
<td>5,9</td>
<td></td>
</tr>
<tr>
<td>PRINCIPLES OF ECONOMICS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>38,5</td>
<td>30,8</td>
<td>15,4</td>
<td>15,4</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>83,7</td>
<td></td>
<td>16,7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>2,9</td>
<td>29,4</td>
<td>50</td>
<td>14,7</td>
<td>2,9</td>
</tr>
</tbody>
</table>
Table 3: Tourism specific education for travel agents, tour operators and tourist guides

<table>
<thead>
<tr>
<th>TOURISM-SPECIFIC EDUCATION</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOURISM GEOGRAPHY</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>61.5</td>
<td>30.8</td>
<td>7.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>83.3</td>
<td></td>
<td></td>
<td>16.7</td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>52.9</td>
<td>44.1</td>
<td>2.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PRODUCT KNOWLEDGE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>61.5</td>
<td>38.5</td>
<td></td>
<td>7.7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66.7</td>
<td></td>
<td>33.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>61.8</td>
<td></td>
<td>38.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PRINCIPLES OF FACILITY PLANNING</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>15.4</td>
<td>46.2</td>
<td>38.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66.7</td>
<td></td>
<td>33.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>17.6</td>
<td>64.7</td>
<td>8.8</td>
<td>8.8</td>
<td></td>
</tr>
<tr>
<td><strong>SPECIAL EVENTS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>23.1</td>
<td>46.2</td>
<td>23.1</td>
<td>7.7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>83.3</td>
<td></td>
<td>16.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>2.9</td>
<td>58.8</td>
<td>32.4</td>
<td>5.9</td>
<td></td>
</tr>
<tr>
<td><strong>TOURISM LAW</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>61.5</td>
<td></td>
<td>30.8</td>
<td>7.7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>33.3</td>
<td>33.3</td>
<td>16.7</td>
<td>16.7</td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>2.9</td>
<td>35.3</td>
<td>47.1</td>
<td>14.7</td>
<td></td>
</tr>
<tr>
<td><strong>TOURISM RESEARCH METHODS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>76.9</td>
<td>7.7</td>
<td>7.7</td>
<td>7.7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66.7</td>
<td></td>
<td>16.7</td>
<td>16.7</td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>8.8</td>
<td>61.8</td>
<td>17.6</td>
<td>11.8</td>
<td></td>
</tr>
<tr>
<td><strong>TOURISM DEVELOPMENT POLICIES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>61.5</td>
<td>15.4</td>
<td>23.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>50</td>
<td>50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>11.8</td>
<td>61.6</td>
<td>8.8</td>
<td>11.8</td>
<td>5.9</td>
</tr>
<tr>
<td><strong>HOSPITALITY OPERATIONS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>30.8</td>
<td>53.8</td>
<td>15.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66.7</td>
<td></td>
<td>16.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>5.9</td>
<td>20.6</td>
<td>11.8</td>
<td>38.2</td>
<td>23.5</td>
</tr>
<tr>
<td><strong>SOUTH AFRICAN CULTURES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agent</td>
<td>46.2</td>
<td>38.5</td>
<td>7.7</td>
<td>7.7</td>
<td></td>
</tr>
<tr>
<td>Tour Operator</td>
<td>66.7</td>
<td></td>
<td>33.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourist Guide</td>
<td>55.9</td>
<td>38.2</td>
<td>5.9</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Tourism education and training of professionals in sport

Mato Bartoluci, Ph.D. *, University of Zagreb
Hrvoje Maršanić, University of Zagreb – Sport recreation

Abstract

Sport-related leisure-time activities in tourism represent one of the most significant aspects of contemporary tourism. They are based on the motive of sport and an active vacation, manifested through the sport-competition, sport-recreational and sport-medical aspects of tourism.

The basic assumptions for the development of these specific aspects of tourism are experts of different profiles who take part in the organisation and realisation of sport-related leisure-time activities in tourism.

The main goal of this paper is to present the different ways of educating experts for the needs of sport-related leisure-time activities in tourism.

Keywords: Sport-related leisure-time activities in tourism, sport, experts of sport-related leisure-time activities in tourism

* Full professor, Economic and Management of Sport, Faculty of Kinesiology, University of Zagreb, Horvaćanski zavoj 15, 10000 Zagreb, Croatia
Telephone: (385) 1 3017 922, Fax: (385) 1 3634 146, Email: ffk@zg.tel.hr
1. INTRODUCTION

Tourism and sport are interconnected socio-economic phenomena and have been interconnected since the very beginning of their development.

Sport is not on the sidelines of contemporary tourism. It is one of the constituent elements of sporting activities of tourists: tennis, golf, skiing, horseback riding, sporting games, water sports, etc. Numerous research studies conducted and numerous papers written on this issue testify to the historical development of tourism and sport (Bartoluci and Čavlek, 1998).

The type of tourism in which sport and sport-related leisure-time activities are the main motive for travelling to and staying in a particular tourist destination is called SPORT TOURISM. The varieties of this type of tourism are:

1. competitive sport tourism,
2. winter sport tourism, and
3. summer sport tourism (Bartoluci, 1995).

Sport-related leisure-time activities in tourism have become an increasingly important issue in tourism and they have to be carefully and meaningfully considered, organized and conducted. This is something that educated experts are dealing with today. Namely, education and training of qualified personnel for jobs related to particular aspects of tourism do not imply only the education and training of hotel managers or catering workers, but also the education of all other experts who sell various products and render services in tourism (Vukonić, 1998). The emphasis is on those experts who organize and realize sporting activities in so-called summer tourism. However, all those experts can successfully realize their role in all other varieties of sport tourism as well, for example, in winter sport tourism.

2. THE PROFILE OF PROFESSIONALS IN SPORT TOURISM

In times of the total globalisation of the market, the picture of tourism in the world, and thus also the picture of the Mediterranean region of which Croatia is a part, has changed significantly. Access to distant destinations and the emergence of some new generating markets (Eastern Europe) alter the goals, wishes and motives of tourist service users.

Taking into account the diversified requirements of the users of tourist services, it may be said that for many tourists today the sun and the sea, which used to be the basic motives for travelling, are no longer sufficient. Therefore, the competitiveness of a particular destination on a generating market largely depends on the diversity of the offer in this destination.

Research on the attitudes and motives of tourists on the market both in the tourist generating and in the tourist receiving countries, for example, Reiseanalyse (RA) Tomas, confirms that sport and sport-related physical activities have a significant role in the market battle for tourists.
Education and training of experts for various jobs in sport tourism in Croatia

The following personnel who may find their jobs in sport tourism are educated at the Faculty of Physical Education (now Faculty of Kinesiology) University of Zagreb (Croatia):

- junior-college-trained coaches (polytechnic graduates)
- university-trained physical education teachers,
- masters of science specialized in sports recreation.

The issue of sports recreation in tourism is very complex due to the permanent changes regarding the requirements of tourists. Because of the specific qualities and special requirements of contemporary tourism, the existing qualified professionals/experts do not find a significant place and an active role in Croatian tourism.

To make sports recreation in tourism as efficient, as functional and as economic as possible, particularly from the point of view of economics, the following issues should be analytically defined:

1. the profile of personnel,
2. the selection of personnel,
3. the education and training of personnel,
4. the education and training of providers (“vendors”) of sport and active leisure programmes (hotels, tourist complexes, tour operators, tourist boards),
5. the standardisation of sport and active leisure programmes in tourist destinations.

The profile of professionals in sport tourism

According to the experience and perceptions of developed tourist receiving countries, the personnel who provide sport and active leisure programmes are called animators. In literature originally written in English an equivalent term “entertainer” is used. However, the expression animator is also frequently used to denote a “director who organizes the social and the activities programme on a passenger liner” (Pompl, 1983).

An analysis of the entire animation programme in tourism will help us conclude that a significant amount of sport and recreation contents may be found within the tourist offer. Consequently, it may be added that the role of professionals/experts who deal with sports-related issues within the tourist offer is inevitable.

Accordingly, the role and the function of educated and trained professional personnel in sports-related issues in tourism can be defined and modified. Such experts are then called “sports animators”.

When defining new profiles of experts who will work in sports recreation in tourism we must take into account the planned and the existing animation projects and programmes that may be classified as follows:

- day-time programmes organized for children,
- day-time programmes organized for adults,
- evening programmes organized for children,
- evening programmes organized for adults.
The sports animator, who should organize and carry out the segments of sport and active leisure programmes, must have knowledge and experience and he/she must be acquainted with the ways of how to organize and realize other types of recreation.

The reasons for this are as follows.

1. Emphasis should be put on the teamwork of the animation team. Namely, the entire project, the concept and the programme of sports recreation represent a unit (product) within the tourist offer, so that each member of the team must be able to present it and conduct it.

   In order to be able to completely and successfully meet the goals of sports recreation and in order to be able to realize the optimally set programme of sports recreation, teamwork, not only of an animation team, but also the work of other hotel and tourist workers in a particular destination, is of decisive importance – “the strength of a chain depends on the toughness of its weakest link”.

2. On the one hand, due to the diversity of the sport and active leisure programme, it would not be economically justified to employ too many animators who are specialized only in particular segments in this field. On the other hand, however, it would be inappropriate to look for a “universal animator” qualified for and skilled in all types of activity programmes. It would be best to classify the types of jobs necessary to realize particular programmes in order to make the most of the working time of a sports animator. Therefore, he/she must be ready to respond to the aforementioned requirements.

Apart from the existing profiles of professionals/experts in Croatia and due to the specific requirements and trends in tourism, it appears that it is necessary to create a new profile of professionals/experts. Consequently, the Faculty of Kinesiology University of Zagreb is preparing a new profile of experts – *sports manager in tourism*.

**Classification of education and training programmes**

1. Education of personnel who will work in sports recreation in tourism (sports manager in tourism);

2. “Educating the educators” – the name of a long-term action of the World Tourist Organization. This expression dominantly implies the education and the promotion of teachers at higher levels of education. However, a similar model should be applied at a lower education level, namely, with recreation leaders in tourism;

3. Education of direct providers of services of sports and active leisure programmes (hotel management, management of tour operators, tourist boards and other tourism workers);

4. Education of amateur experts for sports recreation in tourism.

434
3. EDUCATION AND TRAINING OF PROFESSIONALS IN SPORT AND RECREATION IN THE WORLD

Cheffers (1999) metaphorically determines the directions of the development of education in the 21st century: “When Jimmy runs out of the forest, throws a couple of hand springs and stands gleamingly: I climbed the rock and then abseiled down without falling. I feel terrific!” The statement I feel terrific! represents the quality of life, which will be expressed in the 21st century, provided that the programmes of physical education are planned in a different way.

Such a vision of the humanistic function of sports recreation is already applied in tourism in sports recreation. According to the existing perceptions, additional education and training of sports animators in tourism is carried out by hotels, tour operators and “entertainment agencies” specialized in this field. Education is carried out according to the legislative regulations of a particular tourist receiving country and in accordance with the needs of hotels or tour operators in a particular tourist destination.

The very organization of education and training of the aforementioned professional personnel is based on the selection of potential employees. The basic starting points in selection are:

1. defining the needs of a firm for professional personnel,
2. selection of professional personnel who are already predisposed for working in this field due to their acquired knowledge, experience and personality traits.

Appropriate selection produces potential personnel whose personality traits, acquired knowledge and experience meet the requirements regarding the personnel profile in question. With adequate education and training based on seminars or courses, firms will be able to employ the required personnel, in this case, sports animators.

Some firms or agencies define the education model by themselves, taking into account the number of people they need in congruence with the current needs of the firm in question and on the basis of their standardized programmes.

There are firms in which a significant number of sports animators in tourism are additionally educated and in which these organizers are directly employed. These people are educated under the supervision and according to the curricula of a firm that pays for their education. Some examples of such firms are:

- Sol-Melia- Spanish hotel chain
- TUI – the biggest European tour operator
- Neckermann – the brand name of a tour operator in Germany
- Club Med. – specialized tour operator
- Fiesta hotels – hotel chain company
- Zingaro – entertainment agency
- Juppidu – entertainment agency
- InterCollege- hospitality business school

According to the experience of other tourist receiving countries it may be concluded that the profiles of personnel to be employed in sport tourism are educated at two levels:

1. Education at institutions of higher education according to their curricula.
2. Additional education based on the seminars and courses of firms that directly employ a particular profile of personnel that appear on the labour market and are the product either of formal education at various institutions of higher education or of informal education/training (various sports, cultural, ethnological, art, innovation associations).
Starting from a hypothesis by Ralf Corsten, the Chairman of the Executive Board of the TUI GROUP (2002) that by 2010 as many as 2.2 and 3.3 million new jobs could be created, it appears to be necessary to create a more flexible education programme for specialized personnel profiles in tourism, including sports animators in tourism.

4. EDUCATION OF SPORTS ANIMATORS IN CROATIA

The foundations of a quality approach to this specific profile of professional personnel in Croatia were set by the Law on Tourism Activity, as well as by the Book of Regulations about the State Examination for Animators in Tourism in which the conditions for conducting a tourism-related activity are defined.

The Book of Regulations prescribes general and special contents:

1. General contents:
   - basics of the political and economic systems of the Republic of Croatia,
   - basics of tourism and tourism-related legislature,
   - basics of communication etiquette,
   - foreign languages;
2. Special contents:
   - animation in tourism,
   - aspects of recreation in tourism,
   - visual communication in recreation in tourism;
3. Practical part

In Croatia there are sports animators who have become leisure organizers after many years of professional work and after the acquisition of knowledge both in Croatia and abroad in various tourist destinations. A task is also set before some of them to educate and train new personnel.

It is indisputable that the existing animators have an extensive knowledge and experience in working in different tourist destinations. However, are they able to educate future personnel in an appropriate way and taking into account all the didactic principles and teaching methods?

Pompl (1983) agrees that such a hypothesis is very delicate: “It would, however, certainly be wrong to equip a programme with an untrained and badly paid ‘casual animator’, who would perhaps achieve rather more negative than positive results.”

In this sense it is necessary to employ an existing expert in the field of recreation and educate them “how to educate” others.

When planning and classifying the process of education and training at different levels the needs for particular personnel should be defined and the existing problems regarding the employment of these people should be considered. The following problems are particularly expressed:

1. The issue of the defined seasonal character of Croatian tourism

   It is a fact that in Croatia one season in most hotels and tourist destinations lasts barely 4 months. The heavily strained Croatian economy, and consequently tourism, can hardly justify the permanent employment of the aforementioned personnel.
2. High fluctuation of animators

Experience regarding the employment of animators, implying also sports animators, shows that, because of the specific characteristics of these jobs, the average working life of an animator is two to four years. The job of an animator is a job that leaves very little time for spending quality time with one’s family, so that those who seek their career in this domain are rather rare. Mostly, this type of job is an intermediate point before choosing a permanent future employment.

Taking into account everything that has been said, it may be pessimistically concluded that it will be difficult, under such conditions, to achieve a level of quality of services in this domain that some countries achieved long ago.

However, there are also some positive hypotheses.

In Croatia, there are qualified and highly competent young people who are predisposed, as regards their knowledge and skills, for work in tourism. Adequate additional education may produce new personnel in tourism who will meet the world-class standards in a particular domain.

In this respect tourism firms should determine their need for:
1. full-time employment of people within the field of sport and active leisure,
2. part-time employment of workers (seasonal workers).

On the basis of such an analysis it is necessary to work out the plans and programmes of education and training at different levels for particular groups of personnel.

5. EDUCATION OF PROFESSIONALS IN SPORTS RECREATION IN TOURISM (SPORTS MANAGER IN TOURISM)

The intention of educating the expert profile SPORTS MANAGER IN TOURISM has developed at the Faculty of Kinesiology University of Zagreb where this profile of experts would be educated at the Coach Training and Education Department within Social Sciences Polytechnics.

This type of personnel should, in any case, be incorporated in personnel structures employed in hotels or in tourist complexes.

Here is an outline of the curriculum:

1. General contents
   - basics of tourism
   - recreation in tourism
   - developmental psychology of sport
   - sociology of tourism
   - marketing in tourism
   - economics in tourism
   - foreign language (A and B)
   - sports and recreational medicine
   - basics of sports recreation
   - methods applied in sports recreation in tourism
2. **Special contents**
   - tennis
   - swimming
   - sailing
   - diving
   - other water sports
   - skiing
   - golf
   - sporting games
   - other sports

3. **Elective subjects**
   - culture and social dances
   - tourist attractions
   - kinesitherapy.

4. **Field experience in tourist centres.**

   The duration of study is six semesters, totalling 2,400 classes. Apart from the above curriculum and in order to have a higher quality of recruitment of experts on the basis of full-time employment it is also necessary to determine the job description and increase the level of employees in the following tourist techniques:
   1. first aid
   2. basics of management
   3. follow-up of tourist attractions in the world
   4. tourist products and services
   5. business correspondence
   6. hospitality techniques
   7. public mass media.

   Mastering these techniques represents the basis that will contribute to a higher quality of work of the new personnel in tourism, which will consequently help promote the specific “tourist environment”.

---

**6. CONCLUSION**

On the basis of previous research and on the basis of perceptions from this paper, it may be concluded that sport and active leisure (sports recreation) in contemporary tourism is extremely developed and that it consequently demands educated and qualified people who will organize and realize sport and active leisure programmes.

In developed tourist receiving countries, sport and active leisure are organized by sports managers, and realized by sports animators (sports entertainers). While managers are educated at institutions of higher education, sports animators are educated according to special programmes of large hotel chains or tour operators.

In Croatia, the personnel qualified for sport tourism include those educated at the Faculty of Physical Education (now Faculty of Kinesiology), junior-college-trained coaches, physical education teachers, and masters of science – specialists in sport and active leisure.
It would be advisable to educate a special profile of experts – managers of sporting activities in tourism (the curriculum outline is presented in this paper) – who would contribute to the future development of sport and active leisure in tourism, both in Croatia and in some other countries.

REFERENCES


Proper candidate selection for participation in tourism animation training at Turistica-College of Tourism

Tadeja Jere Lazanski, TURISTICA- College of Tourism

Abstract

In this paper, we describe the selection of proper candidates for participation in tourism animation training. We assume that badly selected trainees could influence the dynamics and level of tourism animation training. To facilitate the work for a committee of tourism experts, we used an artificial intelligence technique: an expert system. We wanted to systematically improve proper trainee selection, so we used DEX as the shell of an expert system for decision-making. DEX served as an interactive computer programme for the development of qualitative multi-attribute decision models and the evaluation of options. It was successfully applied to our problem of proper candidate selection. First, we made a definition of our problem (thereby solving half of it). After this and after setting the goal, we had to select criteria that were to be used. With them, we evaluated alternatives. For each criterion, we had to determine if we were able to define all possible conditions. We had to choose among four alternative candidates. We filled the database with existing data, established rules and interconnections. We then had to change it into user-friendly version. Finally, we had to evaluate a model. With this evaluation, we proved that this model correctly evaluated higher level criteria.

Keywords: tourism animation, training, decision-making, artificial intelligence, expert system, multi-attribute decision model, DEX.

---

1 Tadeja Jere Lazanski, TURISTICA-College of Tourism, Obala 29, 6320 Portorose, Slovenia, Tel: +386 5 61 770 32, Fax: +386 5 61 770 20 e-mails: tadeja.lazanski@turistica.edu robert.lazanski@siol.net

---
Preface

Decision-making for proper trainee selection is one of the more important tasks regarding quality training for certain professions. Only an excellent trainee can be guaranteed to do creative work. We assume that badly selected trainees influence both the dynamics and the level of training. A committee that selects the trainees has a highly responsible and complex task. In order to improve proper trainee selection systematically, we will present one of the expert systems for decision-making: DEX. Expert systems are a type of artificial intelligence which is successfully applied to real tasks when it processes decision-making among multiple alternatives and leads to multi-criteria decision-making models. This can be very useful in tourism training. In this paper, we would like to show how we could have more successful decision-making with the help of an expert system. We will achieve this goal with the shell of an expert system - DEX. DEX is an interactive computer programme for the development of qualitative multi-attribute decision models and the evaluation of options. We filled the database with existing data, established rules and interconnections. Then we changed it to a more user-friendly version.

The Core of the Problem

The profession of “Tourism Animator” is a tourism vocation also known as the “Entertainer” or “Guest Relations Officer”. TURISTICA has developed a training programme for tourism animators. All potential trainees must go through certain tests, which prove their abilities to work in this profession.

Work with guests requires a great deal of mental and physical abilities, which are not as necessary with other tourism professions. Self-motivation and the motivation of others bring positive results. Motivation itself ensures the energy we must have in order to achieve our aims (Vila 2000).

An animator's tasks are:
- Leisure time organisation
- Creation of animation programmes
- Informing guests about hotel and tourist attraction offerings
- Counselling guests about animation programs
- Taking care of guests with proper programme selection
- Moderating evening programmes and shows

We can say that proper trainee selection is a decision-making problem. In order to improve proper trainee selection, we will try to find a solution in an expert system - DEX. (Rajković). With DEX, we would like to assist the selection committee with their selection of proper trainees. Furthermore, we would like to avoid a situation where a rejected trainee could claim mistreatment in a civil court. The chosen variant must adjust to requests, which define the mental and physical abilities of trainees.
Multi-Criteria Decision-Making Model

Multi-criteria decision-making models are used for solving complex decision-making problems (Saaty, 1990) and can be used when options must be evaluated by various criteria, aims, values, etc. (Kaluža, 1999). They have a base in restructuring a problem into smaller problems. When we want to solve a problem, we must first make an accurate and appropriate definition of it; this solves half the problem. After this and after setting a goal, we must select criteria that we will use. Among them, we evaluate alternatives. For each criterion, we must determine whether we can define all possible conditions. After this, we must ascertain whether we can define its value on a base of achievable information. Brainstorming, questionnaires, and experts’ decisions can be used for gathering possible criteria.

At the end, we must evaluate the model, proving whether this model correctly evaluates higher-level criteria. Usually we compare the model grades with the evaluators’ grading. Now we can continue with criteria identification, which has the strongest influence upon proper trainee selection.

Criteria selection

We define criteria and use them as a basis of evaluating variants and composing the structure of a decision-making model. Following the principle of wholeness (Bohanec, M. Rajkovič, V, 1995), it is important that we do not overlook any criteria which influence the decision. Other factors must also be attended to: good structuring, non-redundancy and measurability of criteria (Bohanec, 1991). A ranked list of the most important criteria, which are relevant when we choose candidate trainees, does not exist. However, the following criteria are vital: personal and professional honesty, sense of humour, service orientation, treating animation as an art, trustworthiness, high emotional intelligence, reasonability, excellent mental and physical health, enthusiasm, organisational abilities, tactics, excellent memory, communication skills.

From these, on the basis of the requested skills and knowledge, we create a criteria tree, ranking their importance in the general evaluation of a candidate. On the highest level, we will define five basic criteria:

1. General knowledge and intelligence,
2. Organisational skills,
3. Personality,
4. Abilities,
5. Communication skills.
Chart 1: Criteria tree and some of measurability scales
Chart 1 shows how we structured the criteria based on their interdependency and logical connections. We noted that some of them describe the personality elements of a candidate and divided them into character and honesty. Thus, we obtained a criteria sub-tree called personality. We could similarly do so with general knowledge, which we could be divided into formal education, professional experience in tourism, foreign language knowledge, ethics and aesthetics, and so on. Since we wanted to maintain the clarity of Chart 1, we divided the rest of the main criteria separately in tables, which follow.

**Main criteria for proper candidate evaluation**

*Table 1: General knowledge and orientation criteria*

<table>
<thead>
<tr>
<th>General knowledge and orientation</th>
</tr>
</thead>
<tbody>
<tr>
<td>— formal education</td>
</tr>
<tr>
<td>— professional experience in tourism (guiding, moderating events)</td>
</tr>
<tr>
<td>— foreign language knowledge</td>
</tr>
<tr>
<td>— psychology of tourism</td>
</tr>
<tr>
<td>— knowledge of culture</td>
</tr>
<tr>
<td>— knowledge of the arts (music, painting)</td>
</tr>
<tr>
<td>— knowledge of ethics and aesthetics</td>
</tr>
</tbody>
</table>

From the category of general knowledge and orientation, we can judge the potential qualities of a candidate which lead towards excellence. Increasingly, excellence due to strong competitiveness is a more significant decision-making factor for guests when they decide on destinations and accommodation; sun, sea, sand are actually further from guests’ needs, wants and expectations (Finger, 1988). Special care and excellence bring animation to each hotel and tourist destination, making it highly competitive.

*Table 2: Organisational skill criteria*

<table>
<thead>
<tr>
<th>Organisational skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>— Use of resources</td>
</tr>
<tr>
<td>— Leisure time organisation (programmes, games, shows, etc.)</td>
</tr>
<tr>
<td>— Cost control</td>
</tr>
<tr>
<td>— Animation programme evaluation</td>
</tr>
<tr>
<td>— Co-operation in achieving hotel goals</td>
</tr>
<tr>
<td>— Co-operation with local tourism organisations and personnel</td>
</tr>
<tr>
<td>— Teamwork skills</td>
</tr>
</tbody>
</table>

Organisational skills represent the efficiency of a person in his or her relationship with internal and external team-mates. The top management's main concern is to achieve the hotel's aims and to give all the necessary support to achieve these aims with the help of an
excellent animator or leisure organiser. Usually, the aim of a Tourist Company is to achieve high profits, which grow with new guests, who become repeat customers. The trend of chain hotels, like Sol Melià, shows that guests became repeat customers as a result of leisure activities and animation programmes.

Table 3: Personality criteria

<table>
<thead>
<tr>
<th>Personality</th>
</tr>
</thead>
<tbody>
<tr>
<td>temperament (sanguine, choleric, melancholic, phlegmatic)</td>
</tr>
<tr>
<td>character (creativity, ingenuity, diligence, etc…)</td>
</tr>
<tr>
<td>sense of humour</td>
</tr>
<tr>
<td>personal and professional honesty (responsibility, sincerity)</td>
</tr>
<tr>
<td>energy and enthusiasm</td>
</tr>
</tbody>
</table>

Personality is the most important criterion when choosing a candidate. All other criteria can be improved by training the candidate in new knowledge and skills. Personality criteria are inherent and innate - they cannot be taught. Being a professional tourism animator means being an artist as well as having an obligation to work very hard; it also means enjoying permanent learning. Training, exercises and talents, together with discipline, create a successful leisure organisation. (Jere Lazanski, 2000)

Table 4: Abilities criteria

<table>
<thead>
<tr>
<th>Abilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>oral (speech)</td>
</tr>
<tr>
<td>manual</td>
</tr>
</tbody>
</table>

From these criteria and the candidate’s motivation, we can presume success, which can be achieved from the side of the animator. We can obtain a more precise answer if we know what the animator wants from the job. We cannot achieve the best result if one of these elements is missing. Knowledge, abilities and motivation represent the main human mobilisation forces and enable successful achievement (Lipičnik 1997).

Table 5: Communication skills

<table>
<thead>
<tr>
<th>Communication skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>clear speech</td>
</tr>
<tr>
<td>ease of verbal expression</td>
</tr>
<tr>
<td>excellent memory</td>
</tr>
<tr>
<td>appropriate facial expressions</td>
</tr>
<tr>
<td>proper gestures</td>
</tr>
<tr>
<td>desire for ongoing education</td>
</tr>
</tbody>
</table>
In addition to abilities, communication skills are very important: both information transmitting and information receiving abilities. We can divide communication concerning animation into the following parts: monologue, dialogue and the artistic part (Ravkin, 1989). All these parts of communication prove that an excellent animator is able to lead the leisure time of guests in order to gain repeat business.

Table 2: The whole criteria tree

<table>
<thead>
<tr>
<th>Evaluation of a candidate</th>
<th>Personality</th>
</tr>
</thead>
<tbody>
<tr>
<td>General knowledge</td>
<td>temperament</td>
</tr>
<tr>
<td>formal education</td>
<td>sanguine</td>
</tr>
<tr>
<td>finished high school education</td>
<td>choleric</td>
</tr>
<tr>
<td>tourism work experience</td>
<td>melancholic</td>
</tr>
<tr>
<td>foreign language knowledge</td>
<td>phlegmatic</td>
</tr>
<tr>
<td>English</td>
<td>character</td>
</tr>
<tr>
<td>German</td>
<td>ingenuity</td>
</tr>
<tr>
<td>Italian</td>
<td>diligence</td>
</tr>
<tr>
<td>Hungarian</td>
<td>creativity</td>
</tr>
<tr>
<td>knowledge of psychology</td>
<td>sense of humour</td>
</tr>
<tr>
<td>social psychology</td>
<td>personal and professional honesty</td>
</tr>
<tr>
<td>group dynamics</td>
<td>energy and enthusiasm</td>
</tr>
<tr>
<td>individual dynamics</td>
<td>Abilities</td>
</tr>
<tr>
<td>psychology of leisure time</td>
<td>manual</td>
</tr>
<tr>
<td>knowledge of culture</td>
<td>oral (speech)</td>
</tr>
<tr>
<td>prose</td>
<td>Communication skills</td>
</tr>
<tr>
<td>poetry</td>
<td>clear speech</td>
</tr>
<tr>
<td>history of literature</td>
<td>fluent verbal expressions</td>
</tr>
<tr>
<td>knowledge of art</td>
<td>good memory</td>
</tr>
<tr>
<td>painting, sculpting</td>
<td>body language</td>
</tr>
<tr>
<td>music</td>
<td>proper gestures</td>
</tr>
<tr>
<td>dance</td>
<td>appropriate facial expressions</td>
</tr>
<tr>
<td></td>
<td>a desire for ongoing education</td>
</tr>
</tbody>
</table>

Organisational skills

- Use of resources
  - yield management
- Event management in tourism animation
  - daily programmes
  - weekly programmes
  - season programmes
  - possible programmes
  - free programmes
  - offered programmes
- Cost management
  - direct costs management
  - indirect costs management
- Animation programme evaluation
  - knowledge of methods and techniques of animation programme evaluation
- Team co-operation in order to achieve goals of a hotel
  - common vision of hotel achievement
- Co-operation with local-level organisations
- organisation of teamwork on local level
- recognition of tasks of all teams


**Measurement scales**

DEX is an interactive computer program using qualitative (symbolic) attributes instead of quantitative ones (Bohanec, 1995); in our case, we used only words (Chart 1). We evaluated candidates on a four level scale: unacceptable, acceptable, good, and excellent. Creativity, however, was measured with the following scale: poor, acceptable, good and excellent. Scales were ranked from least desirable to the most desirable, while DEX accelerated the process of taking utility functions.

**Utility functions**

DEX represents utility functions by if-then decision rules (the second characteristic of DEX called elementary decision rules), which explain how we (the decision-makers) view particular combinations of attribute values. We defined these functions in table form. Table 6 represents the decision rules with which we make evaluations depending on the creativity, ingenuity and diligence of a candidate. We made similar tables for other attributes: the value of a candidate, main criteria and a personality criteria sub-tree.

**Table 6: Decision rules for personal and professional honesty criterion**

<table>
<thead>
<tr>
<th>RESPONSIBILITY</th>
<th>SINCERITY</th>
<th>PERSONAL AND PROFESSIONAL HONESTY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Low</td>
<td>Worse</td>
<td>Unacceptable</td>
</tr>
<tr>
<td>2 Medium</td>
<td>Worse</td>
<td>Unacceptable</td>
</tr>
<tr>
<td>3 High</td>
<td>Worse</td>
<td>Unacceptable</td>
</tr>
<tr>
<td>4 Low</td>
<td>Medium</td>
<td>Unacceptable</td>
</tr>
<tr>
<td>5 Medium</td>
<td>Medium</td>
<td>Acceptable</td>
</tr>
<tr>
<td>6 High</td>
<td>Medium</td>
<td>Good</td>
</tr>
<tr>
<td>7 Low</td>
<td>Better</td>
<td>Acceptable</td>
</tr>
<tr>
<td>8 Medium</td>
<td>Better</td>
<td>Good</td>
</tr>
<tr>
<td>9 High</td>
<td>Better</td>
<td>Good</td>
</tr>
</tbody>
</table>

Defining decision rules was quite easy with DEX. DEX generated a table with all combinations of the values of independent options. We only had to fill in the last column. DEX cautioned us about possible inaccuracies and in some places it made a correction of the proper values, deriving conclusions from other rules.

**Descriptions of options**

We chose four candidates. We had to gather basic data about each of them, (the data on the leaves of the above criteria tree): general knowledge, creativity, ingenuity, diligence, responsibility, sincerity, energy and enthusiasm and communication skills (see Table 7).
Results of evaluation

We set aside our previous decision model and collected data about our potential candidates. DEX evaluated them in harmony with the criteria structure and decision rules. The results are shown in Table 2. Final evaluations of candidates are presented in the row labelled “CANDIDATE”. We can see that the evaluations of the first four candidates were “acceptable”, “good”, “unacceptable” and “good”, in that order. We had to check the correspondence and accuracy of the results and establish the final decision.

Table 7: Results of the evaluation of four candidates

<table>
<thead>
<tr>
<th>CANDIDATE</th>
<th>Candidate 1</th>
<th>Candidate 2</th>
<th>Candidate 3</th>
<th>Candidate 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENERAL KNOWLEDGE</td>
<td>Acceptable</td>
<td>Good</td>
<td>Unacceptable</td>
<td>Good</td>
</tr>
<tr>
<td>ORGANISATIONAL SKILLS</td>
<td>Medium</td>
<td>Medium</td>
<td>Worse</td>
<td>Better</td>
</tr>
<tr>
<td>PERSONALITY</td>
<td>Acceptable</td>
<td>Good</td>
<td>Unacceptable</td>
<td>Good</td>
</tr>
<tr>
<td>CREATIVITY</td>
<td>Average</td>
<td>Good</td>
<td>Bad</td>
<td>Excellent</td>
</tr>
<tr>
<td>INGENUITY</td>
<td>Average</td>
<td>Bad</td>
<td>Average</td>
<td>Good</td>
</tr>
<tr>
<td>DILIGENCE</td>
<td>Low</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>TEMPERAMENT</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Inadequate</td>
<td>Quite</td>
</tr>
<tr>
<td>SENSE OF HUMOUR</td>
<td>Medium</td>
<td>Medium</td>
<td>Small</td>
<td>Adequate</td>
</tr>
<tr>
<td>PERSONAL AND PROF HONESTY</td>
<td>Acceptable</td>
<td>Acceptable</td>
<td>Unacceptable</td>
<td>Good</td>
</tr>
<tr>
<td>RESPONSIBILITY</td>
<td>Medium</td>
<td>High</td>
<td>Low</td>
<td>Medium</td>
</tr>
<tr>
<td>SINCERITY</td>
<td>Better</td>
<td>Medium</td>
<td>Worse</td>
<td>Better</td>
</tr>
<tr>
<td>ENERGY AND ENTHUSIASM</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>ABILITIES</td>
<td>Excellent</td>
<td>Very Good</td>
<td>Worse</td>
<td>Good</td>
</tr>
<tr>
<td>COMMUNICATION</td>
<td>Good</td>
<td>Good</td>
<td>Worse</td>
<td>Excellent</td>
</tr>
<tr>
<td>ABILITIES</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

A comparison of Candidates 1, 2 and 4 following the criteria on the lower levels of the tree shows that the first candidate is worse than the other two. **Candidate Number 1** had low organisational abilities and was not as diligent as **Candidate Number 2**. **Candidate Number 2** had a worse evaluation at tests and test situations than **Candidate Number 1**. Although **Candidate Number 3** had excellent general knowledge, high energy and enthusiasm as well as formal documentation of foreign language skills, this candidate also had the worst evaluation grades; therefore, he could not be accepted as a candidate for future animator. **Candidate Number 4** had the most positive characteristics and one which was the worst: energy and enthusiasm.

The final evaluation of each candidate was as follows: Candidate Number 1 was acceptable, Candidates 2 and 4 were good for becoming animators and Candidate Number 3 was unacceptable; he was the worst candidate, leading in negative values in almost all areas.

_for final approval_, we made use of a selective analysis leading to selective explanation. We searched for the most visible strengths and weaknesses of single options. Table 8 shows this for all four candidates. We can be certain that Candidate Number 4 had excellent organisational abilities, personality and communication skills. He was especially good in the aspects of creativity, ingenuity, temperament, sense of humour, personal and professional honesty and sincerity. The only weakness was a lack of energy and enthusiasm.
Candidate Number 1 was good in abilities, energy, enthusiasm and sincerity. A bad point for Candidate Number 1 was a low consciousness of diligence.

Candidate Number 2 had a good personality, character, diligence, responsibility, energy and enthusiasm. He had bad organisational abilities, an unacceptable personality, was not creative, had an inappropriate temperament (choleric), no sense of humour; he had been caught in a lie at a similar job, had no sense of responsibility, and had bad abilities and bad communication skills.

Table 8: Selective explanation of evaluation of four candidates

<table>
<thead>
<tr>
<th>Candidate 1</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SINCERITY</td>
<td>better</td>
</tr>
<tr>
<td></td>
<td>ENERGY AND ENTHUSIASM</td>
<td>high</td>
</tr>
<tr>
<td></td>
<td>SKILLS</td>
<td>excellent</td>
</tr>
<tr>
<td></td>
<td>DILIGENCE</td>
<td>low</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Candidate 2</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PERSONALITY</td>
<td>good</td>
</tr>
<tr>
<td></td>
<td>CHARACTER</td>
<td>good</td>
</tr>
<tr>
<td></td>
<td>DILIGENCE</td>
<td>high</td>
</tr>
<tr>
<td></td>
<td>RESPONSIBILITY</td>
<td>high</td>
</tr>
<tr>
<td></td>
<td>ENERGY AND ENTHUSIASM</td>
<td>high</td>
</tr>
<tr>
<td></td>
<td>INGENUITY</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Candidate 3</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GENERAL KNOWLEDGE</td>
<td>excellent</td>
</tr>
<tr>
<td></td>
<td>ENERGY AND ENTHUSIASM</td>
<td>high</td>
</tr>
<tr>
<td></td>
<td>TEMPERAMENT</td>
<td>inadequate</td>
</tr>
<tr>
<td></td>
<td>CREATIVITY</td>
<td>bad</td>
</tr>
<tr>
<td></td>
<td>SENSE OF HUMOUR</td>
<td>small</td>
</tr>
<tr>
<td></td>
<td>HONESTY</td>
<td>unacceptable</td>
</tr>
<tr>
<td></td>
<td>RESPONSIBILITY</td>
<td>low</td>
</tr>
<tr>
<td></td>
<td>SINCERITY</td>
<td>worse</td>
</tr>
<tr>
<td></td>
<td>SKILLS</td>
<td>worse</td>
</tr>
<tr>
<td></td>
<td>COMM.SKILLS</td>
<td>worse</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Candidate 4</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ORG.ABILITIES.</td>
<td>Better</td>
</tr>
<tr>
<td></td>
<td>PERSONALITY</td>
<td>good</td>
</tr>
<tr>
<td></td>
<td>CHARACTER</td>
<td>good</td>
</tr>
<tr>
<td></td>
<td>CREATIVITY</td>
<td>excellent</td>
</tr>
<tr>
<td></td>
<td>INGENUITY</td>
<td>good</td>
</tr>
<tr>
<td></td>
<td>TEMPERAMENT</td>
<td>quite adequate</td>
</tr>
<tr>
<td></td>
<td>SENSE OF HUMOUR</td>
<td>high</td>
</tr>
<tr>
<td></td>
<td>HONESTY</td>
<td>good</td>
</tr>
<tr>
<td></td>
<td>SINCERITY</td>
<td>better</td>
</tr>
<tr>
<td></td>
<td>COMMUN. SKILLS</td>
<td>Excellent</td>
</tr>
<tr>
<td></td>
<td>ENERGY AND ENTHUSIASM</td>
<td>low</td>
</tr>
</tbody>
</table>
Conclusion

We analysed multi-attribute criteria of human resources selection with the DEX expert system. We defined the meaning of the problem, which occurs when we wish to make a selection of proper candidates for tourism animators. Therefore, we explained the problem of proper candidate selection with the goal of achieving better results. We defined the basic characteristics which every candidate should have. We described the criteria decision tree, single attributes, and decision rules. We used DEX as an expert system and defined the values of the chosen options and parameters which are the most important for defining the database. This key part of the paper was made and tested by a team of colleagues, each of them an expert in different areas in tourism. What follows is the application of the model in the reality of proper candidate selection for tourism animation.

The final result of this decision process is as follows: The most appropriate candidate is Number 4, who lacks sufficient energy and enthusiasm. Candidates 1 and 2 were also selected as future animation trainees. Candidate Number 1 is a bit worse than candidate Number 2. Both of them can significantly improve their skills with hard and serious work on a course. We did not select candidate Number 3, mainly because of a majority of bad characteristics, which could have had a strong impact on other candidates and animation work as well.

The above-mentioned decision-making problem required actual systematic solving which is one reason that the use of decision-making techniques was appropriate.

Literature

Bohanec, M. (1991), Introduction to DEX, (Ljubljana: Institute Josef Stefan)
Lipičnik, B. (1997) Človeški viri in ravnanje z njimi, (Ljubljana: Ekonomsko fakulteta)
Ravkin, R., (1989), Animacija u turizmu, (Ljubljana: Mladinska knjiga)
The position of tourism education at the Graduate school of Economics and Business in Zagreb compared to selected undergraduate tourism education in Croatia and abroad

1Oliver Kesar, University of Zagreb  
Dubravka Frajlić, University of Zagreb  
Nina Pološki, University of Zagreb

Abstract

At the beginning of the new millennium the tourism industry is, despite all internal and external influences, still one of the leading and fastest growing global economic activities.  
A progressive increase in tourism demand requires both a greater number of, and more competent, employees. Therefore, the education programs in tourism should be reconsidered and tailored to best suit the needs of the tourism industry.  
The aim of this research was to compare undergraduate programs in tourism at the Graduate School of Economics & Business (GSEB) in Zagreb with other Croatian programs in tourism, as well as the best tourism programs at a similar level abroad. The purpose of this comparison was to find similarities and differences among them in order to suggest improvements.  
The list of analyzed undergraduate tourism programs was based on an opinion survey of experts. International professionals and teaching staff in the field of tourism were asked to recommend five best undergraduate programs in tourism. The final analysis was made on a judgment sample of 19 universities (14 international and 5 Croatian).  
The comparison between undergraduate tourism programs at the GSEB and selected programs in Croatia and abroad showed that six out of eight of the most frequent subjects in Croatia and seven out of eleven of the most frequent subjects worldwide are part of the current GSEB curricula. In that sense, the GSEB in Zagreb, through its undergraduate programs in tourism, justifies its membership of the World Tourism Organization Education Council.  
However, because of the need for Croatia to adjust its education system to the Bologna Declaration during the next four years, some adjustments are required. One of the options is to follow the world trend of the generic or business orientation and specialization of undergraduate tourism programs.

Keywords: tourism, undergraduate education in tourism, study program structure

1 Oliver Kesar, Graduate School of Economics and Business - Zagreb, Trg J. F. Kennedy 6, 10000 Zagreb, Croatia, tel: 00385/1/238-3147, fax: 00385/1/2335-633, e-mail: okesar@efzg.hr
1. INTRODUCTION

At the beginning of the new millennium the tourism industry is, despite all internal and external influences, still one of the leading and fastest growing global economic activities. It is a widespread cross-cultural activity with exceptional impact on economies and societies.

The income generated by tourism in the form of export earnings is significant for many tourist receiving countries, generating some estimated $476 billion in 2000 (WTO, 2001). Beside export earnings, tourism is well-known as a multi-billion dollar investment industry of almost 690 million international tourist arrivals throughout the world in 2001 (WTO, 2002). It can be expected that total revenues in tourism worldwide will record significant growth in the next few decades and the number of accommodation facilities, transportation facilities, sport and recreation facilities, facilities for entertainment, etc. is going to increase as well.

Recently, tourism experts estimated that by 2020, the size of tourism demand will increase to 1.6 billion tourist arrivals. This means that tourism supply, in order to make the highest possible profit and keep the market in balance, must fully respond and make a greater effort to satisfy tourists' needs.

Moreover, tourism generates a lot of jobs directly involved in the process of satisfying tourists' needs and even more indirect ones in branches supporting the tourism industry. According to an estimate by the World Travel and Tourism Council, the travel industry provided jobs for some 192.2 million people around the world in 2000 (WTTC, 2002). This means that one in every 30 inhabitants on Earth works in tourism! Another source, the International Labour Organization, estimated that "some 207 million people worldwide work in the travel and tourism sector, equivalent to about 8% of global employment which is estimated at about 2.5 billion" (ILO, 2001).

Apart from the positive effects, some issues in tourism still need rethinking. For example, negative social, environmental and political impacts of mass tourism ask for the adoption of more responsible attitudes from all the parties involved. Consequently, the sustainable development of tourism resources (natural and human) has again become a key issue of global discussion.

Obviously, the human factor plays an important role in shaping the future orientation of tourism. This emphasizes the need for both more responsible behavior and more responsible education.

2. THE IMPORTANCE OF HUMAN RESOURCES AND THEIR EDUCATION IN TOURISM

The World Travel & Tourism Council reports that "travel and tourism depends on human resources for its success" (WTTC, 2002). Therefore, the success of "travel and tourism depends inextricably on the quality of the training and education of the people who deliver its services"(WTTC, 2002). Moreover, a projected progressive increase in tourism demand in the next two decades also puts an emphasis on education for tourism purposes.

The education system is responsible for providing the required quantity of workforce. Many institutions have already recognized that. According to Goeldner, Ritchie and McIntosh, many colleges and universities have added or expanded travel and tourism programs. Vocational schools have launched programs, trade associations have introduced education and certification programs, and private firms have opened travel schools (Goeld-
ner, Ritchie & McIntosh, 2000). For example, in the United Kingdom in 1972 there were 2 undergraduate and 2 postgraduate programs in tourism. Nineteen years later, in 1991, there were 12 undergraduate and 10 postgraduate programs in tourism. Finally, just 6 years afterwards, in 1997, the number of undergraduate programs increased 5 times (66 programs) and the number of postgraduate programs tripled (33 programs) (Airey & Johnson, 1999).

Of course, the problem is not only to ensure the needed quantity of workforce through available educational capacities (material and human). It is also necessary to motivate students to enroll in different tourism programs and educate themselves in that field. Finally, it is necessary to improve the quality of tourism programs.

Responsibility for the quality of tourism programs, and therefore human resources in tourism, falls not only to education institutions but also to tourism policy makers, as the TEP (Tourism Education Program) -TEI (Tourism Education Implementation) conceptual framework in Figure 1 shows:

*Figure 1 - The TEP-TEI conceptual framework (Amoah & Baum, 1997)*

Amoah and Baum illustrate that the desired policy and implementation process, in order to achieve efficient tourism education, should be based on a synergy of the tourism and education environment. That means that efficient cooperation between policy makers and educators in tourism would result in a suitable quantity and quality ratio of human resources.
3. OBJECTIVES OF THE RESEARCH

Due to the scope and fragmented structure of tourism, there are four main issues in tourism education (Dale & Robinson, 2001):

1) Questioning the standardization of the education in such a fragmented industry
2) Framing the core body of knowledge – Bryman (Bryman, 1999) and Dale and Robinson (Dale & Robinson, 2001) argue for the separation of domains in tourism education. For instance, Dale and Robinson divide the tourism education as follows: generic tourism degrees (tourism management, tourism studies), product/market tourism degrees (eco-tourism, adventure tourism, event tourism) and functional tourism degrees (tourism marketing, tourism planning).
3) Facilitating the comparability among programs
4) Assuring the quality of programs.

This research deals with the fourth issue, the issue of assuring the quality of tourism programs at the GSEB in Zagreb.

For that purpose, a comparison was made between undergraduate programs in tourism at the GSEB in Zagreb and selected domestic and international programs in tourism. The purpose of this comparison was to define basic similarities and differences among selected programs in order to suggest improvements.

4. METHODOLOGY

Since there are no official rankings of universities with program in tourism, as a first phase of the research, in order to define best undergraduate programs in tourism, an e-mail survey was conducted.

The questionnaire, consisting of only one question (the name and the rank of, in their opinion, the best five undergraduate programs in tourism), was sent to 420 e-mail addresses worldwide, to people who are actively involved in tourism, either in education or practice. From the 420 e-mails sent, 100 were not delivered, due to server problems. The opinions of the group of faculty members of the Department of Tourism at the GSEB in Zagreb were included.

The overall response rate was 10%. Although some authors argue for a high and fast response rate (some authors argue for a response rate of up to 20% (Jackson & DeCormier, 1999; Murphy, 1996; Rosner, 1996), or even more, up to 50% (ESOMAR, 1998), the experience in the area of e-mail surveys was considered. Namely, if an e-mail survey is considered as a specific type of mail survey, with the acceptable and referent response rate of 10-30% for business markets, and only up to 4% for consumer markets, the response rate of 10% is acceptable. This is also confirmed by the fact that the data received were consistent.

The sampling frame was all universities for which the necessary data on their program were published on the Internet. The judgment sample consisted of 19 universities chosen on the basis of experts' opinions. As Churchill and Nielsen point out: "... the key feature of judgment sampling is that elements are purposively selected. This selection may not be made on the basis that they are representative, but rather because they can offer the contribution sought...the sample elements are selected because it is believed that they are representative of the population of interest" (Churchill, Nielsen, 1995).
Concretely, from the list of 20 universities and business schools worldwide, the 14 highest ranked were analyzed, as well as all 5 Croatian universities and business schools with undergraduate programs in tourism.

This research is an exploratory one, with the preliminary aim of getting a deeper understanding of the problem or situation explored. It resulted in primarily qualitative interpretations and suggestions.

The selected universities and business schools worldwide, precisely their undergraduate programs in tourism, represent a kind of benchmark, a mark for comparison for the Croatian undergraduate programs in tourism, and especially a basis for understanding the position of the GSEB among them.

It is to be mentioned that, when comparing undergraduate programs, the specific area covered by the title of the subject was defined. That means that similar subjects, although named differently, were combined in the same category. Therefore, the accent was not on the specific subject names but rather on the syllabus covered.

The following universities and business schools were analyzed (Table 1):

*Table 1- The list of analyzed universities and business schools in Croatia and abroad*

<table>
<thead>
<tr>
<th>Croatia UNIVERSITY / BUSINESS SCHOOL</th>
<th>Abroad UNIVERSITY / BUSINESS SCHOOL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Faculty of Economics and Tourism “Dr. Mijo Mirković” – Pula</td>
<td>1. Clemson, Michigan State, USA</td>
</tr>
<tr>
<td>2. Faculty of Tourism and Hospitality Management – Opatija</td>
<td>2. Cornell University, USA</td>
</tr>
<tr>
<td>3. Faculty of Philosophy – Zadar</td>
<td>3. George Washington University, USA</td>
</tr>
<tr>
<td>4. Faculty of Economics – Split</td>
<td>4. Michigan State University, The School of Hospitality Business, USA</td>
</tr>
<tr>
<td>5. Faculty of Tourism and Foreign Trade – Dubrovnik</td>
<td>5. Purdue University and Indiana University, USA</td>
</tr>
<tr>
<td>6. Graduate School of Economics &amp; Business (GSEB) - Zagreb</td>
<td>6. Texas A&amp;M University, USA</td>
</tr>
<tr>
<td></td>
<td>7. University of Central Florida, USA</td>
</tr>
<tr>
<td></td>
<td>8. University of Hawaii, School of Travel Industry Management, USA</td>
</tr>
<tr>
<td></td>
<td>9. Virginia Tech University, USA</td>
</tr>
<tr>
<td></td>
<td>10. University of Calgary, Canada</td>
</tr>
<tr>
<td></td>
<td>11. University of Otago, New Zealand</td>
</tr>
<tr>
<td></td>
<td>12. Bournemouth University, UK</td>
</tr>
<tr>
<td></td>
<td>13. University of Surrey, School of Management Studies for the Service Sector, UK</td>
</tr>
<tr>
<td></td>
<td>14. Wirtschaftsuniversität Wien, Austria</td>
</tr>
</tbody>
</table>
5. RESEARCH RESULTS

The detailed analysis of undergraduate programs in tourism in Croatia and abroad raised many interesting topics for discussion about worldwide education in tourism.

As can be seen from Appendix 1, there is a total number of 45 different subjects in tourism in Croatia. 43 of these are present at five Croatian schools that have undergraduate programs in tourism and two more are taught at the GSEB in Zagreb, as a part of undergraduate programs in tourism.

For a small country like Croatia, with just 4 universities, such a variety of tourism subjects signifies a very developed and diversified undergraduate education in the field of tourism. Moreover, when the diversity of tourism subjects in Croatia is compared with the data about education in tourism at the 14 selected universities around the world, the conclusion is similar. As Appendix 2 shows, at 14 selected universities abroad, there are 84 different subjects.

The fact that education in tourism in Croatia is well-grown and very well spread is related to the Croatian economic and geographic reality. Croatia is a tourism receiving country, internationally well-known for its attractive tourism destinations. The Croatian part of the Adriatic Sea, a thousand islands, a beautiful coast and an old history are only some of the reasons that make Croatia a must-see.

5.1. Undergraduate tourism programs at the Graduate School of Economics and Business – Zagreb compared to undergraduate programs in tourism at other Croatian schools

Apart from the number of subjects in tourism taught at schools with undergraduate programs in tourism in Croatia (45), Appendix 1 leads to several conclusions and indicates some problems concerning the undergraduate education in tourism at the GSEB.

(1) Firstly, in Table 2, which shows the most frequently taught tourism subjects at five Croatian schools with undergraduate programs in tourism, it can be noticed that out of eight of the most frequent subjects at those schools, GSEB covers five.

<table>
<thead>
<tr>
<th>Tourism subjects</th>
<th>Frequency</th>
<th>Exis : (+) / not (-) at the GSEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Economics of tourism</td>
<td>4</td>
<td>+</td>
</tr>
<tr>
<td>2. Hospitality management</td>
<td>4</td>
<td>+</td>
</tr>
<tr>
<td>3. Travel agency business operations</td>
<td>4</td>
<td>+</td>
</tr>
<tr>
<td>4. Marketing in tourism</td>
<td>4 (+)*</td>
<td></td>
</tr>
<tr>
<td>5. Sociology in tourism</td>
<td>4</td>
<td>+</td>
</tr>
<tr>
<td>6. Economy and ecology</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>7. Law in tourism</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>8. Tourism geography</td>
<td>3</td>
<td>+</td>
</tr>
</tbody>
</table>

* The subject as such does not exist but other differently named subjects cover the curriculum.
One of the subjects in Table 2 – Marketing in tourism – does not exist as such at the GSEB, but students have two subjects relating to marketing in tourism instead – Market research in tourism and Promotion in tourism. As well as this, students become familiar with marketing basics during the second year of their studies, when they have (general) Marketing.

Consequently, it can be concluded that tourism education at the GSEB covers 6 out of 8 of the most frequent subjects. And, if it is assumed that the subjects that are the most frequent are those that are recognized as fundamental and crucial or most important for a complete and thorough education in tourism, the education in tourism at the GSEB is one of the best in Croatia. However, two of the most frequent subjects in tourism in Croatia are not covered by the tourism program in Zagreb – Ecology and Law in tourism. It is essential to mention that although some subjects as such do not exist at the GSEB, this does not mean that students do not have the opportunity to learn about them. The majority of subjects cover connected areas as well. For example, almost every tourism subject also covers the law of its specific tourism area.

Further investigation revealed that both of those subjects were taught at the GSEB until a few years ago. The reason why those subjects were excluded from the tourism programs was the lack of faculty interested and specialized in those fields. These subjects are of extreme importance for a thorough education in tourism and thus the decision about abandoning those two subjects should be reconsidered.

(2) Another conclusion and potential problem is that all tourism subjects taught at the GSEB are basic or fundamental subjects. Except for quite a lot of electives related to marketing, there are rather few specialized subjects. When compared with other undergraduate programs in tourism in Croatia, students at the GSEB do not have the chance to specialize in a particular field. This issue could be approached from two sides. One would say that this is not exactly a problem, because students should study fundamentals and then, while working, specialize in a specific area. Others would say that students, when they enroll in the tourism program, already know which field they want to work or specialize in. That is why subjects like Hotel Management, Tour Operators Business Operations, Tourism Intermediaries Management, all taught at the GSEB, are just some of the specialized subjects that could be of a great interest to the students. Other specialized subjects present at some other undergraduate programs in tourism in Croatia and that could be interesting for students are connected to fields such as food and diet, catering, recreation activities, animation in tourism, nautical tourism, hotel marketing and similar.

(3) Additionally, Appendix 1 reveals the difference between business operations and management. Although management experts would say that business operations are just one part of management, especially nowadays when organizations are becoming flatter, decentralized, and when all employees are at least their own managers, an operational distinction exists. When discussing business operations we think of prescribed procedures for performing one’s job. But, when talking about management, we think about all those planning, organizing, leading, human resource management and control activities that have to be carried out so that those who are doing the job are guided and supported.

The final conclusion about the quality and quantity of undergraduate tourism programs at the GSEB would be that, compared to tourism education in Croatia in general, they are adequate but could be further improved and enriched with several specialized electives.
5.2. Undergraduate tourism programs at the Graduate School of Economics & Business – Zagreb compared to undergraduate programs in tourism at selected universities worldwide

As already mentioned, at fourteen selected worldwide undergraduate programs in tourism, 84 different subjects exist. Out of those 84 subjects, the following eleven are the most frequent – Table 3.

Table 3 - Most frequent tourism subjects taught at fourteen selected worldwide undergraduate programs in tourism

<table>
<thead>
<tr>
<th>Tourism subjects</th>
<th>Frequency</th>
<th>Ex sts (+) / not (-) at the GSEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tourism and hospitality law</td>
<td>9</td>
<td>-</td>
</tr>
<tr>
<td>2. Event management</td>
<td>8</td>
<td>-</td>
</tr>
<tr>
<td>3. Food and beverage management</td>
<td>8</td>
<td>-</td>
</tr>
<tr>
<td>4. Tourism marketing</td>
<td>7 (+)*</td>
<td></td>
</tr>
<tr>
<td>5. Hospitality financial management</td>
<td>6 (+)*</td>
<td></td>
</tr>
<tr>
<td>6. Lodging management</td>
<td>6</td>
<td>-</td>
</tr>
<tr>
<td>7. Tourism research, planning and developmen</td>
<td>6</td>
<td>+</td>
</tr>
<tr>
<td>8. Transportation management</td>
<td>6</td>
<td>+</td>
</tr>
<tr>
<td>9. Economics of tourism</td>
<td>5</td>
<td>+</td>
</tr>
<tr>
<td>10. Introduction to tourism and hospitality management</td>
<td>5 (+)*</td>
<td></td>
</tr>
<tr>
<td>11. Tourism</td>
<td>5</td>
<td>+</td>
</tr>
</tbody>
</table>

* The subject as such does not exist but other differently named subjects cover the curriculum.

Table 3 shows that of the eleven most frequent tourism subjects, four exist as such at the GSEB and another three are covered by other differently named subjects. As already explained, Tourism Marketing as a subject is split into two subjects at the GSEB. The program of Hospitality Financial Management is part of Hospitality Management. The subject frequently taught at fourteen selected worldwide undergraduate programs in tourism – Introduction to Tourism and Hospitality Management – is at the GSEB split into two subjects – Tourism and Hospitality Management.

Thus, seven of eleven tourism subjects that are the most frequent around the world in the best tourism undergraduate programs exist as well at the GSEB. Taking into account that those selected undergraduate programs are suggested as the best in the world and are geographically situated in the world tourism leading-countries, tourism programs at the GSEB are of a high quality.

However, the absence of the remaining four subjects should be rethought. As we already mentioned, when comparing tourism programs at the GSEB with other tourism programs in Croatia, Tourism and Hospitality Law definitely deserves more attention.
Specialized subjects such as Event Management, Food and Beverage Management and Lodging Management are very frequent as a consequence of their popularity. Namely, education systems at all those selected universities differ from the Croatian one. There, the existence or absence of a subject depends upon the quality and popularity of a subject and the professor that teaches it. Moreover, Food and Beverage Management and Lodging Management are inevitable areas in tourism. On the other hand, Event Management is today one of the most popular topics in tourism, thanks to the worldwide development and strengthening of the service sector.

Appendix 2 also reveals the following things:

1) Universities specialize in specific segments of tourism, such as food and beverage, hospitality, the hotel industry, international tourism, leisure, recreation, etc.

2) Every major field of tourism, such as those numbered in the previous number, is divided into many subjects that cover specific problems in that field. For example, the field of hospitality is treated through numerous functionally divided subjects: Hospitality Accounting, Hospitality Development and Planning, Hospitality Facilities Design, Hospitality Financial Management, Hospitality Human Resource Management, etc. The same stands as well for international tourism and sport and recreation tourism.

3) Many subjects cover narrow specific fields in tourism such as the casino industry, the golf industry, nautical tourism, timesharing, vacation ownership, theme parks, attractions etc.

4) The influence of information technology on our lives in general and especially on business is evident in tourism as well. Subjects that deal with information technology in tourism such as Hospitality Information Systems, Information Technology for Hospitality Managers, Technology in Leisure and Tourism and similar are not rare.

The overall conclusion from these data is that universities usually specialize and develop their competitive advantages through focusing on a particular field of tourism. Therefore, connected with the fact that Croatia should adjust its education system according to the Bologna Declaration in several years, this should mean that in the near future the competition in tourism education in this region is going to be stronger. Thus, the tourism program at the GSEB should develop its distinguished competitive advantages.

6. DISCUSSION

Several conclusions about the position and quality of the undergraduate tourism education programs at the GSEB can be drawn from the above analysis:

- Tourism programs at the GSEB thoroughly cover all fundamental knowledge in tourism.
- A wide spectrum of subjects (generic and business oriented) included in the existing programs defines the GSEB curricula as the only program that can educate policy makers for tourism.
- Because of the importance of the tourism sector for the Croatian economy and the need for specialized human resource in tourism, a diversification of existing programs should be considered. The advice is to organize two differently oriented programs. One would be a generic program (i.e. Tourism Management or Tourism Studies), and the other one could specialize in a specific business area (i.e. Congress/Convention Tourism), based on existing human and know-how resources. According to the same principle, other educational centers for tourism in Croatia could also specialize in specific fields. For example, Hotel Management in Opatija, Nautical Tourism in Split, Cultural/Heritage Tourism in Zadar or Dubrovnik and similar.
• Instead of the previously mentioned two-domain approach (generic and business oriented programs), a group of additional electives specializing in specific fields of tourism could supplement the generic program. In this way, students would at the same time have a thorough generic and business oriented tourism education. With the provision of additional electives, not only Congress Tourism but other specialized fields, such as Event Management or City, Rural or Spa Tourism, could be covered.

• In order to reduce the gap between the demand and supply of well-educated and trained professionals in tourism, it is highly recommended that cooperation between the education system and businesses be improved.

• The cooperation between the government and the education system should also be much closer. In order to ensure more efficient education, WTTC recommends governments to (WTTC, 2002):
  1. Take a leadership role in the development of human resources.
  2. Facilitate urgent investment in education and training.
  3. Bridge the gap between education and the industry – liaison groups of education and industry representatives will help public education authorities develop the skills required by the industry.
  4. Promote travel and tourism careers in order to stimulate interest in the industry as a source of employment.
  5. Devise “Intelligent Employment Regulations” – regulations formulated in the light of a human resource strategy and aimed at fostering the growth of travel and tourism as a means of creating jobs and raising economic performance.
  6. Develop comprehensive national/regional strategies – make education, training and immigration an integral part of national/regional strategies to help the international competitiveness of the travel and tourism sector.

7. CONCLUSION

Although tourism is a relatively new phenomenon (only 150 years from its beginnings), it is one of the most diversified and widespread human activities. Tourism is also the industry upon which the further economic development of Croatia depends.

Since tourism is a service-based industry, the importance of human resources in tourism is huge. This reveals the importance of a proper education system. Facing dynamic changes in education at university level, institutions and individuals throughout the world are forced to behave proactively. Education programs should not only respond to, but also try to predict, trends in the tourism industry and changes in tourist behavior, and consequently improve and adjust their curricula.

The comparison between undergraduate tourism programs at the GSEB and selected programs in Croatia and abroad show that six out of eight of the most frequent subjects in Croatia and seven out of the eleven most frequent subjects worldwide are part of the current GSEB curricula. In that sense, the GSEB in Zagreb, through its undergraduate programs in tourism justifies its membership of the World Tourism Organization Education Council.

However, because Croatia should adjust its education system according to the Bologna Declaration over the next four years, some adjustments are required. One of the options is to follow the world trend of the generic and business orientation and of the specialization of undergraduate tourism programs.
## Appendix 1 - Tourism subjects and their frequency at 5 Croatian schools with undergraduate programs in tourism compared to Graduate School of Economics & Business - Zagreb

<table>
<thead>
<tr>
<th>Subjects</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Animation in tourism</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>2. Business culture</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>3. Categorization of properties in the hotel industry</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>4. Communications in tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>5. Culture in tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>6. Design in the hotel industry</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>7. Economics of tourism</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>8. Economy and ecology</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>9. Food and diet</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>10. History of tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>11. Hospitality business operations</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>12. Hospitality management</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>13. Hotel business operations</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>14. Hotel controlling</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>15. Hotel entrepreneurship</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>16. Hotel marketing</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>17. Hygiene in tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>18. International economic relations and tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>19. Law in tourism</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>20. Market research for tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>21. Marketing in tourism</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>22. Medicines in tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>23. Maritime tourism</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>24. Organisation of recreation activities</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>25. Organisation of tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>26. Planning, construction and ecology in the hotel industry</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>27. Promotion in tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>28. Quality management in tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>29. Services marketing</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>30. Small and medium sized catering companies</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>31. Sociology in tourism</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>32. Special interest tourism</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Tour operators business operations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>33. Tourism</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>34. Tourism development</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>35. Tourism geography</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Tourism in special conditions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>36. Tourism intermediaries management</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>37. Tourism management</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>38. Tourism policy</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>39. Tourism resources value analysis</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>40. Tourist destination management</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>41. Transport and tourism</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>42. Travel agency business operations</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>43. Travel agency marketing and management</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>9</td>
<td>29</td>
<td>16</td>
<td>16</td>
<td>9</td>
<td>73</td>
</tr>
</tbody>
</table>

1. Faculty of Economics and Tourism "Dr. Mijo Misković" - Pula (General area: Tourism)
2. Faculty for Hotel and Tourism Management - Opatija (General area: Hospitality, Hotel management, Tourism management)
3. Faculty of Philosophy - Zadar (General area: Culture and Tourism)
4. Faculty of Economics - Split (General area: Tourism)
5. Faculty of Tourism and Foreign Trade - Dubrovnik (General area: Tourism)
## Appendix 2 - Tourism subjects and their frequency at 14 selected universities with undergraduate programs in tourism compared to Graduate School of Economics & Business - Zagreb

<table>
<thead>
<tr>
<th>Subjects</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
<th>13</th>
<th>14</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Behavioral studies in tourism</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>2. Channels of distribution in tourism</td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>3. Competitive strategies for the hospitality industry</td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>4. Creating and managing for service excellence</td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>5. Culture in tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>6. Economics of tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>7. Entrepreneurship in tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>8. Event management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>9. Financial management for travel industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>10. Financial management in tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>11. Food and beverage management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>12. Food and beverage marketing strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>13. Foodservice facilities design</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>14. Franchising in the hospitality industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td>1</td>
</tr>
<tr>
<td>15. Global tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>16. Hospitality accounting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>17. Hospitality development and planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>18. Hospitality facilities design</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>19. Hospitality facilities operations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>20. Hospitality financial management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>21. Hospitality human resources management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>22. Hospitality industry research</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>23. Hospitality information systems</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>24. Hospitality management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>25. Hospitality marketing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>26. Hospitality real estate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>27. Hospitality research methods</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>28. Hospitality risk management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>29. Hospitality sales</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>30. Hotel development analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>31. Hotel development analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>32. Hotel development contracts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>33. Hotel planning and interior design</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>34. Information technology for hospitality managers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>35. Internal control in hospitality operations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>36. International hospitality management and development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>37. International lodging development and management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>38. International studies in tourism, parks and recreation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>39. International tourism destinations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>40. International tourism management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>41. International tourism operations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>42. Introduction to casino industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>43. Introduction to tourism and hospitality management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>44. Leisure, travel and tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>45. Lodging management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>46. Managing quality in hospitality businesses</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>47. Marketing communications in tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>48. Marketing planning for hotels</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Marketing research for tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>49. Methods of recreation research</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>50. Natural tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Subject</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>TOTAL</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>----</td>
<td>----</td>
<td>----</td>
<td>----</td>
<td>----</td>
<td>-------</td>
</tr>
<tr>
<td>51. Negotiations in the hospitality industry</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>52. Principles of tourism development and operations</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>53. Principles of travel industry marketing</td>
<td></td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>54. Recreation administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55. Recreation and leisure environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>56. Recreation and tourism economics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57. Resort and facilities management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>58. Restaurant revenue management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>59. Room division management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60. Service marketing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>61. Special interest tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>62. Sport and recreation marketing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>63. Supervision in the hospitality industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>64. Sustainable development and the global industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>65. Technology in leisure and tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>66. Theme park and attraction management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour operators business operations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>67. Tourism analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>68. Tourism analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>69. Tourism and heritage management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>70. Tourism and hospitality law</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>71. Tourism and recreation business enterprises</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>72. Tourism geography</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourism in special conditions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>73. Tourism intermediaries management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>74. Tourism management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>75. Tourist marketing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>76. Tourism markets and supply</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>77. Tourism research, planning and development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>78. Tourism system</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>79. Training in the hospitality industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>80. Transportation management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>81. Travel agency management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>82. Travel career development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>83. Travel management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>84. Vacation ownership resort management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>7</td>
<td>34</td>
<td>6</td>
<td>21</td>
<td>14</td>
<td>18</td>
<td>26</td>
<td>5</td>
<td>14</td>
<td>12</td>
<td>13</td>
<td>18</td>
<td>20</td>
<td>10</td>
<td>190</td>
</tr>
</tbody>
</table>

1. Clemson, Michigan State, USA (General area: Parks, recreation and tourism management)
2. Cornell University, USA (General area: Marketing and tourism related area)
3. George Washington University, USA (General area: Tourism and hospitality management)
4. Michigan State University, The School of Hospitality Business, USA (General area: Commercial recreation and tourism)
5. Purdue University (General area: Food service and lodging supervision)
   and Indiana University, USA (General area: Tourism, conventions and event management)
6. Texas A&M University, USA (General area: Tourism resource management)
7. University of Central Florida, USA (General area: Hospitality management)
8. University of Hawaii, School of Travel Industry Management, USA (General area: Hospitality management,
   Tourism management & Transportation management) - Only the data on core subjects were available electronically.
9. Virginia Tech University, USA (General area: Hospitality and tourism management)
10. University of Calgary, Canada (General area: Hotel and resort management)
11. University of Otago, New Zealand (General area: Tourism)
12. Brunel University, UK (General area: Tourism & International Hospitality Management)
13. University of Surrey, School of Management Studies for the Service Sector, UK (General area: International hospitality management)
14. Wirtschaftsuniversität Wien, Austria (General area: Tourism)
REFERENCES


Rosner, H., (1996), 'Will e-mail become j-mail', Brandweek, (March): 30.


Education of tourist workers
in the republic of Macedonia

Gabriela Rakicevik, Ph.D., Associate Professor*

Abstract

The significance of human resources comes to view especially in tourism. In many cases, the key to the successful working of the hospitality organization is through maintaining and promoting the quality of the human resources. This can be achieved by permanent education, by different programs of skilled training, by collaborating with well-known and recognized world hospitality chains, etc. Education represents a type of investment in human capital, with the aim of increasing the productivity of human beings. Permanent education is imperative at all education levels. Managers in tourism who constantly extend their knowledge achieve better working results. This means that education and knowledge are dominant forms of the management force, especially top management.

Key words: education, human resources, tourism, management

* Gabriela Rakicevik, Ph.D., ul.Jane Sandanski 32, 6000 Ohrid, R. Macedonia,
tel:+389 70 30 80 11, e-mail:gabriela@mt.net.mk
Introduction

The education of human resources represents a characteristic of the modern work of catering organizations. For a long time it has been pointed out in theory that education is one of the major factors in the whole of social development. Structural changes in socio-economic life are also reflected in the educational policy. That is why the reforms in education in the Republic of Macedonia basically have the same characteristics as in the other countries which are undergoing the transition period.

The educational policy in the field of tourism represents an integral part of the tourist policy. Education is a form of investment in human capital, and has as its aim to increase the productivity of the human being.

Education of skilled staff for the needs of tourism and catering is carried out in appropriate educational institutions. In the Republic of Macedonia these are the secondary schools and the Faculty for Tourism and Hospitality. After completing secondary school, students are awarded diplomas of a Catering Worker, Hotel Worker and Tourist Worker.

After completing, full-time or part-time studies at the Faculty of Tourism and Hospitality, students are awarded diplomas of Tourist Manager such as: two years studies in the Gastronomy Course VI and four years studies in the Tourism Course VII (skilled training). Besides this, there are opportunities to achieve a diploma of a Tourist Guide after completing a specialized course. Postgraduate studies are also offered.

1. Education of managers in catering capacities in the Republic of Macedonia

Research has been carried out to study the factual situation of the educational structure of the managerial staff in the catering capacities in the Republic of Macedonia. The research was conducted in 29 catering capacities of the higher categories (A and B). The population from which the sample was drawn is the managerial structures of all managerial levels (top management, middle management and lower management). According to the available data the sample represents a larger part of the whole, that is, 92.1% (SG, R. Macedonia, 1999), and is considered that it satisfies two main prerequisites: to be representative and appropriate.

From all the catering capacities included in the sample, the respondents were members of management teams, in other words, the entire management structure of all three levels were covered. The number of managers varies from one hotel to another, depending on the size and managerial structure of the hotel.

The differentiation of the respondents according to the level of education was done according to a frame of 5 groups: secondary education, college degree (two years of training), University Degree, Master’s Degree and Doctoral Degree. After the detailed analysis of data, it can be concluded that the respondents belong to one of three categories, in other words in the frame of the sample there is not even one with a Master’s Degree or Doctoral Degree. This means that what follows is an analysis on the basis of the first three groups: secondary education, college degree and university degree.
Diagram 1. The share of respondents according to education.

The diagram showing the differentiation of the respondents according to their education can be seen in Diagram 1.

According to this criterion it can be seen that the managers who completed secondary education are dominant. Their number is 54 or 37.50% of all the respondents.

The group of managers with a university degree is 34.72% or 50 respondents.

The group of managers who have a college degree is 40 or 27.78%. This kind of proportion between the respondents is not advantageous. This means that in the Republic of Macedonia managers of catering capacities are managers who do not have an adequate level of education. The large number of managers who have completed secondary education would not be so disturbing if they were managers of the third managerial level. The fact is that in most cases they are on the first or second managerial level. Even if they had longer work experience they would still not be able to manage without an adequate level of education.

Besides that, another fact for concern is that a large number of managers, irrespective of their level of education, have had an education in inappropriate skills (secondary education for dental technician, two-year teacher trainees, university degree in philosophy, university degree in veterinary science, and so on.).

2. The educational system and the quality of knowledge of tourist workers

The respondents were given the statement: The existing educational system gives sufficient and qualitative knowledge to tourist workers (a lot, enough, little)?

The group results from the gathered data are presented in Diagram 2.
Diagram 2. The quality of knowledge of tourist workers.

The largest number of managers in hospitality enterprises chose the second attributive category. That means that 63.89% or 2/3 of the total number of managers think that the existing educational system gives sufficient knowledge to tourist workers.

The share of managers who selected the third attributive category is 23.61%. Bearing in mind the fact that the second and third category prevails with a total share of 87.5%, special attention should be drawn because there is something wrong.

It could be noted that the existing and even the negative position regarding education has its own background. First of all, it could be the result of the inadequate educational structure of the existing hospitality managers. In that sense they consider that, even if they were given a diploma of skilled education, that would not be of great help. From another angle, this could be the result the dominant role of theoretical tuition. This consideration is supported by the fact that there is no initiative for permanent skilled improvement and education for the human resources of the hospitality sector, neither from the educational institutions, nor from the hospitality subjects.

Besides that, it should be noted that there are a number of managers who consider that the existing educational system gives sufficient and qualitative knowledge to the hospitality human resources. Their share is 12.50%.

3. The respondents’ opinion about education and about the quality of the existing educational system

It is considered that there are differences in the opinions of managers with different levels of education concerning the quality of the existing educational system.

The presented data (Table 1 and Diagram 3) show that the highest number of frequency exists in the second attributive category within all the respondents, independently of the level of education. The respondents who have completed secondary education and those with a university degree have the same frequency in this attributive category, with a total share of 47.22% of the total number of respondents. The managers who have completed secondary school have a share of 16.67%.

The opinions of the managers who have completed secondary school and those who have a university degree are equal in terms of the first attributive category, with a share of 2.78% of the total number of respondents.
The lowest frequency from the third attributive category exists within the managers who have completed a two-year course, with a share of 4.17% of the total number of respondents.

Table 1. The education of the managers and the quality of knowledge of the tourist workers

<table>
<thead>
<tr>
<th>The existing educational system gives enough qualitative knowledge to the tourist workers</th>
<th>Secondary school</th>
<th>College degree</th>
<th>University Degree</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>A lot</td>
<td>4</td>
<td>10</td>
<td>4</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>2.78%</td>
<td>6.94%</td>
<td>2.78%</td>
<td></td>
</tr>
<tr>
<td>Enough</td>
<td>34</td>
<td>24</td>
<td>34</td>
<td>92</td>
</tr>
<tr>
<td></td>
<td>34.50%</td>
<td>25.56%</td>
<td>31.94%</td>
<td></td>
</tr>
<tr>
<td>Little</td>
<td>16</td>
<td>6</td>
<td>12</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td>12.75%</td>
<td>9.44%</td>
<td>11.81%</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>54</td>
<td>40</td>
<td>50</td>
<td>144</td>
</tr>
</tbody>
</table>

Diagram 3. The quality of knowledge of the tourist staff according to education.

² Personal research carried out in 1999
Conclusion

Among the employed staff there are significant differences regarding the level of education. Regarding skilled-practical training, tourism is a catering branch with an inadequate educational structure.

In most cases, the key to the successful working of the catering organization is through maintaining and improving the quality of the human resources. This could be achieved by permanent education, by different programs for skilled education, by cooperation with well-known and recognized world catering chains, using their experience and so on. Although the skilled abilities of human resources are of fundamental significance for success in working, there still does not exist any initiative for the permanent skilled improvement and education of tourist staff.

The results from the research have shown that the existing situation in the work of catering and tourism is the result of irregular managerial structures, the inadequate educational structure of the existing managers and the absence of a connection between theory and practice. This means that it is necessary to create a bridge between research work and practice, that is, theoretical knowledge on the basis of empirical research to be carried out in practice. It is considered that one of the contributing factors of the existing situation is the undefined title of the catering enterprises and the unsettled owner’s relations.

References:

Statistical Yearbook of Republic of Macedonia, 1999

Privatization of higher education: Jordan’s success story

Khalid Magablih, Yarmouk University

Abstract

The study entitled "Privatization of Higher Education: Jordan’s Success Story" aims to present the successful Jordanian experience in licensing the private sector to invest in the field of higher education, with a focus on the role of private institutions in introducing tourism higher education in the kingdom.

It was in the summer of 1985 that the idea of privatization or licensing national higher education was born during the first conference of Jordanians staying abroad. This was an attempt to give a chance to their children to pursue their higher education in Jordan.

Privatization of higher education helps attracting many students from the region and at the same time decreasing the number of Jordanians studying abroad, which has both economic and social dimensions.

The number of national universities has rapidly increased during the last decade. The number of students has increased as well from (89,415) in 1996 to (126,212) in 2000.

In 2000, non-Jordanian students amounted to about (10.8%) of the whole number of students in our universities, and to about (30%) of the total number of students in our national universities.

The success story of privatizing higher education in Jordan is becoming a model to be followed in the region. Many neighboring countries are attempting to copy Jordan’s experience; however the credibility of higher education in Jordan could hardly be compared to any other country in the region.

Private institutions were the initiators and are still the leaders in Tourism and Hospitality Education, supplying our market as well as the neighboring countries with a pool of qualified graduates who could help lead the growth and prosperity of the industry.

To continue in the leading position in the region, more attention should be paid to the quality of our graduates and the needs of the local and regional markets. More budgets should be allocated to research and development and more job security should be given to teachers.

1 Department of Anthropology & Tourism, Institute of Archaeology and Anthropology, Yarmouk University, Irbid/Jordan
E-mail: magablih@yahoo.com, magablih@hotmail.com,
Tel: 00962-02-7271100 (Office), 00962-079-831244 (Mobile), Fax:00962-2-7274725
1) Jordan; an Overview

Located in the heart of the Middle East and the Arab world, the Hashemite Kingdom of Jordan is the crossroad of the Middle East and of three continents: Europe, Asia, and Africa. It is bordered on the north by Syria, on the east by Iraq and Saudi Arabia, on the south by Saudi Arabia and the Gulf of Aqaba- its only sea outlet that gives access to the Red Sea. Its western boundary is the Dead Sea, Palestine and Israel.

The population which numbered about 5 millions in the year 2000 is predominantly Arab in origin and Muslim in religion (95%). The remaining (5%) are Christians and other ethnic groups such as Circassians and Chichans. Population growth is among the highest in the world (3.9%) annually. \(^{(1)}\)

More than 50% of the population are less than 20 years old, and more than 70% are less than 30 years old. \(^{(2)}\) Ninety-five percent (95%) of those who pass Higher Secondary Examination continue their higher education.

Jordan is a unitary state having a government system that is constitutional, monarchical, and democratic in form. The constitution guarantees freedom of religious belief, speech, press, association, and private property.

Arabic is the official language. English is widely spoken, and also some French.

2) The Tourism Industry in Jordan

While international tourism traffic reached 698.3 million tourists in the year 2000, the share of the Middle East was only 2.8% of international travel. \(^{(3)}\) Jordan’s share of the Middle East \(^{(4)}\) region amounted to about 13%.

In Jordan, tourism comes second only to the remittances of Jordanians working abroad, and contributes to about 11% of GDP in the country, employing more than 21,000 people directly in its different activities and more than 60,000 people indirectly. \(^{(5)}\)

The tourism industry in Jordan has experienced rapid growth during the past few years as could be seen from Table 1.

Among the main strengths of the tourism industry in Jordan are: the image of the royal family, product diversity, excellent climate, hospitable people, high security in a region of crisis, and the quality accommodation facilities and services.

3) Higher Education in Jordan

The Ministry of Higher Education aims at the planning and direct supervision of higher education. In addition, it holds responsibility for coordinating and supervising the study and stay of non-Jordanian students in Jordan, as well as the accreditation of higher education.

National universities are expected to pass both general accreditation standards regarding the facilities, buildings, libraries, and the specific accreditation measures such as the ratio of teachers to students, and the structure of the study plan.

This is an attempt to control the quality of higher education in the kingdom as well as the reputation of the country in this regard.
From Table 2 it can be seen that non-Jordanian students constitute about 12% of the whole number of students in Jordanian universities during the period 1996-2000. Thirty percent of non-Jordanians are female students, as compared to 45% female students of the whole number of students in Jordanian universities.

The total number of enrolled students increased by 41% on average. Female students increased by 63% and non-Jordanian students increased by 24.4% during the same period.

Table 1. Tourism Statistics during 1990-2000

<table>
<thead>
<tr>
<th>Particular</th>
<th>1990</th>
<th>2000</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Classified Hotels</td>
<td>109</td>
<td>278</td>
<td>155%</td>
</tr>
<tr>
<td>No. of Unclassified Hotels</td>
<td>111</td>
<td>174</td>
<td>57%</td>
</tr>
<tr>
<td>Travel Agencies</td>
<td>212</td>
<td>397</td>
<td>87%</td>
</tr>
<tr>
<td>Rent-a-Car CO’s</td>
<td>54</td>
<td>285</td>
<td>428%</td>
</tr>
<tr>
<td>Tourist Shops</td>
<td>107</td>
<td>173</td>
<td>62%</td>
</tr>
<tr>
<td>Tourist Guides</td>
<td>111</td>
<td>685</td>
<td>517%</td>
</tr>
<tr>
<td>Tourist Buses</td>
<td>128</td>
<td>297</td>
<td>132%</td>
</tr>
<tr>
<td>Tourist restaurants</td>
<td>N.A</td>
<td>370</td>
<td></td>
</tr>
<tr>
<td>Tourism Receipts (JD Million)</td>
<td>339.8</td>
<td>512.4</td>
<td>51%</td>
</tr>
<tr>
<td>Direct Employment</td>
<td>8252</td>
<td>21515</td>
<td>161%</td>
</tr>
<tr>
<td>No. of Tourist Arrivals (Million)</td>
<td>0.577</td>
<td>1.25</td>
<td>117%</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism and Antiquities, Information and Statistics Section, 2000

Table 2. Indicators of Higher Education in Jordan (1996-2000)

<table>
<thead>
<tr>
<th>Year/No. of students</th>
<th>Gender</th>
<th>Enrolled Students</th>
<th>Total Non- Jordanians</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>B.Sc./B.A.</td>
<td>Graduate</td>
</tr>
<tr>
<td>1996/1997</td>
<td>Total</td>
<td>83506</td>
<td>5909</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>35752</td>
<td>1612</td>
</tr>
<tr>
<td>1997/1998</td>
<td>Total</td>
<td>88267</td>
<td>5850</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>39442</td>
<td>1647</td>
</tr>
<tr>
<td>1998/1999</td>
<td>Total</td>
<td>96949</td>
<td>6143</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>44717</td>
<td>1856</td>
</tr>
<tr>
<td>1999/2000</td>
<td>Total</td>
<td>105813</td>
<td>6670</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>50715</td>
<td>2189</td>
</tr>
<tr>
<td>2000/2001</td>
<td>Total</td>
<td>118657</td>
<td>7555</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>58385</td>
<td>2536</td>
</tr>
</tbody>
</table>

From Table 3, it is clear that the share of national universities is about 46.5% of the total number of non-Jordanian students during the period 1997-2001. All non-Jordanian students in national universities are at undergraduate level, as national universities are still not licensed to conduct graduate studies.

Table 3. Non-Jordanian Students (1997-2001)

<table>
<thead>
<tr>
<th>Year</th>
<th>Government Univ.</th>
<th>National Univ.</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997</td>
<td>5282</td>
<td>4532</td>
<td>5654</td>
</tr>
<tr>
<td>1998</td>
<td>5782</td>
<td>5057</td>
<td>5594</td>
</tr>
<tr>
<td>1999</td>
<td>6435</td>
<td>5593</td>
<td>5583</td>
</tr>
<tr>
<td>2000</td>
<td>6873</td>
<td>6066</td>
<td>5455</td>
</tr>
<tr>
<td>2001</td>
<td>7861</td>
<td>6990</td>
<td>5738</td>
</tr>
<tr>
<td>Average</td>
<td>6446.6</td>
<td>5647.6</td>
<td>5604.8</td>
</tr>
<tr>
<td>Percentage</td>
<td>53.49%</td>
<td>46.86%</td>
<td>46.51%</td>
</tr>
</tbody>
</table>


4) Private Education in Jordan

In the summer of 1985 the idea of private education in Jordan was conceived during the first meeting of Jordanians abroad in Amman. The idea was proposed of private investment in the education sector to give an opportunity to their children, who did not get a chance to be admitted in the government universities, or could not get the preferred specialization area. It was proposed that this would be better for their children than traveling abroad and being exposed to different cultures and political and social systems, with which they might not be able to cope.

The real birth of the national universities in Jordan was in the academic year 1990/1991 when some national universities started admitting students in limited specialization areas, with the risk of failure being borne by many Jordanians and non-Jordanians.

In addition to their educational and cultural role, national universities have an economic role through their visible contribution to the national economy and lessening the impact of the two main problems in the country: poverty and unemployment.

In the year 1999-2000, universities in Jordan employed 9,567 people in administrative jobs and 4,602 in academic jobs. This may be perceived as a humble number, but if we consider that the average family size in Jordan is 5 persons, then this will have a great direct and indirect impact on both economic and social aspects. (6)

Private universities have a prominent role in attracting non-Jordanians as well as Jordanians abroad, and at the same time contributing to lessening the number of Jordanian students studying abroad.

So, Jordan is a pioneer in privatizing higher education in the region, at the time that neighboring countries are still formulating their higher education policies, and so, many are trying to copy the success story Jordan has experienced in this regard.
Table 4. Number of Students in National Universities (1992-1999)

<table>
<thead>
<tr>
<th>Year</th>
<th>No. of students</th>
</tr>
</thead>
<tbody>
<tr>
<td>92/93</td>
<td>7003</td>
</tr>
<tr>
<td>93/94</td>
<td>11319</td>
</tr>
<tr>
<td>94/95</td>
<td>16107</td>
</tr>
<tr>
<td>95/96</td>
<td>24864</td>
</tr>
<tr>
<td>96/97</td>
<td>30583</td>
</tr>
<tr>
<td>97/98</td>
<td>32851</td>
</tr>
<tr>
<td>98/99</td>
<td>35198</td>
</tr>
<tr>
<td>99/200</td>
<td>34644</td>
</tr>
</tbody>
</table>


On average, the number of students enrolled in national universities in Jordan has increased by 395% during the period 1992-1999, or on an average rate of 3,455 students per annum, taking into consideration that the number of enrolled students in national universities was stagnant to a certain extent during the past few years as a result of the control measures exerted by the Ministry of Higher Education regarding the number of students in each university as compared to the available facilities and teachers, as well as the limited number of new licenses in this regard. In addition, even government universities are required by law to abide by the accreditation measures set for national universities, although in practice they do not. Besides, they have recently started programs such as the international, parallel, and evening programs that are drawing in a great number of students who are attracted by the well-established name and reputation of government universities and who, in turn, are appreciated by the local and Arab markets.

During the period 1994-1999, the number of non-Jordanian students at undergraduate level increased by 45.6% on average or by 10,056 student annually.

Palestine (41.3%), Malaysia (13.7%), Yemen (11.6%), Syria (6.8%), Oman (5%), Iraq (4%), Saudi Arabia (3.2%) made up about 85.6% of the non-Jordanian students of 71 nationalities in Jordan. It should be mentioned that 93.4% of non-Jordanian students are at undergraduate level.

Magablih (2002) (7) reported that the main factors that influence the selection decision of the non-Jordanian students are the reputation of the university, family willingness, and availability of specialization. Awareness about the university comes mainly from friends, educational service agencies, and print media. The average expenditure of a foreign student in Jordan is about (JD 5761.22) per annum, mainly on university fees, housing and F&B. 36.4% stay in furnished apartments, 21.4% stay in unfurnished apartments and 21% in student hostels. 57% recommend studying in Jordan to friends, while 18.7% are undecided.

Government universities host about 70% of the total number of students in Jordan. Non-Jordanians amount to about 30% of the total number of students in national universities.


Table (5) Number of Jordanian students abroad

<table>
<thead>
<tr>
<th>Year</th>
<th>No. of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>66427</td>
</tr>
<tr>
<td>1985</td>
<td>35898</td>
</tr>
<tr>
<td>1990</td>
<td>23378</td>
</tr>
<tr>
<td>1995</td>
<td>21581</td>
</tr>
<tr>
<td>1998</td>
<td>21408</td>
</tr>
</tbody>
</table>


There is a visible decrease of 210% in the number of Jordanian students studying abroad or an average rate of 2,370 students during the period 1980-1998. National universities contributed a lot to the decreasing number of Jordanians studying in higher education institutions abroad, which helps control the leakage of hard currency.

National universities have many positive aspects, among them are:

1. Help control the leakage and travel of many Jordanians to study abroad with the chances of being exposed to different cultures and styles of life.
2. Save the economy of the country large amounts of money that would have been spent abroad in the absence of private universities.
3. Make available opportunities for Jordanians abroad to further educate their children, who did not get the chance to be enrolled in government universities.
4. Attract many non-Jordanian students, especially from the neighboring Arab countries who are well impressed by the education standards in the country.
5. Create job opportunities for academics, administrative staff, technicians, and others.
6. Act as a source of income to the government through licensing, accreditation, income tax, etc.

However, they still have a great scope for development. Among the main problems they recently have that could affect their future and goodwill are:

a. Most national universities lack a strategic view and instead focus on short-term profits.
b. There is a need to separate the ownership and administration of national universities.
c. Research and development is among the lowest priorities of national universities.
d. Less job security among employees—especially academics, could adversely affect the quality of national higher education in the country.

5) Tourism Higher Education in Jordan

To cope with the rapid development and the continuous and ever-changing needs and wants of tourists, a need has emerged to supply the tourist activities in Jordan and the neighboring countries with a pool of qualified candidates who could lead the development and prosperity of the tourism sector, both in quality and numbers for the different career opportunities created in the tourism sector.

This is the role of the educational and training programs in the field of tourism that could match manpower demand and supply in both number and quality.
Table 6. Students enrolled in Tourism and Hotel Management programs by university and gender (2001).

<table>
<thead>
<tr>
<th>University</th>
<th>Specialization</th>
<th>Total</th>
<th>Female</th>
<th>% of Female Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied Science University</td>
<td>Hotel Management</td>
<td>260</td>
<td>19</td>
<td>7.31</td>
</tr>
<tr>
<td>Philadelphia University</td>
<td>Tourism and Hotel management</td>
<td>246</td>
<td>9</td>
<td>3.66</td>
</tr>
<tr>
<td>Zyoounah University</td>
<td>Tourism and Hotel management</td>
<td>281</td>
<td>50</td>
<td>17.79</td>
</tr>
<tr>
<td>Amman National University</td>
<td>Tourism and Hotel management</td>
<td>108</td>
<td>27</td>
<td>25.00</td>
</tr>
<tr>
<td>Irbid National University</td>
<td>Tourism and Hotel Management</td>
<td>71</td>
<td>2</td>
<td>2.81</td>
</tr>
<tr>
<td>Hashemite University</td>
<td>Tourism Guiding</td>
<td>51</td>
<td>18</td>
<td>35.29</td>
</tr>
<tr>
<td>Yarmouk University</td>
<td>M.A. in Tourism Management</td>
<td>52</td>
<td>12</td>
<td>23.08</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>1069</td>
<td>137</td>
<td>12.82</td>
</tr>
</tbody>
</table>

Source: registration Department of universities, 2001.

National universities started undergraduate Tourism and Hospitality programs in 1990/1991, as initiators and leaders in this field. Before that, tourism and hospitality education was limited to an intermediate diploma (2-year program after Higher Secondary Education), secondary hotel education, and vocational education that supply the market with limited skills, ignoring the needs of the industry for supervisory and managerial jobs.

The tourism and hospitality fields are among the main domains that still attract many students, even if the university fees are still more expensive than other similar programs.

Government universities recently started thinking about the necessity of this specialization area, so we now find that three of them are offering or preparing to offer undergraduate programs in tourism and hospitality, namely Hashemite University, Balqa Applied University and Al Hussein University. It is important in this regard to appreciate the role of Yarmouk University that started a graduate program in tourism leading to a master degree in tourism, which is the only graduate program in tourism and hospitality in Jordan.

6) Prospects of Higher Education in Tourism

In order to preserve its leading role in tourism higher education, national universities in Jordan need to consider a few points:

- Study plans need to be revised and updated to cope with the needs of the industry.
- The fancy names of specialization areas such as ‘Tourism and Hotel Management’ should be avoided to qualify students with better and more in-depth knowledge and skills in a specific field, instead of being “Jack of all trades, master of none”.
- Students should be selected in a way that guarantees we have the best possible input to supply the market with leading manpower which is well qualified in terms of the particular needs of the industry.
- Foreign languages and computer skills must be enhanced among students to help the industry compete in the local and regional markets.
- The practical part of the program as well as training in the field should be given more weight through training labs on the university campus or through agreements with tourism and hotel enterprises.
• Female students should be given incentives to encourage them to enroll in this promising specialization. The share of female employees is about 7.5% of the total number of employees in the tourism industry.
• More awareness should be created among society about the industry and its way of functioning in order to improve its image.
• More cooperation and interaction should take place between educational institutions and tourism activities in the form of continuous meetings and seminars to get necessary feedback and collaboration.
• Educational institutions must take the lead in supporting and carrying out research projects in the tourism industry as part of their social responsibility.
• A detailed study of manpower needs should be conducted in cooperation with the different parties involved to create a balance between labor demand and supply in this field.

**Conclusion**

1. The privatization of higher education in Jordan is successful from both the economic and social aspect.
2. Non-Jordanian students in Jordanian universities amount to about 12% of the total number of enrolled students.
3. National universities host about 46.5% of the non-Jordanian students in the country.
4. The number of Jordanian students abroad has declined by 210% during the period 1980-1998.
5. The number of students in national universities has increased by 395% during the period 1992-1999.
6. National universities need to have a strategic view, an administration that is separate from ownership, and contribute more to research and development.
7. The number of students in tourism higher education has increased from a few students in the year 1991/1992 to more than a thousand in the year 2001. The share of female students is about 13%.
8. In tourism higher education, there is still a need to give more consideration to computer skills, foreign languages, practical and field training, selection criteria of new candidates, as well as to encourage more female participation.

**Footnotes**

2. Ibid.
5. Ibid.
The postgraduate programme in tourism of the Greek Open University: characteristic features and implementation

Paris Tsartas¹, University of the Aegean
Gerasimos Zacharatos, University of the Aegean

Abstract

Our paper consists of three parts:

In the first part, we examine the particular characteristics and problems of the Tourism Education System in Greece, combined with the demands of the employment market on the one hand and the tourism development models on the other. Particular emphasis is given to the analysis of the problems, of the deficiencies and of the necessary updating of the various educational levels, either by changing the existing study programs or by adapting new ones.

In the second part, we analyse the philosophy and the main objectives of the formulation of a postgraduate programme (Master's) in Tourism Enterprises Management offered by the Greek Open University, using the methodology of Open and Distance Learning. We begin by examining the basic educational axes, which are adapted in the planning and the writing of the educational literature, and we then analyse the main organisational parameters of the programme.

In the third part, we draw the basic conclusions after the first two years of the implementation of this postgraduate programme in a series of matters, such as: selected educational procedure, generated educational philosophy, organising the curriculum, technology, etc.

¹ Paris Tsartas,
University of the Aegean, 8 Michalon str., 82100 Chios – GREECE
Tel.: +30.271.35315, Fax: +30.271.35399, e-mail: ptsar@aegean.gr
Introduction

In the first part of our paper we shall analyse the special features of the Tourism Education System and its connection to the tourism labour market. Attention will be given to the characteristic features, problems and priorities in the process of upgrading tourism studies. In the second part we shall examine the philosophy and the basic aims of the postgraduate programme in Tourist Enterprises Management offered by the Greek Open University (G.O.U.). Emphasis will be given to the methodology, planning and organisation of this programme. In the third part we shall register our first assessments and positions on the programme (which has been running for almost two years now) and more specifically on a number of issues such as: education processes and students, distance learning methodology, communication between students and professors, books and other scientific material.

A. The Tourism Education System in Greece and its connection to the tourism labour market

On the basis of international experience, Tourism Education Systems usually consist of different educational grades, which aim at being functionally linked to each other. In this way, each grade corresponds to a different level, programme and duration of studies, as well as to different educational targets. Thus, the student may choose from secondary education, which usually lasts as long as the equivalent of the "lyceum" (in the case of Greece, three years) or higher education (i.e. after the completion of the secondary education). Furthermore, in most developed and tourist countries, one can find organised programmes of postgraduate studies (at Master’s or PhD level). Additionally, tourism education systems usually combine a set of training, education and specialisation programmes of shorter duration, dealing with specific issues and subjects that are usually demanded from the labour market.

The main features of the Greek tourism education system differ from the above typical model in terms of both structure and special weight of each educational grade, as several studies have shown (for example, Kasimati K. et al., 1995, Zacharatos G. et al., 1995, Tsartas P., 2000).

- Secondary education is offered mainly by STEs (Tourism Education Schools) and the TEE (Technical Professional Schools). Both constitute state schools (STE were the first to operate in Greece, and they offer post-high school programmes of one or two years). At this level, we also find some private schools, which operate in the form of colleges and are usually linked to foreign universities.

- Tertiary post-lyceum education (not higher) is offered by public IEKs (Institutes of Professional Training) and by private IEKs, which are often linked to foreign universities and professional schools. Studies last one to two years.

- Post-lyceum higher education is divided into: (a) the one offered by the Tourism Enterprises Schools of the TEI (Technical Professional Institutions) and the two schools of STE (ASTER on the island of Rhodes, and ASTEAN in Ag. Nicolaos on Crete) and (b) the one offered by Universities, namely the Business Administration Department of the University of the Aegean and the Business Administration Department “Tourism” under the direction of the Patras University (“Services” direction).

- Lastly, three postgraduate programmes have started operating in the past three years (University of the Aegean, University of Piraeus, and the Greek Open University), leading to Master’s or PhD degrees.
Next to the Tourism Education System, one can find private and public KEKs (Centres of Professional Training) operating throughout the country and offering short-term training programmes in various issues.

The problems in the organisation and functioning of the Tourism Education System in Greece were studied previously (for example, Tsartas P., 2000, Kasimati K. et al., 1995, Peroni G. et al., 1992).

- All curricula have to change and adjust to new realities. Most of them are characterised as “traditional”, especially with regard to secondary and higher education.
- Most of the specialisations offered (excluding universities) are limited to hotels and tourism agencies. As noted in international research and studies, there is a lack of specialisations related to tourism development, programming and management, as well as specialisations related to the new requirements of the market, e.g. alternative and special forms of tourism, animation, etc.
- The largest share of people employed in tourism schools does not have a satisfactory degree of formal qualifications and is not trained in the new realities of modern tourist education.
- There is considerable overlapping in the programmes of studies, which leads to an increasingly large amount of graduates who, although they come from different education grades, end up claiming similar working positions.
- The absorption of graduates from all grades is very low compared to the total number of persons employed in the tourism sector. According to recent calculations, the total number of persons employed in the tourism sector amounts to 600,000 persons, while, if we also include those indirectly employed in the sector, the above figure could increase to one million.
- In all grades of tourism education, practical exercise effected in the context of the programme is not sufficient in terms of time and organisation.
- There are no institutionally defined communication channels from one grade to the other which allow the movement of students – through a system of selection or examinations – from a lower to a higher grade.

The characteristic features and the problems of Tourism Education are directly linked, in a two-way relationship, to the reality of the labour market, especially in a tourist country, such as Greece. More specifically, the following parameters have been mentioned (Zacharatos G. et al., 1995, Tsartas P., 2000, Peroni G. et al., 1992) in the relationship between the labour market and the education system.

- From the total of different types of people employed in the Tourist Sector, only a mere 30% has been educated or trained in Tourism. The remainder has either been educated in another discipline or has practical experience in Tourism.
- The impressive increase in tourism in the 1980-2000 period has led to a considerable increase in demand for Tourism Education in various areas of the country. This demand comes either from businessmen and people employed in the Sector who have not received any tourism education, or from people working in the field, with low qualifications, who wish to have better employment prospects.
- The large majority of institutional and professional associations of tourism businessmen in the country realise that the upgrading of tourism studies is the only solution to improve the quality of services rendered and to produce a competitive tourist product.
In this way, the need to generally improve and upgrade tourist studies in Greece has become apparent. The main priorities in this process of upgrading, since the mid-90s, have been the following:

- Elaboration of an institutional framework allowing, under certain terms and conditions, access from one grade to another.
- Upgrading of university studies through the implementation of postgraduate programmes that would respond to specific needs and cover shortages in the labour market, research and education. These programmes lead to Master’s degrees in Tourism Management, Tourism Enterprises Management and Tourism Planning and Policy. More specifically, the postgraduate programme offered by the Greek Open University in Tourism Enterprises Management covers, due to the use of distance learning methodologies, the needs of people working or residing in tourist regions.

B. Philosophy and Basic Aims of the Postgraduate Programme offered by the Greek Open University in Tourism Enterprises Management

The main objective of the programme is to offer high level, specialised knowledge in Tourism and Tourist Enterprises Management (see Annex 1). The key axis in the educational philosophy of the programme, as Tsartas (1999) and G.O.U. (2000) reported, is the combination of the use of Open and Distance Learning (ODL) methodology with the scientific content of the four thematic units which make up the programme.

1. Planning of a multileveled programme of studies, focusing on Tourist Management

The programme aims at the systematic analysis of Management used by different branches, entities and enterprises of the Greek Tourist Sector (hotels, agencies, associations for the development and organisation of tourism, catering and recreation enterprises, and enterprises active in special and alternative forms of tourism). This way, efforts have been made so that the programme could respond to the new realities of the planning, production and distribution of different tourist products offered by the country in the past 10 years.

2. The operational link of Tourist Management with Marketing

Quite often, when developing educational material, postgraduate programmes on tourist management do not sufficiently emphasise tourist marketing. In the specific programme, it was decided that, due to the lack of a graduate programme in tourism, it would be better for the student who completes his/her studies to have good knowledge of both the process of organising and managing the tourist product and the processes of promoting and selling it. In this context, tourist marketing is a separate thematic unit (the fourth), directly linked to the other three, which place an emphasis on management.

3. The gradual acquisition of a common scientific language by the students through the educational material

One of the main problems of many postgraduate programmes – not only the ones in tourism – is the fact that students come from various educational backgrounds. In this specific case, there were two main problems that we had to overcome: (a) a high share of students (40-50%) selected to follow the programme did not have a first degree in management or tourism and (b) those who had studied tourism in their first degree had very limited knowledge in certain areas. To overcome these problems, we chose to gradually
introduce students to management and the institutional operation of tourism through the educational manuals of the first unit (general principles of management, tourism legislation, organisation and operation of tourism entities and agencies). In this way, students acquire a common corpus of knowledge or improve their previous knowledge and are then able to better understand the educational material of the postgraduate programme.

4. Supply of educational material to the students using ODL methodologies

On the basis of international practice, and also taking into consideration the relatively small volume of scientific bibliography on Tourism in Greece, the solution adopted consists of the elaboration of autonomous educational manuals, one for each individual issue included in each thematic unit. ODL methodology is used, giving great emphasis to the link between theory and practice through exercises which allow the student to understand the educational material. Furthermore, these manuals take the place – to a considerable degree – of the traditional way of teaching which brings together the professor and the student.

Apart from these manuals – which make use of the latest bibliography – students also get: (a) a number of “parallel texts”, which comprise articles or extracts of books that the professor considers important and (b) set-books, which are books that contribute to a better understanding of the exercises and educational manuals.

5. Constructing a programme characterised by flexibility in terms of attendance

The basic principle of universities offering studies using ODL methodologies is flexibility, which in turn, is determined to a large degree by the students themselves. This principle applies also to the specific programme, where a large share of students belongs to the following groups: (a) employed persons, (b) persons who completed their studies many years ago, (c) people residing far from the large urban centres (usually in tourist regions) and (d) people with family obligations. On the basis of the above, a student may:

- Complete all four thematic units in two years (two units per year) and receive his/her Master’s degree
- Complete the four thematic units gradually, according to his/her professional and family obligations or financial constraints.
- Complete only a part of the thematic units and receive a certificate of postgraduate training.

These different alternatives allow students to organise their studies in a way to suit their needs.

6. The systematic training of the programme’s writers and professors in ODL methodologies

This constituted a key element to the success of the planning and operation of the postgraduate programme. Difficulties encountered concerned writers, rather than professors (we refer to the case of professors who have not worked as writers). The issues on which most of such difficulties arose concerned:

- Insufficient understanding of ODL methodologies at the initial stage of writing the manuals.
- Difficulty in adopting a scientific way of writing with characteristics different from the traditional scientific way of writing. This difficulty proved quite considerable, even in the case of quite experienced writers.
- Writing of activities and exercises as well as their systematic inclusion in the texts.

The hardest part in this case was the innovative nature of this element of the educational material.

Finally, after systematic and laborious efforts, the working group that was responsible for the writing of educational manuals overcame all these difficulties.

C. First assessment on the operation so far of the postgraduate programme in Tourism Studies offered by the Greek Open University

The programme has entered its second phase of operation, with the selection of the second group of students to attend it. In this context, we believe that certain remarks should be made on its first phase of operation. These remarks have a wider scientific interest and contribute to drawing useful conclusions on the community of tourism education. Our interest thus focuses on:

1. Educational process and students

In general, the educational process is judged to be satisfactory. The considerable increase in demand for the programme has led to a satisfactory average as regards the students’ educational features. A large share of students consists of people working in the tourist sector and people residing in tourist regions wishing to specialise in tourism. Students have attended the regular Group Consultative Meetings (GCM) and their dissertations have been of a high standard.

Employed people and those who have family obligations face the most difficulties. Most dropouts come from these two groups, although the percentages of those who have abandoned their studies are lower than the international average (10-15% against 25-30%). Out of these people, those who selected, from the beginning, two thematic units encountered even more difficulties.

The development of an infrastructure, namely libraries, and the promotion of research would contribute to the further improvement of the educational process.

2. Distance learning methodology

The acceptance and practical use of the ODL methodologies have been more satisfactory than initially estimated, for both students and professors. As far as students are concerned, the problems encountered had to do with:
- Difficulty in adopting a critical approach in writing the dissertations.
- Gaps stemming from the non-systematic study of the educational material, which constitutes a basic parameter in the correct application of the method.
- Some students have not respected the deadlines.

As regards the professors, most problems concerned their efforts to keep a very strict timetable in the process of correcting and marking the four dissertations. These dissertations constitute a prerequisite for the successful completion of each of the thematic units.

3. Educational manuals

According to the students, the educational material offered until now (manuals, parallel texts and set-books) is judged to be understandable and scientifically sufficient. Furthermore, the multi-disciplinary dimension of the manuals has received positive comments and
the same applies to the use of many examples and case studies, which have been combined with recent bibliography.

Some students encountered a few problems concerning the volume of manuals to be studied, in combination with the strict timetable. These problems where heightened in the case of employed persons who registered in two thematic units at the same time.

4. Student – professor communication

The ODL methodology is based in a communication system, which is structured in two axes. The first concerns the GCM, which in the case of the Greek Open University are held four times in the course of each thematic unit (this number has now increased by one). The second axis is the systematic personal communication of the students with their professors (by phone, fax or e-mail).

As regards the postgraduate programme in tourism, both students and professors realised very soon the need to have more GCMs, since they contribute directly to solving problems, understanding the educational material better, and enhancing the communication among students. As regards the personal communication, students tend to prefer the exchange of e-mail messages.

In conclusion, the postgraduate programme in Tourist Enterprises Management offered by the Greek Open University is developing satisfactorily, using the innovative methodology of Open and Distance Learning and covering significant educational needs, mainly of people working in the tourist sector or residing in tourist areas. Furthermore, it contributes to an increase in the number of employees who hold postgraduate degrees and are specialised in tourism – a sector which lacks executives with high qualifications.

ANNEX

The structure of the programme

1st year of studies

1st thematic unit

General principles of management, Tourist Legislation and Organisation of Employers’ and Collective Entities for Tourism

• General principles of management
• Tourism Legislation
• Organisation and operation of organisations and entities dealing with tourism

2nd thematic unit

The Tourist sector

• Tourist economy and organisation of tourist travels
• Development and environment in tourism
• Policy and sociology of tourist development
• Information technology and tourism
2nd year of studies

3rd thematic unit
Management of tourism and tourist enterprises
- Introduction in tourism management and tourist enterprises management
- Management of hotels and of catering and recreation enterprises
- Tour operators and tourist agencies management
- Management of special and alternative forms of tourism
- Management of entities and organisations
- Big events: the case of the Olympic Games

4th thematic unit
Tourist marketing of entities, organisations and enterprises
- Tourism marketing
- Principles and philosophy of national and regional marketing schemes
- Advertisements, public relations and promotion of sales in tourism
- Tour operators and tourist agencies marketing

In order to receive the Master’s degree, students have to complete all four thematic units and write their dissertation.

LIST OF REFERENCES


Zacharatos G., Kritikos Al., Tsartas P. (1995) Comparison of Educational Programmes and procedures to certify qualifications in the EU countries, in order to demonstrate the professional specialisations in the tourism sector, Planet SA-Integration Ltd, Volume B.
Tourism education and training in schools –
What Israeli students think of it?

Alon Gelbman∗, Safed Regional College, Israel

Abstract

Education and training for tourism were found by researchers to be among the most important factors for the success of tourism, because of the industry’s personnel-intensive nature and because of factors such as the great importance of the quality of service and of high professional levels of the employees. Although researchers note that tourism education and training should begin in school, little has been written about tourism in schools.

The aim of this study is to explore the attitudes of high school students learning tourism towards their studies in the tourism track in Israel. The research method included collection of data from a questionnaire investigating the attitudes of students in the tourism track and analysing these data.

The study's major findings are that students express positive attitudes towards their studies in the tourism track. They like the subject, which is attractive to them because of the interest they find in it; it achieves most of its aims, and contributes to them both in terms of an academic basis and a vocational basis.

Among the implications arising from the study, it appears that the positive attitudes of the students towards their studies in the tourism track indicate great potential for the development of tourism in schools and expansion of the number of students enrolled in the track.

Keywords: tourism education, students, attitudes, curriculum, Israel.

∗ Dr. Alon Gelbman P.O. box 115, Giv’at-Avni, 15227, Israel
Telephone and Fax number: +972-4-6779030 Email: mot56@zahav.net.il
Introduction

Education and training for tourism have been found by researchers to be among the most important factors contributing to success in tourism. This can be explained by the personnel-intensive nature of the industry and by other factors such as the importance of quality service and of high professional levels among employees (Kusluvan & Kusluvan, 2000; Singh, 1997; Cooper, 1991; Go, 1991; Marland & Store, 1991; Jafari & Ritchie, 1981). Studies also indicate a substantial correlation between positive attitudes among the local populace towards tourists, and the development and success of the tourism industry (Chalker, 1994; Mansfeld, 1992; Gunn, 1988). This attitude can be nurtured through education. Researchers also note that tourism education and training should begin in school (Cooper, 1991; Go, 1991; Singh, 1997; Gelbman, 2001), but Little has been written on tourism education in school.

Education for tourism includes a broad range of subjects, reflecting the interdisciplinary nature of tourism (Go, 1991). These include subjects like: leisure studies, travel, means of transportation, tourism management and marketing, tourism and the environment, urban tourism and rural tourism. Such subjects are taught in schools, colleges and universities in countries around the world. Training for tourism includes professional certificate-granting courses and preparation for taking one’s place in actual work in the branch, and it is offered together with or parallel to studies in academic institutions or in training institutions organised by the industry or the state. Types of training in tourism vary greatly, encompassing vocations such as travel agents, tour operators, hotel management and hotel culinary arts. In practice, it is difficult to separate education and training, because in tourism they are interdependent and integrated academically in vocational training institutions (Gelbman, 2001).

The content of tourism degree courses has been a subject of consideration and debate for as long as tourism has been studied at the degree level (Airey & Johnson, 1999, p. 229). The principles and content matter of the curriculum for degree studies have an effect as they filter down to Israeli schools since the professional committee on tourism in the Ministry of Education, which is the supreme authority for deciding on curricular matters, is led by representatives of academia (Gelbman, 2001). Similarly, all learning materials must be under the scrutiny and counselling of academic advisers (Ministry of Education, 2000). Various researchers have expressed their opinions about the debate and its prominent subjects. In the debate over the disciplinary nature of tourism, researchers see tourism as multidisciplinary rather than as an independent discipline (Jafari & Ritchie, 1981; Gunn, 1987, 1991; Tribe, 1997).

In the debate over the need for a core body of knowledge for tourism studies, researchers are of the opinion that defining the subjects that constitute the core body of knowledge for tourism is important and can contribute to defining the subject, its independence, its accreditation and even its harmonisation. At the same time, however, some researchers fear that such a core body of knowledge would prevent the subject from developing dynamically in new directions (Jaspers, 1987; Cooper, Scales & Westlake, 1992; Koh, 1994; Middleton & Ladkin, 1996; Tribe, 1997; Airey & Johnson, 1999). In the debate about the relations between and integration of education and vocational training in tourism, various researchers note that the issue is sometimes problematic, but nevertheless they see it as an essential part of the curriculum and ways must be found to implement it through co-operation between the education system and industry (Koh, 1994; Wells, 1996; Cooper & Shepherd, 1997).
Tourism curricula are closely tied to the education system in Israel since high school education in the country is under state control. Curricula are set by the Ministry of Education and students are tested in uniform national matriculation exams (Dror & Liberman, 1997). Studies in the tourism track differ from other high school subjects, which are usually based on clearly defined academic disciplines from the natural or social sciences or the humanities. Tourism combines academic studies with vocational-technological training within a multidisciplinary framework (Ministry of Education and Culture, 1997, p. 2).

Tourism education as a national mission has gained considerable attention. In the 1990s, as the tourism branch in Israel changed, expanded and developed, courses in tourism appeared in universities and college catalogues for the first time as minors within other study programmes, such as geography, Land of Israel studies and management. Similarly, the variety and quantity of courses for professional training in tourism increased tremendously, at the initiative of various public, private or industrial institutions. The new courses were in stark contrast to vocational courses offered in the past, mainly by the Ministry of Labour or Tourism. The new courses were adapted to the changing needs of the branch, dealing with areas such as hotel marketing, hospitality and rural tourism (Ministry of Tourism, 1995). The new atmosphere began to affect the schools as well.

Tourism education in Israeli schools began in the early 1980s as part of vocational training in high schools (specialisation as travel agents or reception clerks in hotels), combined with academic studies, mainly compulsory matriculation subjects (such as Mathematics, English, Literature). But the tourism track took root in very few schools (only 15 in the whole country). The big awakening that began in the early 1990s was actually triggered by the reform of the vocational education system instituted by the Ministry of Education, which turned vocational education into “technological education”. Curricula were revamped to reflect those in academic high schools, with the addition of subjects taught for vocational training and for certification (Yunai, 1992). The reform raised the prestige of technological education, among them tourism. Since the middle 1990s, demand has been growing to open more tourism tracks in high schools. This, too, may be the result of growing interest in the subject in universities, colleges and professional training institutions. In 1998 tourism was taught in 42 high schools in Israel. Of the supreme goals formulated by the Ministry of Education for the tourism track, the following are of note: increasing youngsters’ awareness of the importance of the tourism industry, providing a scholastic, academic basis for students in interdisciplinary subjects, nurturing students imbued with technological skills suited to the tourism branch, and the possibility of joining the tourism industry more easily (Ministry of Education and Culture, 1997, pp. 1-2). These and other goals are well suited both to the industry’s national needs, as noted earlier, and to the need for tourism education and training as recommended by researchers – in the schools (Jafari & Ritchie, 1981; Cooper, 1991; Go, 1991; Marland & Store, 1991; Singh, 1997).

Studies conducted among students have shown that their opinion is similar to that of supervisors and experts. Moreover, the views of students are invaluable since they have first-hand familiarity with the school reality that no one else has (Abraham, 1975). Students’ attitudes towards their studies can have a great effect on the success and image of a given subject as well as on its further development in the school. When students are satisfied with a study track they recommend it to their friends and acquaintances which can lead to the further growth and development of the studies in the school. This is especially true in the case of tourism, an elective subject whose continued existence in the school depends on sufficient student demand. Because of the increasing competition among the growing number of elective subjects being added to high school offerings, tourism, like its competitors,
needs to maintain a positive image and be as attractive as possible. Curriculum developers have many options open to them, and taking learners' perceptions and preferences into consideration can help raise the level of a programme’s success (Lewy, 1990).

The literature for the behavioural sciences and psychology contains a number of studies about attitudes (Ajzen, 1988, 1993; Eagly & Chaiken, 1993) but no definition of attitude can be found that is shared by all. A number of common general characteristics exist from which "attitudes" can be seen as intentions to evaluate reality positively or negatively and a tendency to express these evaluations in cognitive, affective and behavioural responses. Studies usually indicate a close correspondence between attitude components and behaviour, therefore, learning about attitudes can help to predict behaviour.

In light of the above, the aim of this study is to explore the attitudes of students learning in the tourism track towards their studies in the tourism track. Focussing on the following main research questions: 1. What are the students’ attitudes towards the importance of tourism as a subject, and what is the extent of satisfaction they feel about them? 2. Why are students choosing to study tourism? 3. What are the attitudes of the students towards the aims of the tourism curricula as stated by The Ministry of Education?

The research method included collection of data from a questionnaire investigating the attitudes of students in the tourism track and analysing these data. The students’ questionnaire was distributed in 1998 to all students in their final year of studies (twelfth grade) in the tourism track in high schools in Israel, a total of 420 students. Of these, 279 students, 66.4 percent of the population, returned the completed forms. Twelfth grade students, who have studied tourism for two years, have already been exposed to most of subjects in the curriculum. The distribution of the student population by gender shows 203 girls, constituting 72.7% of the study population, and 76 boys, constituting 27.3% of the study population. In the other words, there is a distinct preponderance of girls. No significant differences were found between the responses of the boys and the girls to questions in the study questionnaire.

**Students' attitudes**

The findings about the students’ attitudes towards the importance of tourism as a subject and about the extent of satisfaction they feel about studying tourism are presenting in Table 1.

Students were found to feel it important to study tourism: they like the subject, the tourism lessons are interesting and, in addition, they are satisfied with their choice of subject. Since the population participating in the study is twelfth grade students in their third and final year of tourism studies, it would appear that satisfaction with their choice indicates that the studies did not disappoint them. Perhaps these positive attitudes and satisfaction are also related to the fact that tourism studies in high schools in Israel are electives and the students chose these classes of their own free will, unlike the compulsory subjects set down by the Ministry of Education.

The factor cited by the majority of the students as the main reason for their choice of tourism studies is that the subject seemed interesting to them (Table 2).

However, it is important to remember the age of the students when they chose the tourism track - about 15. According to Lisk (1968), many adolescents tend to deny the influence of external factors on their decisions, such as recommendations of friends or family, as
also appeared in this study (Table 2). It may also be that elements related to self-image affect their response to the question of their choice of vocation at this age.

The fact remains that most of the students stated that they chose the tourism track because of their interest in the subject. While their attitude was subjective and may have been influenced, as noted, by factors related to personality development in adolescence, it is still important to emphasise that the subjective attitude that the students chose to express to their friends and to those around them was positive. This attitude shows that the tourism profession has the potential to fill a central place in high school curricula, since students enrolled in the track enjoy their studies and derive satisfaction from them. This interest in the profession can contribute to tourism’s positive image and to the further expansion of the subject in the school. Furthermore, as noted, the students are satisfied with their choice of the tourism track. They like learning tourism and the lessons interest them, even in their third and final year of studies (Table 1). Therefore, it seems reasonable to assume that they will express positive attitudes about interest in the subject in the school and in the nearby surroundings. This expression of interest in the subject is also important because children and adults learn well if the subject interests them. For this reason, curriculum planners should try to discover what the target population really wants and likes (Lewy, 1990).

An additional element mentioned extensively by the students is the vocational diploma and matriculation certificate that graduates receive (Table 1). However, the students referred to this subject more positively as an isolated factor and not in relation to other subjects. This contrasts with their choice of tourism because of their interest in the subject, as explained above (Table 2). It appears that, despite the great importance of matriculation certificates and certification diplomas, interest in the subject constitutes a more basic and prevailing factor in choice of subject. These findings are, in fact, less contradictory than complementary. Interest in a subject is an immediate prerequisite for choosing and learning it. Receiving certification and matriculation diplomas are the final result of the learning process that spans three years and students find it difficult to project what will come later, in the form of useful diplomas.

In an attempt to examine the findings about the effect of professional training on students’ decisions to study tourism, within the training-education debate, it should be remembered that researchers see the relationship between education and training in tourism as both problematic but mutually essential to the curriculum. They also recommend finding ways to ensure ongoing co-operation between the education system and industry (Koh, 1994; Wells, 1996; Cooper & Shepherd, 1997).

Students’ high levels of satisfaction with tourism studies in high schools in Israel, together with their attraction to the subject because it interests them and also offers professional certification, indicates a valuable and successful combination of theoretical tourism education studies and the professional-technological material of tourism related to training, as far as students in this track are concerned. In other words, it is possible to say that Israel’s high school tourism track curriculum reflects practical implementation of the researchers’ recommendations.

The findings about the attitudes of the students towards implementation of the educational aims in tourism studies as defined by the Ministry of Education are presented in Table 3. The students’ evaluation is highly positive in terms of attaining the aim of enhancing awareness of the importance of tourism. This aim is of central value for the students to clarify and internalise the importance of the industry. With these results, students will have greater motivation to learn the content matter of the subject and become familiar with its many aspects. One of the elements considered for inclusion in the core body of knowledge
for tourism is “the significance and impact of tourism” (Holloway, 1995; Airey & Johnson, 1999), thus reflecting the importance attributed to this subject as a basis for tourism education. The fact that the students evaluated implementation of this aim more positively than the other aims questioned (Table 3), indicates the effectiveness and relevance of the subject matter and the learning process to which the students are exposed. Nurturing awareness of the importance of the industry with all that this entails, is also part of the supreme national aims for the entire population - to encourage a positive attitude towards tourism and tourists (Knesset, Education and Culture Committee, 2000). This is especially important in a country like Israel that aspires to develop incoming tourism traffic in the coming years (Ministry of Tourism, 1994; 1995). It is possible to see the educational nucleus of the tourism industry in the school setting as an important foundation that should be expanded to the community and the public at large. Studies have shown a high correlation between local community attitudes and the development of a country's tourism (Gunn, 1988; Mansfeld, 1992; Chalker, 1994).

The students positively assess the professional computer programme skills instilled in tourism studies (Table 3). This aim is related to vocational training studies and in the contemporary work world, the tourism industry is conspicuously dependent on professional computer software. Learning to operate and utilise professional programs constitutes an integral part of professional training for the industry, and the fact that the students see this aim implemented more positively than other aims, indicates that the students feel that they are actually applying the learning material in practice. Pizam (1999) contends that the place of the computer in the tourism industry will continue to grow and will become dominant in the future. This prediction underlines the significance and importance of the students' positive attitudes towards this element of their studies.

The students perceive their tourism studies positively in terms of developing the ability to judge tourist phenomena and processes, and of exposing them to greater understanding of the subject of "leisure" and its importance today (Table 3). Positive attitudes towards implementation of these aims should indicate that tourism studies endow students not only with knowledge, skills and vocational training, but also with an understanding of value-related issues at the personal and social level. The social importance of leisure education in the world was defined by the World Leisure and Recreation Association (WLRA). It sees leisure as a "most valued component of community development and requires an awareness of its advantages and benefits. Leisure literacy should be a societal goal" (WLRA, 1999, p. 3). This approach is reflected in the policy of Israel's Ministry of Education: "To help individuals, families, the community and society to achieve quality of life and good health through the wise use of leisure time, by developing and nurturing values and physical, affective, cognitive and social aspects, individually and in combination, as part of the aims of education in Israel and the various cultural heritages in Israeli society" (Ministry of Education, Culture and Sport, 1994, p. 6).

The students express positive attitudes towards the contribution of tourism to greater understanding and tolerance for the feelings, traditions and life styles of other peoples and nations, and to learning what are considered desirable patterns of behaviour (Table 3). It should not come as a surprise that assessment of these aims is lower than for the other aims presented, since these aims are much more abstract and value-oriented in nature, making them less salient in the curriculum. Thus, the positive evaluation of their implementation should be received with satisfaction, especially in a country such as Israel which is a melting pot of a large conglomeration of ethnic groups, nations and religions. For this reason,
nurturing understanding and tolerance is to be applauded as being of value even beyond the
direct contribution to tourism (Gelbman, 2001).

In contrast, the students do not see tourism studies as enhancing their love for the State
of Israel (Table 3). This aim, one of the general aims of education in Israel, is expressive,
that is, it is a type of aim for which no results can be offered or defined in advance (Eisner,
1970). This stands in contrast to the conception that clearly indicates the students’ behav-
ior after having completed one type of activity or another. A curriculum in tourism studies
does not include specific content on love of country. In Israel, however, learning about
one’s country was connected with love of one’s country even before the State was estab-
lished. In the 1930s and 1940s, Zionist-pioneering education preached redeeming the land,
conquering the wasteland, developing waterworks, forestation and manual labour and
working the land. These concepts were reflected in school subjects such as Homeland (ci-
tizenship) and Geography (Bar-Gal, 1993, pp. 50-51). Considering how deeply ingrained
these values have been in Israeli education for decades, a programme that includes the
country’s history, geography, art, religion, culture and tourist sites (most of them beautiful
or having special interest, and seen first-hand in study tours) can be expected to result in a
greater love of country.

The fact that the students do not see tourism studies as heightening their love of Israel
may also be connected to significant changes in Israeli society in recent years. Society has
become more individualistic and less patriotic than in the first years of the State’s existence.
This is natural, and attributable in part to changes such as a continual rise in the standard of
life and lifestyle, greater aspirations for self-fulfilment and a concomitantly lower identifi-
today distance Israel’s educational ideals from those characteristic of the early years of
statehood, such as the aspiration to create an ideal “pioneer” image emphasising the values
of love of country and service to the general public. Instead of these ideals, the curricular
system has moved to the scientific-rational stage, which is operational, assessable, aca-
demically oriented and connected to the evaluation and measurement of individual
achievements according to the acquisition of skills and knowledge. It would appear that
implementation of a value-oriented and idealistic aim such as love of country seems too
esoteric and abstract for most students. Love of one’s country is a subjective feeling of
which students are not necessarily aware. Furthermore, it is especially hard to judge an
“improvement” in one’s love of country (which could have been very high or very low
before the learning process). Perhaps a longer-term perspective (such as a few years after
completing studies, and not during them) is necessary to provide a more complete answer to
this question (Gelbman, 2001).

**Conclusions and Implications**

In light of the students’ positive attitudes towards their studies in the tourism track (Ta-
ble 1), there may be a greater potential for developing tourism as a subject in more high
schools and expanding its presently limited circle of learners. In recent years Israeli high
schools have been engaged in growing competition to attract more and better students, and
the emphasis has shifted to marketing each school’s special programmes and quality (Dror
& Liberman, 1997). Tourism as a subject might be an attractive subject for schools to offer,
because of its uniqueness, its interdisciplinary nature (Jafari & Ritchie, 1981; Gunn, 1987,
1991; Tribe, 1997), and the fact that students see it as an interesting subject. It should also
be possible to plan a marketing strategy through which to publicise the subject’s advantages
as well as its economic, social and national importance. This marketing effort should be shared by the educational authorities (schools and the Ministry of Education) and the tourism industry (Ministry of Tourism, Association of Travel Agents, Israel Hotel Association). Together, they could formulate an action policy combining national aspirations for tourism (to promote and develop the branch) with the educational aspects of training personnel for employment in the industry. Thus, Koh (1994, p. 853) recommends that the primary purpose should be to develop curriculum with the industry rather than for the industry.

The findings of this study indicate that tourism studies in Israeli high schools interest the students, who like what they are learning. It is possible to assume that the multidisciplinary nature of the tourism field (Jafari & Ritchie, 1981; Gunn, 1987, 1991; Tribe, 1997; Airey & Johnson, 1999) affects a broad spectrum of subjects in the tourism curriculum in the school, thus contributing to students' interest in the subject, as can be seen in this study. Yet, relatively few schools offer a tourism track: only 42 of the 950 high schools in Israel, with a proportionately small number of students (about 420 register each year Israel) (Ministry of Education, Culture and Sport, 1999, p. 2). This is a very small scale when compared with the number of 16-18 year olds who register for tourism studies in the UK. In 1996 this number stood at 35,000 registrants for at least one unit of the General National Vocational Qualification (GNVQ) in Leisure and Tourism (now the Qualifications and Curriculum Authority) (Airey & Johnson, 1999, p. 229). In other countries, tourism studies for this age group are generally not developed or are in initial development stages. The gap between Israel and the UK can be attributed to the substantially greater scale of tourism in the UK as compared with Israel. Moreover, Israel's tourism industry suffers from periodic crises ignited by political and regional factors (Mansfeld, 1996). Nevertheless, Israel and other countries in which education and training for tourism for 15-18 year olds is still not developed, can learn from the tourism curriculum in England and try to realise the potential inherent in this subject. They can take note of the fact that tourism is suitable for both high school and college studies, as was found in this study. Students take an interest in and like the subject, it contributes to achieving educational aims in terms of knowledge, skills and values (Table 3), and it plays a role in implementing official policy in Israel and in other countries trying to encourage the development of tourism for economic and national ends. It would be difficult to deny that the relationship between tourism education and the tourism industry is complex and that an important distinction can and should be drawn between tourism education and tourism training. Such a distinction will influence the type and depth of the relationship that develops between industry and education (Cooper & Shepherd, 1997, pp. 34-35). Despite this complexity, this study reflects the students' belief that both the educational and vocational aims of the studies have been attained. In other words, it is possible to implement a combined, integrated curriculum to the students' satisfaction, despite the complexity involved. In light of the students' positive responses to the tourism training element in their studies, it would appear that they value implementation of the researchers' recommendation to combine tourism education and tourism training studies, despite the complexity this entails (Koh, 1994; Wells, 1996; Cooper & Shepher, 1997).

This combination and co-operation should be maintained between the education system, mainly the Ministry of Education, and the industry's training system, through agencies such as the Ministry of Tourism, the Ministry of Labour, the Travel Agents Association and the Hotel Association. It would also appear to be advisable, as noted above, to aspire to find ways to strengthen the ties between the agencies, and thus improve and ensure greater effectiveness in the education and tourism training systems.
An expression of national policy towards tourism education in Israel can be found in the decision of the Education and Culture Committee of the Knesset [Israeli Parliament] from 31.1.2000:

The Education and Culture Committee determines that since the State of Israel is also a tourism country, it is necessary for the Ministry of Education together with the Ministry of Tourism to allocate resources for and give higher priority to developing an interdisciplinary curriculum in tourism to be integrated in other subjects, at all educational levels and with an overall systemic approach, and to give preference to implementing the programme in 'tourism-intensive areas' (Knesset, Education and Culture Committee, 31.1.2000).

Tourism education is usually referred to in the context of meeting work needs in the industry and keeping up with changing needs resulting from changes in technological development, client habits and competition (Go, 1991). A number of studies conducted in diverse countries examined the attitudes of tourism students towards actually making their career in the tourism industry (Kusluvan & Kusluvan, 2000; Airey & Frontistas, 1997; Ross, 1997, 1994; Getz, 1994; Baron & Maxwell, 1993). The results of this study of tourism studies in high schools in Israel indicate that tourism education can contribute to achieving value-related objectives such as developing sensitivity towards tourists, and other nations, ethnic groups and traditions (Table 3). It appears that tourism education should be treated not only as vocational training for the industry but also as a means of nurturing and educating for values such as being friendly to tourists, encouraging individuals to be tourists, hosting tourists, meeting with foreigners-guests, becoming more open to the world in general, and opening the world to the country. Words in this spirit were sounded in the meeting of the Education and Culture Committee of the Israel Knesset [Parliament] (Knesset, 31.1.2000) where the policy of the State of Israel on this issue was stated.

It would therefore seem important to find the ways and means of bringing tourism education to all schools in Israel and in other countries, not only as part of vocational training or studies within the tourism track, but for all students in the schools. Tourism could be included in other related subjects in school such as geography, sociology and economics. This possibility is especially suitable to the multidisciplinary nature of tourism as a subject (Jafari & Ritchie, 1981; Gunn, 1987, 1991; Tribe, 1997). This option of multidisciplinary education for values can also be instituted earlier in education, such as in elementary schools. Further research could examine new options for introducing tourism studies as a multidisciplinary field related to other subjects, elementary and high school ages in countries in the world.

Bibliography

Abraham, O. (1975). The inner world of teachers. Tel Aviv: Teachers Union of Israel. (Hebrew)


Gelbman, A., (2001), The curriculum in tourism and its implementation in high schools in Israel as seen by teachers and students, Liverpool: A thesis submitted with the requirements of the University of Liverpool for the degree of Doctor in Philosophy.


Table 1: Students’ attitudes towards the importance of tourism as a subject (n=279)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Mean</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is important for me to learn tourism</td>
<td>1.92</td>
<td>0.73</td>
</tr>
<tr>
<td>I like learning tourism</td>
<td>1.90</td>
<td>0.74</td>
</tr>
<tr>
<td>Success in tourism is more important to me than success in other subjects</td>
<td>2.28</td>
<td>0.95</td>
</tr>
<tr>
<td>Tourism lessons interest me</td>
<td>1.89</td>
<td>0.77</td>
</tr>
<tr>
<td>I chose the tourism track because in addition to a matriculation certificate I will also receive a professional diploma</td>
<td>0.61</td>
<td>0.49</td>
</tr>
<tr>
<td>I am pleased that I chose to study in the tourism track</td>
<td>1.70</td>
<td>0.77</td>
</tr>
</tbody>
</table>

*The lower the mean, the more positive is the attitude about the importance of the subject. A mean greater than 2.5 indicates a negative attitude and a mean of 2.5 or lower indicates a positive attitude.

Table 2: Distribution of reasons for students choosing tourism by categories (N=224)

<table>
<thead>
<tr>
<th>Reasons for choosing the tourism track</th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The subject seems interesting.</td>
<td>42.0% (94)</td>
</tr>
<tr>
<td>2. The subject is more interesting than other subjects offered in school (or the other subjects are less interesting)</td>
<td>13.4% (30)</td>
</tr>
<tr>
<td>3. It was not my decision (parents, school…)</td>
<td>9.8% (22)</td>
</tr>
<tr>
<td>4. The desire to work in the profession or to continue studies in it in the future.</td>
<td>9.4% (21)</td>
</tr>
<tr>
<td>5. Receiving a professional diploma (+ matriculation)</td>
<td>6.7% (15)</td>
</tr>
<tr>
<td>6. Love of the subject</td>
<td>6.7% (15)</td>
</tr>
<tr>
<td>7. Recommendation of friends or family members</td>
<td>5.3% (12)</td>
</tr>
<tr>
<td>8. Love of travel/touring/nature</td>
<td>4.9% (11)</td>
</tr>
<tr>
<td>9. A desire to know the world</td>
<td>1.8% (4)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100% (224)</strong></td>
</tr>
</tbody>
</table>
### Table 3: Students’ attitudes about implementation of educational aims (n=279)

<table>
<thead>
<tr>
<th></th>
<th>Mean</th>
<th>Standard Deviation</th>
<th>P</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism studies increase students’ love for Israel</td>
<td>2.63</td>
<td>1.98</td>
<td>0.05</td>
</tr>
<tr>
<td>Tourism lessons teach students what desirable behaviours are</td>
<td>2.30</td>
<td>0.95</td>
<td>0.001</td>
</tr>
<tr>
<td>Tourism studies contribute to greater awareness of the importance of tourism and hotels</td>
<td>1.49</td>
<td>0.62</td>
<td>0.001</td>
</tr>
<tr>
<td>Tourism studies expose students to a greater understanding of concept “leisure” and its importance today</td>
<td>1.76</td>
<td>0.87</td>
<td>0.001</td>
</tr>
<tr>
<td>Tourism studies teach students the skills for using professional computer programmes</td>
<td>1.60</td>
<td>0.83</td>
<td>0.001</td>
</tr>
<tr>
<td>Tourism studies will enable students to fit into the tourism branch in Israel</td>
<td>2.00</td>
<td>1.82</td>
<td>0.001</td>
</tr>
<tr>
<td>Tourism studies contribute to nurturing understanding and tolerance for the feelings, traditions and life-styles of other peoples and nations</td>
<td>1.93</td>
<td>1.38</td>
<td>0.001</td>
</tr>
<tr>
<td>Tourism studies develop judgmental ability for tourist phenomena and processes</td>
<td>1.72</td>
<td>1.00</td>
<td>0.001</td>
</tr>
</tbody>
</table>

* The lower the mean, the more positive is the attitude about the importance of the subject. A mean greater than 2.5 indicates a negative attitude and a mean of 2.5 or lower indicates a positive attitude.

* p is the level of significance. The alpha level used to determine statistical significance is p<=0.05.
Internationalisation of a tourism education programme. A look at the Faculty of economics, University of Ljubljana, Slovenia

Prof. Tanja Mihalič

Abstract

Transitional countries in which economic, social and political transformations continue to accelerate at a rapid pace must adapt to the international and global dimension of tourism business. Clearly, education programmes cannot be left out of this process. There is a real need to make the tourism education programmes more comparable so as to promote exchange and compatibility within Europe and across the world. Transition countries, like Slovenia, and their institutions of education, have to catch up and become part of the European (international) tourism exchange education system in order to be able to support the competitiveness of the domestic tourism industry.

This paper describes the tourism studies currently available at the Faculty of Economics of the University of Ljubljana (FELU). It discusses the need for the FELU’s international recognition and concentrates on the tourism curriculum at the undergraduate and postgraduate levels. The paper addresses the constraints on the internationalisation of education programmes and degrees. First, the attractiveness of the education product depends on the attractiveness of the place, e.g. the city and country involved. Secondly, the quality of the education on offer is also an important part of the attractiveness of an education institution for foreign students, professors and researchers. Further, language barriers can reduce one’s desire to choose a certain destination for study or professional cooperation. Last, low compatibility of study programmes among partner institutions can prevent the recognition of subjects taken abroad and thus reduce the exchange flow. The author tries to define the tools that may help in efforts towards greater internationalisation. Among these certification schemes, EQUIS for the FELU and TEDQUAL for tourism education programmes are given special attention.

1 Prof. Tanja Mihalič, Faculty of Economics, University of Ljubljana, Kardeljeva pl. 17, 10000 Ljubljana, Slovenia, homepage: http://www.ef.uni-lj.si, phone: + 386 (1) 5892 571, 5892 400, fax: +386 (1) 5892 698, e-mail: tanja.mihalic@uni-lj.si, homepage: http://members.tripod.com/mihalic/tanjamihalic.html
INTRODUCTION

In principle, tourism education as well as training and research should pay due regard to the industry’s requirements, as well as its development and trends. On one hand, it has to be adapted to practical needs but, on other, the link between education and practice is dialectical. The mere adapting of education to the requirements of the tourism industry has no future (Tourism education and training, 1999:10). Education in tourism must also stay ahead of the industry and follow all new technologies, new innovations and new developments. These are rarely developed and implemented within the tourism industry without research and educational support. The tourism industry needs up-to-date, well-educated tourism professionals. In the era of the new economy, which is bringing about enormous changes to the tourism business and turning it into an electronic business, is truer than ever before. Transitional countries in which economic, social and political transformations continue to accelerate at an even faster pace must adapt to the international and global dimension of tourism business and clearly education programmes cannot be left out of this process. Quality curriculum development is especially dependent upon international relationships and mobility (Peršič, 2001: 71). There is a real need to make the tourism education programmes more comparable so as to promote exchange and compatibility within Europe and across the world. Transition countries, like Slovenia, and their institutions of education, like the Faculty of Economics of Ljubljana University (FELU), have to catch up and become part of the European (international) tourism exchange education system in order to be able to support the competitiveness of the domestic tourism industry.

This paper describes the tourism studies currently available at the Faculty of Economics of the University of Ljubljana. It discusses the need for the FELU’s international recognition and concentrates on the tourism curriculum at undergraduate and postgraduate levels. The paper addresses the constraints on the internationalisation and Europeanisation of education programmes and degrees. Finally, the tools that may help in efforts towards greater internationalisation are also presented, including the certification schemes, EQUIS for the FELU, and TEDQUAL for tourism education programmes.

THE FELU, SLOVENIA

Slovenia is a transition country established in 1991 by a proclamation of independence and separation from the socialist Yugoslavia. The development of the country’s tourism industry is seen as a serious economic development opportunity, as in many other transition countries. Slovenia already has a relatively developed tourism infrastructure. After a serious drop in tourism flows to Slovenia due to the proclamation of independence and the short war against the Yugoslav army in 1991, tourism in Slovenia is once again on an upward trend.

At present, Slovenia has two universities (Ljubljana and Maribor) and some other higher education institutions that are not organised as universities. With its 35,000 undergraduate and postgraduate students participating in more than 130 undergraduate and 110 postgraduate programmes, Ljubljana University ranks among the biggest universities on the world scale. A total of 20 faculties, 3 art academies and 3 university colleges employ approximately 1,700 full-time university teaching staff, assisted by nearly 600 technical and administrative staff.
The Faculty of Economics (FELU) is one of the University of Ljubljana’s 20 faculties. Of the 35,000 students attending the University, more than 25 percent study economics and business at the Faculty of Economics: 8,000 at the undergraduate and 1,000 at the postgraduate level. Among other programmes, the FELU offers education for professional and managerial functions in tourism. In Slovenia two other centres offer graduates some partly competitive tourism studies: the University of Maribor and Turistica in Portorož.

Tourism studies at the FELU celebrated their 40th anniversary in 2001. In the 2000/01 school year we had 500 students more or less involved in our tourism programmes (Figure 1).

**Tourism Curriculum at the FELU**

The FELU offers tourism programmes and subjects at undergraduate and postgraduate levels.

*Undergraduate studies*

At undergraduate level the Faculty has two main programmes (Figure A in the Appendix).

1. Business School Study Programme

As part of the Business School, the **undergraduate Tourism Education Programme (TEP)** offers general economic and business knowledge and ‘tourism classes’ such as: Management in Tourism, Tourism Economics, Tourism Marketing, Environmental Economics in Tourism, Sociology of Tourism and Tourism Law. In 2000/2001 the FELU had about 300 undergraduate tourism students (Figure 1).

Within the University Study Programme only one optional tourism subject is offered: *Tourism Economics*, which attracts about 120 fourth-year university students every year. It gives them general knowledge in tourism and the option of writing a tourism-related diploma thesis in business or economics.
### Participants in

<table>
<thead>
<tr>
<th>Number of students</th>
<th>Full-time study</th>
<th>Long-distance study</th>
<th>Part-time study</th>
<th>Foreign exchange programme</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td></td>
<td>5</td>
</tr>
</tbody>
</table>

#### 1. Undergraduate Tourism Programme

- **Business School Study Programme**
  - Year 2: 60
  - Year 3: 59
  - Year 4: 52

#### 2. Master of Science Degree Programme

- Year 2: 6

#### 3. Optional subjects

- Tourism Economics (University Study Programme in Economics and Business, year 4): 100
- Economics and Marketing in Tourism, (Master’s of Science Degree Programme, year 2): 40

#### 4. Thesis in tourism subjects

- Business School Degree: 20
- University Degree: 10
- Master of Science Degree: 8
- Ph.D. Degree: 3

**Total (1+2+3)**: 503

**Total number of tourism subjects: 13**

*Sources: FELU internal data for graduate studies, 2001; FELU internal data for graduate studies, 2001.*

---

**Graduate and Ph.D. studies**

At the postgraduate level, in general terms the Faculty of Economics offers:

- one-year Specialist Degree Programmes;
- two-year M.Sc. Degree Programmes; and
- Doctoral Studies (Figure B in the Appendix).

At present, there is no Specialist Degree Programme in Tourism. Since Tourism graduates from the Business School are only allowed to continue their study in one-year postgraduate programmes, there is strong demand from tourism business school students for such a study, and this will be offered in the near future.
A Postgraduate Tourism Programme is offered as a field of specialisation of a two-year Master of Science Degree Programme in Economics (Figure B in the Appendix). Besides general economic subjects, the following tourism specialisation subjects are offered: Tourism Economics, Economics for Tourism Enterprises, Management in Tourism, Sociology of Tourism, Tourism Policy.

At Master’s level we also offer an optional tourism subject Economics and Marketing in Tourism, which normally has about 40 students a year. Although a mixture of economics and marketing, it has been created in order to deliver an overview and introductory knowledge in tourism to those professionals who will not work in the hotel or travel industry, but in firms that also depend on tourism business, such as insurance, banks, airline companies or other transport firms, trade, etc., or in parts of the public administration involved in tourism development.

Figure 2: Staff and GUEST speakers lecturing IN tourism subjects AT undergraduate and postgraduate levels, 2000/01 school year

<table>
<thead>
<tr>
<th>Staff</th>
<th>FELU staff</th>
<th>Tourism staff*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>FELU professors</td>
<td>38</td>
<td>1</td>
</tr>
<tr>
<td>FELU assistant professors</td>
<td>15</td>
<td>1</td>
</tr>
<tr>
<td>FELU lecturers</td>
<td>20</td>
<td>0</td>
</tr>
<tr>
<td>FELU teaching and research assistants</td>
<td>67</td>
<td>1</td>
</tr>
<tr>
<td>Guest foreign professors**</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Guest speakers from tourism firms</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>9</td>
</tr>
</tbody>
</table>

* Only staff lecturing and doing research in the tourism area.

** Foreign professors from Sweden, Croatia and the United Kingdom lectured at graduate level.

Sources: FELU internal data for undergraduate studies, 2001; FELU internal data for graduate studies, 2001.

Research

The Faculty of Economics has its own Research Centre which conducts basic and applied research projects in the fields of economics, business and information sciences, advises enterprises, the government, helps promote young researchers from the Faculty of Economics, organises seminars, conferences and publishes research publications.

The research topics covered by the RC are very diverse. They include studies at firm level though to studies at international level. In recent years, the RC has also taken part in Phare-Ace and Copernicus research and consulting projects, emphasising the problems involved with the Slovenian economy’s integration into the European Union.
INTERNATIONALISATION OF THE FELU

Even though globalisation, in the form of rapid economic integration between countries, has accelerated the consolidation of hotels, air carriers, and global brands, and has expanded markets and the alliances of educational organisations, etc., it is not affecting all countries equally (Gee, 2000). In order to avoid the unevenness of these impacts in the field of tourism, education and human resource development, combined action to adapt the content and methodology of tourism education to the changing circumstances is vital (WTO, 2000). Transition countries need to develop their ability to innovate, develop and implement new technologies and improve product marketing more than ever. Since education and training have a strong relationship to the mentioned abilities (Gee, 2000:2), it is vital to develop quality education. The Faculty of Economics is already in the process of the international educational accreditation of economic schools EQUIP (European Quality Improvement Programme). In addition, the TEDQUAL certification process for tourism programmes started in October 2001.

Tradition and Experience

Although situated in a socialist country for several decades, the FELU maintained a relationship with many academic institutions in economic and business administration areas world-wide. The first institutional agreement, signed with Indiana University (USA), dates back to the 1960s. Mutually beneficial co-operation with this University has continued without interruption for over three decades. During the 1980s, the FELU signed bilateral agreements for academic co-operation with a further 13 foreign universities that promote researchers' and teachers' exchanges.

The take-off phase of internationalisation started after independence was attained in 1991, mostly through participation in various international programmes and projects designed for post-socialist economies by the European Union. Within the framework of EU-sponsored programmes such as TEMPUS, PHARE, CEEPUS and PRAGMA, the FELU intensified international (primarily European) co-operation in research, increased professor and student exchanges and enabled the transfer of new educational techniques and new curriculum development.

In early 1999, the Republic of Slovenia became eligible to participate in the SOCRA-TES/ERASMUS programme. This further intensified student and teacher exchanges and has become one of the most efficient options for increasing the attractiveness of study at the FELU and in Slovenia.

Attractiveness of the Place

Like a tourist product, an ‘education product’ is also connected to the place where the institution is located. The attractiveness of such education products thus depends on the attractiveness of the place, e.g. the city and country involved, and can be measured by the interest of foreign students/professors and/or institutions to enter into exchange programmes with a given university. Due to the much greater interest of our students in studying abroad than foreign students’ interest in coming to Ljubljana, the school faces the challenge of achieving a balance in student exchange programmes and, consequently, ensuring that exchange programmes will be continuous and that the exchange is a true partnership with the participating school. The FELU is trying to increase its attractiveness through various measures. Thus, it promotes the specific details of its geographical area, of its status as a transitional country and EU-candidate country experienced in doing business with other ex-socialist countries. In
addition, established international exchange programmes such as the already-mentioned SOCRATES/ERASMUS programme that also regulates funding for exchanges can increase the attractiveness of a specific place. In the increasingly competitive world, these international co-operation agreements are a convenient institutional mechanism enhancing the mobility of faculty members and students alike and opening the door to other forms of co-operation in terms of both education and research.

**Quality of education and EQUIS international certification**

The quality of the education on offer is an important part of the attractiveness of an education institution. One paradox here is that today educational quality is connected to the international dimension of the institution, yet the very establishment of quality international relations requires quality. The FELU follows two long-term objectives in its student/professor exchange programmes: first, to offer Slovenian participants the chance to ‘internationalise’ their education and increase the quality of teaching and, second, to make the Faculty attractive to visiting students and teachers by offering quality and country-specific study subjects.

In September 1999 the FELU decided to join the European accreditation programme for economic and business schools EQUIP (European Quality Improvement Programme) in order to re-engineer the processes at FELU in line with internationally recognised standards and to make the FELU eligible for European Quality Improvement System EQUIS accreditation. (For more, see EQUIS, 2001).

EQUIP has the following aims:

- to utilise the tools the EFMD (European Foundation for Management Development) has developed for self-assessment and quality improvement;
- to subject the processes at the FELU to independent professional review and get feedback from experts; and
- to benchmark the FELU against institutions that have already achieved excellence in teaching and research in related fields (The EQUIP Self-assessment Process at the FELU, 2001: 1).

Another important vision of the FELU regarding recognition of its quality is to become a member of international education networks and consortia. In its new curriculum development, the FELU follows the CEMS (Community of European Management Schools) master study model.

**Language**

Since language barriers can reduce desire to choose a certain destination for study or professional co-operation, there are several reasons for introducing study courses at university undergraduate level in English: the exchange of students and professors within the framework of the SOCRATES-ERASMUS programme, the exchange of students and professors for a period of one or two semesters with different schools, and the ability to enable students from other countries who speak different languages to pursue studies in Slovenia. While there is a strong debate about using English as a teaching language in Slovenia as it may be inappropriate for the FELU’s national role, internationalisation has already forced us to offer some subjects in the English language as part of the regular programme beginning in the 2001/2002 school year.

The situation at graduate level is quite different. Graduate students must be fluent in English. Although most lectures are in the Slovenian language, guest professors lecture in
English, while the majority of literature is also in English. The FELU also offers an English MBA programme to foreign students.

Compatibility

The compatibility of tourism programmes at the international level is an essential part of internationalisation that enables the free transfer of information, methodology as well as people: teachers, researchers and students. At present, the main problem involves the free movement of students between different schools and the recognition of subjects taken at the host institution by the home institution. This problem will be resolved upon the implementation of the European Transfer Credit System.

Another issue of compatibility is the relevance of the study programmes that we offer. Since the FELU has only one tourism class at the university level, this is insufficient to attract exchange programmes focused primarily on tourism with tourism-specialising universities. For the future we are developing new programmes offering more tourism subjects as school-specific subjects (like St. Gallen University or Vienna University within the CEMS).

We offer tourism studies at the Business School, but at the beginning only University-level subjects are being offered in the English language, which presents a great obstacle to visiting foreign tourism students. In the meantime, foreign students are forced to study tourism subjects individually, with the assistance of a professor, which does not facilitate the exchanging of ideas and thoughts among foreign and local tourism students and simultaneously produces much lower ‘international’ benefits for all parties.

THE INTERNATIONALISATION OF TOURISM STUDIES

While the ‘general internationalisation’ of the FELU benefits tourism students through their involvement in general economics and business classes, in the future the internationalisation of tourism programmes will have to be upgraded. Here, we see opportunities in exploring all possible tools (Mihalič, 2001).

TEDQUAL - a tool for internationalising tourism programmes

The general goals of tourism certification are similar to the general goals of EQUIS accreditation. The WTO’s THEMIS certification process can primarily be seen as a special-field international quality standard for FELU’s tourism programme. In general, the certification system evaluates six processes: the employers (society and industry), the students, the curricula (pedagogical system), the faculty, infrastructure and management (WTO, undated: 1). The FELU decided to apply for accreditation in order to gain the obvious benefits of an education certification process such as improvements in quality in the areas of management, curricula and responsiveness to student and industry needs. Focused on internationalisation, the benefits expected from the TEDQUAL certification process are as follows (TEDQUAL, 1999: 8):

- compatibility of information, methodology and the contents of tourism programmes on a world scale;
- greater visibility and prestige for the FELU and its tourism programmes;
- opportunities to promote and share tasks with other education institutions around the world; and
- collaboration with the WTO in the field of education and research through the WTO’s Network of Tourism Centres (NTC) (Ritchie, 2000: 2).
Figure 3: INTERNATIONALISATION OF THE FELU AND ITS TOURISM STUDIES THROUGH ACCREDITATION

Accreditation scheme/ tool

International alliances/ aims

EQUIS ... European Quality Improvement System
TEDQUAL ... Certification System for Education Programmes of Tourism
CEMS ... Community of European Management Schools
NTC ... Network of Tourism Centres


**Ways to internationalise tourism programmes**

The FELU needs to explore all possible ways of internationalisation. Although TED-QUAL is a tool for internationalising tourism programmes, because it is based on international standards it also requires a certain level of internationalisation. Thus, other tools supporting the internationalisation of tourism programmes at the FELU must be explored to the greatest extent possible. Two processes work in favour of this aim for the FELU. The first is the development of the new economy that enables low-cost electronic networking among tourism education and research institutions and individual researchers, teachers and students, as well as access to the tourism business all around the globe. The second is the creation of the European Union that supports unification and standardisation, free mobility and equal access for all members and associate members (Slovenia is an associate member, set to join the EU in about 2004) in the education field through many financial frameworks.

Possible ways of internationalisation include:

- exchanges of professors in tourism studies (as part of the regular postgraduate programme or as extra seminars, financed by the FELU from national and EU sources);
- exchanges of students in tourism studies, in the framework of EU exchange programmes, as part of other bilateral and multilateral agreements;
- international internships as part of the education programme;
- international summer schools, seminars, Ph.D. workshops and conferences;
- electronic tourism conferences;
- electronic tourism networks, such as TRINET;
- co-operation with international organisations (AIEST, WTO, THEMIS etc.); and
- the development of school-specific subjects in tourism (for example, Environmental Economics in Tourism).

**DISCUSSION/CONCLUSION**

The benefits and opportunities stemming from the internationalisation and globalisation of tourism education programmes are needed at the FELU. A more balanced discussion of global education issues should also take into account the importance of national tourism and education approaches in tourism education. Gee (2000: 6) argues that the ‘tourism industry by its very nature resists any homogenisation of experience’ and adds that ‘product differentiation is critical in our industry, and tourism is made up of a wide range of different experiences.’ Nevertheless, tourism education should increase the ability of different cultural milieux to create value-added tourism services culturally different yet similar with respect to the highest comparative standards of care, comfort, safety and hospitality (Gee, 2000: 7).

In the future, the FELU intends to boost its international profile. Internationalisation, as one of the dominant topics in the FELU’s stated mission, is to be realised in both teaching and research areas. In the teaching area, the FELU will maintain and further develop international co-operation via exchanges of faculty members and students. Efforts will also be made to support those pedagogical approaches that include co-operative projects, including the preparation of common curricula, with partner schools. It is further intended to start offering a selected number of courses in English. This project aims at encouraging interna-
tional students to spend one part of their studies at the FELU. As far as research is concerned, it is a firm objective of the FELU to strengthen this area of its internationalisation. By allocating special funds to academic departments and newly created research units, research work should aim to achieve and maintain high international quality standards.

Tourism studies as part of FELU studies are part of the FELU’s internationalisation process and must simultaneously develop its own tourism-specific instruments and connections. On one hand, TEDQUAL certification is one such instrument but, on the other, – by being based on international standards - it also requires a certain degree of internationalisation. Accordingly, intensified co-operation with quality tourism universities and research institutions, participation in international conferences, summer schools and workshops, membership in tourism electronic networks such as TRINET and electronic conferences and all forms of international co-operation in curriculum development (CEMS etc.) are available and are relatively easily accessed ways of internationalising the tourism programmes offered by the FELU. Most of these avenues have already been fully explored, and, in particular, exchanges of people in all fields – research, teaching and study – must be intensified in the near future. Through the FELU’s certification through EQUIP, the FELU has become aware of the constraints on internationalisation while the appropriate measures to speed up the process have already been taken, as mentioned above (involving attractiveness, language, quality etc.).

However, many of these developments are recent and the amount of work still to be carried out should not be underestimated. All aspects of the School will need to be further internationalised if the FELU it is to assume a significant position within the international community (EQUIP, 2001: 36). The improved quality performance of the FELU will increase the quality of its Tourism studies and vice versa: international tourism certification and recognition will benefit the international position of the institution as a whole.
APPENDIX

Figure A: UNDERGRADUATE TOURISM STUDIES AT THE FACULTY OF ECONOMICS, UNIVERSITY OF LJUBLJANA

Following graduation from high school

BUSINESS SCHOOL STUDY PROGRAMME

- COMMON PROGRAMME
  Year 1
  - 8 general subjects
  TOURISM STUDIES
    Years 2,3,4
    - 17 general subjects
  6 tourism specialisation subjects:
    - International trade
    - Introduction to tourism
    - Tourism management
    - Tourism marketing
    - Environmental Economics in Tourism (o)
    - Sociology of Tourism (o)
    - 1 semester internship in a tourism firm
    - 1 semester for writing a thesis

- Thesis in tourism
- Diploma in ECONOMICS

UNIVERSITY STUDY PROGRAMME IN ECONOMICS AND BUSINESS

- DIFFERENT PROGRAMMES IN BUSINESS AND ECONOMICS
  Years 1,2,3,4
  plus an additional year for writing a thesis
  Only one tourism subject is offered as an option: Tourism Economics in the 4th year of study

- Thesis in tourism
- University degree in ECONOMICS or University degree in BUSINESS ECONOMICS

Postgraduate specialisation programmes (1 year)

Postgraduate Master of Science Degree Programme (2 years) and Doctoral Study

Note:

Besides Tourism Studies, the Business School also offers Management, Entrepreneurship, International Business, Insurance, Banking, Accounting Studies etc.

Note:

- The Faculty of Economics offers three different Ph.D. degrees: Ph.Ds. in Economics, in Business Administration and in Information Management. It offers 5 different Master’s degrees: Master's in Economics, in International Economics, in Business Administration, Entrepreneurial Studies, Information Management, Actuarial Studies.
- The subject Economics and Marketing in Tourism is offered as an optional subject within the Business Administration Master of Science programme.
- It is not obligatory when completing a Master’s/doctoral programme in tourism to write a tourism-related thesis.

References


'FELU', (2001), University of Ljubljana, (Faculty of Economics, Ljubljana).

FELU internal data for graduate studies, (2001), (Dept. for Graduate Studies, Faculty of Economics, Ljubljana).

FELU internal data for undergraduate studies, (2001), (Dept. for Graduate Studies, Faculty of Economics, Ljubljana).


Peršić, M., (2001), 'Quality of University's Tourism Education', Tourism and Hospitality Management, 6(1/2): 73-84.


'Tourism education and training is one of the most important components in the quality and success of tourism products', (1999), Tedqual, 1(1): 10-13.
