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Ilídia C. G. Carvalho

Lisbon Lusitana University, ilidiacarvalho@gmail.com

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Travel Agencies and Tourist Guides Adapting to Crisis: The Portuguese Case

Ilídia C. G. Carvalho

Lisbon Lusitana University
ilidiacarvalho@gmail.com

Tourism is constantly changing and new paradigms arise. Most recently, travel agencies and tourist guides have been facing difficulties and have had to quickly adapt themselves to be able to keep a position in the tourism market. COVID-19 brought major changes to travel and experience in destinations and it certainly increased the use of technology, which has totally changed communication systems and relationships in tourism. For this paper, interviews with Portuguese travel agents and tourist guides were carried out and were later analysed allowing the author to gain insights into the current situation regarding these two stakeholders, which were previously considered to be essential for tourism, but today seem to be somehow dispensable. To be able to adapt to modern tourism they will have to develop effective ways of working and new cooperation strategies, some of which are discussed in this article.

Key Words: tourism, pandemic, new technologies, travel agencies, tourist guides, adaptation strategies, new paradigms of tourism

Introduction

Tourism is a very old activity and nowadays it is even considered to be indispensable for the general wellbeing of many people all over the world. There is a 'relationship between tourism, quality of life and well-being of those involved in the touristic experience' (Couto, 2012:6). This is an activity that much influences not only the life of those who practice tourism, but also the involved communities and of course the tourism professionals, such as travel agents and tourist guides¹, who will be the main scope of this paper.

In older times when people began to travel for diverse reasons, tourist guiding turned to be a profession, which developed various kinds of mediation skills. Those professionals were first meant to show the way and protect travellers from many dangers;

the cultural mediation mentioned by Feldman and Skinner (2018) or Rabotic (2010) was quickly introduced soon after and was developed quickly with the Grand Tour, when travelling for culture and pleasure was becoming essential for the education of the wealthy. This was the time when 'the role of the modern tour guide' (Cohen 1998:6) appeared. Using Cohen's nomenclature, guides went from the simple pathfinder function - of simply showing the way, to the elaborate mentor function - assuming a more complex set of knowledge to be transmitted about the place and people. Nowadays, a tourist guide is

[The] (p)erson who guides visitors in the language of their choice and interprets the cultural and natural heritage of an area, normally having for that an area-specific qualification usually issued and / or recognized by the appropriate authorities (FEG, 2020:np).

¹ In this article the term 'tourist guide' is mainly used, since this is the name given to the profession in British English. However some authors use the American English version - tour guide, which could be considered a better one, mainly because nowadays the guides are not only guiding tourists as they mainly did before, but rather visitors in general. Adapting to new kinds of tourism, this profession has been changing, and new concepts and definitions will also bring different names and terminology.

The Grand Tour was an enormous turning point in tourism and it already reflected the germs of modern tourism, since it completely changed the way travelling was conceived, creating the need for an organised and structured offer that appears

now through the actions of travel agencies.² These stakeholders, whose main purpose is to organise and sell package travels or facilitate the purchase of related travel services and provide pre and post-trip assistance to customers,³ have always been important tourism promoters and they have been able to create and develop many tourism destinations using creativity and innovation as their main tools.

Due to the increase of travelling activity stimulated by the Grand Tour and later by the constantly innovative transportation offer, which provided for the flourishing of mass tourism, travel agencies needed someone to guide their clients. Tourist guides were then hired by the agencies, either as employees or just as freelancers, but in either way a strong or what seemed to be an everlasting symbiosis was then created. These two fundamental stakeholders, whose main purpose is to facilitate tourism activity, have always been responding to the needs of travellers. They have been working together and they have shown themselves to always be adaptable towards new situations, having already been able to overcome many critical moments in the history of tourism. Our main question now is: How are they facing the current situation resulting from the digital age and the pandemic and which strategies will be developed to overcome the current crises?

Although the benefits of tourism cannot simply be reduced to economic impacts, as Couto (2012) also defends, it becomes evident that in many countries tourism generously contributes to Gross Domestic Product (GDP). When looking at the World Travel & Tourism Council (WTTC) statistics it is possible to see that the travel and tourism sector contributed 10.4% to global GDP in 2019. Many persons around the world completely depend on tourism to have good conditions of life for them and their families

2 The first travel agency was founded in 1758 in England under the name Cox & Kings. In 1841 Thomas Cook was a pioneer organising the first group excursions; this agency / tour operator went bankrupt in 2019. Thomas Cook is credited with bringing 'travel to the general public by introducing the tour package' (Morales, nd:12).

3 According to Turismo de Portugal. See: http://business.turismodeportugal.pt/pt/Planear_Iniciar/Como_comecar/Agencias_Viagem_Turismo/Paginas/default.aspx

and that happens in far off rural communities as well as in big metropolises. Tourism is everywhere and has considerably influenced the economy and lifestyle of millions of people in a direct or indirect way.

As Soforov (2018) comments, the countries which manage to understand that the growing volume and complexity of tourism services justifies this phenomenon to be treated as a distinct branch of the growing modern economy are those which have been developing the most. In many countries such as Portugal, tourism is an extremely important activity contributing for the development of the country. But, tourism is a dynamic activity and stakeholders have to be aware of new trends and have to consider new motivations, new needs and new ways of travelling presented by modern societies and at the same time offering them innovation and creativity. Tourism has then a dual role, since as Zuelow (2017) says, tourism developed as a product of modernisation, also plays an important role in shaping the experience of modernity. In fact nowadays, travelling is a symbol of modernity because 'tourism *itself* is modern' (Zuelow, 2017:np) always using *avant-garde* technologies and following the continuous change of mentalities; it even greatly contributes to modern society. Nowadays, people like to practice tourism and due to the constant development of means of transport this has become easier and more usual. Because of current social demands tourism has become fashionable and therefore people want to practice it. People also need to practice tourism because they know it will bring them several benefits, including cultural advancement, status and happiness.

According to the United Nations World Tourism Organization (UNWTO) there was 1.4 billion tourist arrivals in 2018, and people travelled around the world for many different reasons. Discussing the expansion of tourism, the UNWTO stated that 'this figure has even exceeded the ... [predicted] forecasts' (UNWTO, 2019:2). While the COVID-19 pandemic seriously damaged tourism, indications are that recovery is very strong in many locations and international experts are highly optimistic about

the rebounding of tourism (UNWTO, 2022). Some fantastic perspectives for the future development of this activity have been suggested by authors such as Sofronov (2018), who in his pre-pandemic paper⁴ wrote:

Travel and tourism industry yields significant economic and social benefits around the world, and possesses the power to change people's lives for the better by driving economic growth and development, reducing poverty through the provision of livelihoods, and fostering tolerance and peace through intercultural exchange and understanding (Sofronov, 2018:128).

Undoubtedly that 'there are several characteristics that make tourism an attractive economic development option' (UNWTO, 2021b:np) also supported by several strong social aspects. This is the reason why tourism has developed so much and is often seen as a good solution for a countries' economy because

tourism is strongly recognized as a valuable tool in alleviating poverty ... (and nowadays) ... it also contributes in a major way to the long-term sustainability and competitiveness of destinations (UNWTO, 2021b:np).

Tourism turned into a powerful organised industry all over the world, but things can change. This kind of organised tourism according to some authors, such as Buhalis (1998) or Diamandis (2018) is being threatened in different aspects and recently the stakeholders connected to this old model have been forced to adapt themselves to new working conditions (as evidenced during COVID-19 when many tourism businesses were forced to adapt / change / evolve in order to survive).

⁴ We have to consider that because of COVID-19 the year 2020 became a milestone for tourism. Until then, tourism was one of the most successful activities and all of a sudden everything collapsed. Changes at all levels were introduced in the way we live, communicate and travel. Nowadays, when referring to tourism activity we must refer to a pre-pandemic and a post-pandemic time, which is now being explored and evaluated.

Tourism can be very unstable, being much influenced by structural or cyclical factors, which present new challenges and ask for new solutions. Current times are proving this, because the activity is at the moment suffering both the consequences of digitalization and the pandemic, in such a way that some authors say 'the positive scenario envisioned up to February 2020 went down the drain' (Brito & Carvalho, 2021:1). Crises have appeared over the centuries, but never before have they had such deep, and wide impacts in such a quick time frame. At this precise moment tourism is changing so much that it could be considered as a revolution, perhaps similar to the Grand Tour in the past. Tourism services, namely the travel agencies and the tourist guides have now to adapt and collaborate to be able to survive.

Throughout this article we intend to present the impacts of COVID-19 and the influence of new technologies on the performance of Portuguese travel agencies. Also the impact of this pandemic and the consequences of digital transformations on the tourist guide profession, using Portuguese tourist guides as the example, will be discussed. The important changes introduced by the current situation in the relationship between these two traditional stakeholders will be considered in this work as well.

To be able to discuss these aspects and show the current situation, Portugal is used as a case study and several interviews were conducted with certified Portuguese tourist guides and traditional Portuguese travel agents, their statements being later analysed and the results compiled, allowing us to achieve an interesting level of knowledge about these important stakeholders.

Portugal is the case study chosen not only because the author, being herself a long experienced Portuguese tourist guide, has been able to personally witness all these changes, but also because this is a country with a long tradition in tourism, considered to be one of the most important tourism destinations in Europe, having received several awards in the last decades. Therefore, it may be considered as a good example for what has been happening in tourism.

COVID-19 and the Implementation of Digital Technologies in Tourism

It must be recognised that the situation which tourism is facing today is very rare, because it is not only a health crisis, it is a complete change in the way tourism is evolving and these changes are not confined to one geographic area, they are worldwide. The impacts are enormous, whether we consider either the short or the long term. Some authors when discussing COVID-19 in 2020 mentioned ‘... we didn’t yet have a notion of how long it would last and how serious it could be’ (Brito & Carvalho, 2021:1). Nowadays, even though we have more information, many of the consequences will not be noticed, but will certainly influence the development of tourism activity and the future of its stakeholders. One of our interviewees working in a travel agency said:

No one knows exactly when and how this crisis will disappear and no one knows how many of us will survive (TA2⁵).

Speaking about the impact of Covid, Brito & Carvalho, (2021:1) stated:

... (in 2020)... all of a sudden, the hospitality industry started to see their reservations cancelled and many tourism professionals went home to work online, if they were lucky enough, because many of their counterparts simply lost their jobs.

Many stayed at home just hoping for normality to return and be allowed to go back to their activities, but as Carvalho (2020) claimed, normality will never be the same again, because the impacts were just too profound. The WTTC and UNWTO statistics also show how deep tourism was impacted all over the world in 2020 because of COVID-19.

When comparing the figures from 2019 with those of 2020 and even with the first half of 2021 the results are shocking - in 2020 alone, ‘62 million jobs were lost (WTTC, 2021:np) out of 334 million existing in 2019. Due to the ongoing restrictions to mobility,

5 ‘TA2’ denotes ‘Travel Agent 2’ according to the schedule of interviews - as explained in the methodology section of this paper..

the tourism’s contribution to Global GDP in 2020 decreased to 5.5%. According to the UNWTO (2021a), January to May 2021 international tourist arrivals were still low, with a drop of 85% when comparing with the same period of 2019. This decline represents a drop of 460 Million of international arrivals.

After an estimated 64% plunge in international tourism receipts in 2020, destinations continued to report very weak revenues in the first five months of 2021 (UNWTO, 2021a:1).

This is in line with the abrupt drop of international passenger traffic, even though there was some recovery in travel by May 2021, namely because of domestic travel. According to the above-mentioned UNWTO report, in some destinations, such as China, the domestic market has been the solution. The author considers that in countries, such as Portugal, where the population is not very big or in countries where locals are financially not able to travel, domestic tourism is not enough. Also the tourism structure of those countries where inbound tourism is the main practice has to be adapted and that takes time. In many cases, tourism professionals, such as tourist guides, have not been used to working with locals and even when they try to adapt themselves, locals have not been used to hiring their services.

By the end of 2020

[The] proportion of closed destinations dropped to 18% by early November, as many countries changed their policy of full shutdowns to partial restrictions, such as compulsory quarantines or travel bans for certain markets (UNWTO, 2021a:7).

This UNWTO report also states that ‘starting in May, several European destinations relaxed their travel restrictions’. Contrary to all other worldwide regions and especially Asia and the Pacific where there was an increase of 65% of closed destinations, Europe was the only continent that showed a drop in closed destinations in that period. This was primarily due to policymakers’ actions which aimed to encourage travel during the summer months, trying to restart

tourism activity. One of the innovative strategies was to prepare all stakeholders along the tourist chain to deal with visitors in a safe manner. This involved providing information about safety and hygiene measures to restore visitors' confidence on their safety. Portugal was one of the first European countries to introduce a clean and safe seal (Figure 1) created by *Turismo de Portugal* as referred by Carvalho (2020) and many travel agencies and tourist guides in the country quickly obtained that seal.

At the beginning of 2021 the slight recovery that seemed to exist, or at least almost everyone wanted to believe it would come, suddenly vanished, because

global tourism suffered another setback ... as countries tightened travel restrictions in response to new virus strains and increased infections in different parts of the world (UNWTO, 2021a:7).

Several strategies were introduced to prepare countries to (re)start safely as soon as possible. While vaccination seemed to be working very well in some territories, a responsible approach for the restart of tourism was still required. The approach taken required

a coordinated response between countries regarding travel restrictions, harmonised safety protocols and an effective level of communication (UNWTO, 2021a).

Interestingly, on a positive note, the pandemic offered the opportunity for people to think about several problems related to tourism: the relationship between tourism and nature / environment, sustainability, authentic experience and even the way digital technologies (with all the new tools they provide) have been used in tourism. Academics began to think about the industry and how it could develop into the future (Korstanje, & George, 2022; Haywood, 2022 etc.).

Figure 1 – Portugal Clean and Safe Seal



Source: <https://portugalcleanandsafe.com/en>

The Rise of Technology

Since the end of last century digital technologies have been one of the main vectors of modernisation of the world and tourism has also been affected. For some time, authors such as Law, Leung and Wong (2004:102) have believed that because of digital technology, 'the changes at the intermediary role as distribution channel of the travel agencies could bring to a possible ultimate disintermediation' of stakeholders. Also Cheyne, Downes and Legg (2005) suggest

changes [in] communication technologies and the advent of the internet have the potential to allow travel suppliers and consumers to inter-act directly, thus threatening the existence of traditional travel agent (Cheyne et al., 2005:41).

This is in line with Diamandis (2018) who seems to consider travel agencies to be doomed.

Nowadays, due to new technologies the communication process is changing rapidly and the pandemic has even deepened this situation, because 'people [have] become dependent on the internet both on the personal level ... as well as on the professional level...' (Carvalho, 2021:49). This is why tourism professionals have to adapt themselves.

In fact it is now the situation that ‘digital-related jobs will be among the most sought-after profiles in the tourism sector’ (Jorge, 2021:np).⁶ The world has changed and tourism activity is changing too.

In the last few years new trends in tourism are already heavily influenced by digitally based technologies, but the pandemic has created a bigger and faster dependence on digitals. Digital and virtual technologies were, for a certain period of the pandemic, the only way for people to stay in contact. In fact they turned to be the most useful communication tools and even more importantly, people got used to them. Visitors will now better accept these new tools and will probably change the way they decide on their holidays, being able to check even more easily for information and being more open to new experiences related to technology.

Travel Agencies

The fundamental role of a travel agency can be broadly summarised as ‘information, distribution, reservation and services’ (Cheung & Lam, 2009:85).
Travel Agents

...are expected to know about and be able to advise travellers about their destinations, such as the weather conditions, local ordinances and customs, attractions and exhibitions... (Kutty & Joy, 2020:1230)

Nowadays they also need to give clients the most recent information about safety measures and the specific requisites in each country to be visited. The internet can help them to get all this information and that is why some authors argue that travel agencies

should not treat the Internet as a threat ... [and]... instead should take advantage of the Internet as a new opportunity for offering additional added-value services ... [making] a commitment to online marketing

⁶ According to Andreia Fernando, section manager at Hays Portugal (specialised enterprise for tourism related jobs) there is a new trend in tourism. Due to the pandemic, digital marketing proved to be essential, therefore, there is a shortage of people in CRM (customer relationship management). This is particularly the case in travel agencies and will be quite a challenge for the future.

and information distribution (Law et al., 2004:106).

Some interviewed CEOs demonstrate an appreciation and understanding about the importance of taking advantage of these new technologies when they stated that nowadays

We have a better informed client so we have to give them more detailed information and internet allows that ... it would be impossible to give all the necessary information if we didn't have google (TA1).

Nowadays, the health measures and the respective protocols taken by each country and mostly the uncertainty, mainly resulting from frequent changes, demands a professional level of skill by travel professionals. Agents need to prevent people from having bad experiences when arriving at a destinations, during their stay or even when leaving a destination, as happened at the beginning of the very first COVID-19 lockdown, as several interviewees noted. Safety and hygiene are extremely important aspects of travel, particularly at the present time, and travellers depend more than ever, on the expertise of travel agencies to advise them - this can be a positive benefit for these stakeholders. This was also the opinion of several of our interviewees who said

we always have to keep up with the latest information to be able to advise our clients ... (TA4).

the clients expect us to give them the best information and help them to change dates and conditions of travelling whenever necessary (TA5).

they trust us to help them to be able to travel safely and some don't risk to book online as before (TA3).

In general, the responsible entities tried to develop strategies to recover from the pandemic, and digital technologies are one of the ways proposed to achieve that. Supporting the importance attributed to digitals is the fact that the UNWTO formed a partnership

Table 1: Questions

Questions related to new technologies issues	Questions related to COVID-19 issues
How have you been adapting to new technologies?	How are you coping with the pandemic?
How have the employees been adapting? Did they have training?	Have you used more digital tools than usual to overcome the situation?
Has the client been changing? And is your relationship with the client changing much?	How is your relationship with other travel agencies and partners / suppliers?
Have you reached new markets? Have you created new products?	Have the responsible entities (government, APAVT and <i>Turismo de Portugal</i>) provided solutions to overcome the crisis?
Has the relationship with other partners/ suppliers been changing? Such as tourist guides	In your opinion which would be the best strategies to overcome the current situation?
In your opinion have these changes been positive or negative for traditional Travel Agencies?	Which are your perspectives on the future?

with Facebook, Carvão (2021, in Jorge, 2021:13)⁷ claims that ‘digital transformation and sustainability are the main pillars of tourism development’. This is true and impacts on the travel industry ‘not only in digitally advanced countries but also in developing countries’ (Sharma, Sharma & Chaudhary, 2020:8).

In Portugal, following global trends, a revolution in tourism is occurring. Supporting this, *Turismo de Portugal*⁸ created ‘Digital Upgrade’ courses, which started in 2020 and have been attended by many tourism professionals, including tourist guides and travel agencies employees. These courses focus mainly on themes such as digital marketing and sustainability, which seem to be two of the most important vectors for future tourism development.

Methodology

This work is initially based on relevant literature to offer the author guidance and perspectives in connection with the current crisis in tourism and to demonstrate the present state of understanding. However, this work also considers the professional

7 Sandra Carvão is the representative of Portugal at the WTO.

8 This is an official entity regulating all the matters to do with tourism in Portugal. This entity belongs to the Economy and Digital Transition Ministry and has won several prizes due to innovation and great commitment. In June 2020 it created the Clean & Safe certificate, which seems to be the world’s first step towards safe travel.

experience of the author, who has been working as a tourist guide for the last 34 years in Portugal. Nevertheless, since such a work must always be objective and neutral the results of online interviews undertaken between April and June 2020 with Portuguese certified⁹ tourist guides are also considered by the author. On average, these 12 interviews took 45 minutes each and the Zoom platform was used, since there were quarantine restrictions at the time. These interviews, which are referred to throughout this paper as TG1 ... TG12, allowed a better understanding of some problems of the profession and made it possible to substantiate the author’s knowledge about the situation faced by these professionals due both to digital technologies and the pandemic.

In March/April 2021 the author used the new technologies (Zoom platform) to undertake several interviews with the CEO or relevant employees (designated by the CEO) of several representative travel agencies. In total, 6 interviews were undertaken, which are referred to throughout this paper as TA1 ... TA6, which allowed the author to more deeply understand what is really happening with traditional travel agencies in Portugal. Each

9 All participants were certified tourist guides recognised either by the AGIC (Association of Tourist Guides and Tour Managers) or SNATTI (the National Union of Tourist Guides) or even both, depending how long they have been working.

interview took about an hour and the choice of agencies was not completely random, since the author wanted to cover different fields in which the travel agencies work, such as cultural and religious tourism, nautical tourism, business and regular tours.

Content Analysis is

a set of techniques for analysing communications aiming to obtain by systematic and objective procedures of description of the content of messages indicators (quantitative or not) that allow the inference of knowledge relative to the conditions of production / reception (inferred variables) of these messages (Bardin, 2009:44),

Taking this into account, the work of transcription of the text was followed by the categorising of the questions / issues, which allowed the author to properly analyse the answers given to the questions in Table 1.

The travel agency interviewees were also asked to tell about the foundation of the agency (to have an idea on how long they have been in the market), number of employees (to be aware of their scale), which markets they mainly work with and what kind of client they have (to be able to understand the type of agency they are and which particular field they work with) and also their mission and vision, as well as their thoughts about authenticity and their sustainability concerns.

The qualitative data obtained through these semi-structured interviews proved to be extremely rich. The results were later used to produce a more accurate understanding of the current situation of tourist guides and traditional travel agencies in Portugal. Considerable effort was made on the author's side to remain neutral when collecting the data and later during the analysis of the results in order to guarantee their veracity and to provide a reliable study.

To further support the research, official statements and interviews given by official entities like *Turismo de Portugal*, the Association of Tourist Guides and

Tour Managers (AGIC) or even the Association of Portuguese Travel Agencies (APAVT) were taken into consideration during the analysis of the research findings of this work, which intends to offer an in-depth and exploratory study.

Portuguese Case Study

The impacts of COVID-19 in Portugal were extremely big. Portugal is a country much dependent on tourism, having received in the last decade in average more than 20 Million people per year (twice than the national population). Not having any visitors, as it happened last year, was considered as a terrible disaster. Even though the Portuguese Government was able to define from the beginning a certain strategy intended to help this economic sector, the truth is that the dependency on tourism was too big and ironically it was mainly because of COVID- 19 that people became most aware of it.

As stated above it is not only the pandemic that must be taken into consideration. The introduction of digital technologies and all the possibilities they bring into the tourism activity and the constant and rapid growth in the use of these modern technological tools, has also been influencing the way the tourism stakeholders nowadays work. Portuguese traditional travel agencies and Portuguese tourist guides are no exceptions and will be examined in these findings.

Impacts on Travel Agency

In March 2020 suddenly everything stopped. No one believed that it could happen and Portuguese travel agencies had to deal with the problem of the repatriation of many clients that were abroad and shortly they also had to decide what to do about future travel programmes. They paused their activities through 'lay-off' and waited, expecting the responsible entities to decide what to do. APAVT entered as soon as possible in negotiations with the Secretary of State for Tourism and they managed to find some strategies, such as 'vouchers', allowing travel agencies not to enter into bankruptcy. The creation of the 'voucher strategy' was extremely important, because those clients that had already booked with travel agencies could then postpone

the voyage, or in some cases, get a refund later. The majority (5 out of 6) of the travel agents in this study agreed with this measure and as one of the interviewees even mentioned:

it was the main measure that made it possible for agencies to hold on until now (TA6).

Another difficulty for the Agencies was the digital transition with all of its inherent consequences. Already in the last decade travel agencies had been more or less adapting to digital technology. Of course, several online agencies appeared on the market and traditional ones had to follow this trend to be able to keep their position and to be able to reach another kind of client, younger and more independent. Many Portuguese travel agencies had already developed departments to take care of online bookings. One interviewed CEO stated that even if it is not possible to make an online booking

the clients could take a look at the products and do simulations (TA2).

Clients have developed different needs and travel agencies have always tried to follow the new trends. One of the interviewees stated that there have been huge changes in client behaviour in recent decades:

At the beginning, when I started working, in the 80s, the clients came into the agency and would ask the professionals which would be the best travel for a certain price and time and they trusted the information given. Clients also tended to return if they were pleased with our services. Later they started to compare prices between agencies with similar programs and when they came again, they usually already knew where they would like to go. For those clients prices were not the decisive factor to choose one or another agency, but quality of services still was. Today the client is able to come into the agency already asking for a certain product and he already knows the price, therefore we are there rather to advise them, whenever choosing between one or another hotel depends on the client's characteristics. The professional also needs to have much more knowledge, and digitals are a necessity (TA1).

As far as digitals are concerned, we can say that for travel agencies there has been a digital revolution and websites have become more and more important. 'Website and e-mail are essential tools for digital marketing' (Sharma *et al.*, 2020:8). The early situation of traditional travel agencies which appeared 'to be losing the battle against their online counterparts and the airlines' (Cheung & Lam, 2009:86) is already changing and travel agencies have been trying to adapt themselves for some time, being now determined to recover their losses. Sharma *et al.* (2020) note that a website is a tool intended not only for information dissemination, but it also helps to build trust (when properly used by travel agencies) and can be used either by big travel agencies or by the smallest ones, which have now more chances to reach a larger share of the market, with effective results and lower expenses. The interviewees consider digital technologies as the best way to promote their work, allowing them to reach other markets

nowadays we are able to promote ourselves all over the world and we have clients from distant countries that we never thought about (TA5).

This statement reveals a generally positive feeling towards digital technologies.

Almost all of the Portuguese travel agencies in this study already had websites made by specialised enterprises in Digital Marketing, which is one of the possible ways for them to follow the trend (Cheung & Lam, 2009). Only one of the interviewees (TA5) said that the website of this small dimension travel agency had been made by those working there, but they also stated that now they need to do more investment in that field, because in the future these new technologies will be even more important than before. Others said:

we need to follow the general trend for digitals (TA3).

digitals allow us to give more and better information to the client (TA1).

if we want to assert in the market, we have to develop more digital skills (TA6).

The participants are well aware of the situation and are preparing for the future. They do not look at digitals as a threat, because they believe that the human relationship could never be replaced, being an intrinsic part of tourism. In the future, will this really be the truth?

Some authors consider that

travel agencies need to re-evaluate their existing activities and stop being just product providers but start concentrating on providing added value to the costumers (Kutty & Joy, 2020:1219).

This is in line with the interviewees, who said that

only the selling of 'packages'¹⁰ could face the strong competition felt - allowing the agencies to survive (TA2).

The role of travel agencies in promoting tourism must change, mostly because of new technologies. Travel agencies should focus on identifying the various factors which can influence their efficiency, and since they have a very wide scope it is also 'essential that their working should be taken into consideration for effective promotion of tourism' (Kutty & Joy, 2020:1230). As elicited from the interviewees, travel agents in general consider themselves to be:

[a] more reliable information source [and] trustful stakeholders.

All the interviewees stated that new technologies had been a way to keep in contact with the client during the pandemic. In some situations, when dealing with B2C¹¹ cases new technologies were used, either to help clients to rearrange travel dates or to keep them informed on the changes about the travel health measures. In the B2B cases, travel agencies tried also to inform about the current situation in Portugal or abroad, depending on if they were dealing with inbound or outbound tourism. Because of the constant changes in the pandemic figures, they had to rearrange new travel dates and to change the respective reservations with different stakeholders

¹⁰ Packages combine several services such as transfer, hotel, tours, etc.

¹¹ 'B2C' refers to the Business to Consumer model as opposed to 'B2B' which refers to Business to Business interactions.

involved, such as: hotels, restaurants, transportation companies and tourist guides. Interestingly, during this crisis, the internet, that seemed to be an obstacle to human relationships mostly supported communication and interaction; as an interviewee stated

I haven't ever been talking so much to my partners and clients as I have been able to do now. It has brought us closer (TA4).

Nevertheless, during this time period, many older employees decided to retire for different reasons, such as health, family and even new digital trends, as they are aware of the future demand for digital skills and they don't feel very comfortable. One of the interviewees said:

I have been learning and adapting myself but I understand that digitals will dominate this business and I do not want to be always asking my younger colleagues how to do it (TA4).

Tourism human resources must also evolve and the younger staff seem to be more digital-friendly, the question is how much will these employees need to develop other skills also very important for tourism - skills which are more natural in the older generation of travel agency employees, such as: personal and professional experience, human relationship experience, professional and psychological skills to be able to recognize the type of client they are dealing with, and so to be able to meet their needs. This may be a problem in the future because as one CEO (TA1) referred

clients are more demanding, always looking for different programs, new destinations and new experiences and only skilled professionals will be able to offer the right products ...

Another respondent (TA3) suggested

for sure the future will bring to staff more work and more responsibility especially when the activity will restart... [this is when] good professionals will be needed.

One of the main impacts of COVID-19 was unemployment among tourism stakeholders, because many of them (hotels, restaurants, bus companies and others such as travel agencies) had to close their doors or at least to reduce their employees - even though lay-off was established in Portugal as soon as possible. As far as the Portuguese travel agencies are concerned, all the interviewees said that at the beginning they tried as much as possible to keep their employees. They were first sent home in lay-off, from where many of them were also working whenever needed, mostly to support the clients (helping them to get back home or to change dates when waiting for the pandemic to be controlled). Nevertheless, when contracts finished many were not renewed and other employees retired. This will have consequences because as tourism recovers, these professionals, who already had training will probably be needed and then not all will be available. This is a serious loss in skilled professionals and this is why one of the interviewed CEO said

professionals are now different. Younger people think in a different way and they can be good on computers but the knowledge the older ones had developed through decades about dealing with clients, will be lost (TA3).

One of the biggest Portuguese travel agencies who deals with regular tours had to reduce their workforce and it was reported that while they had 120 members of staff at the end of 2019, they had just 83 persons working when the COVID restrictions were lifted. This travel (TA6) agency made a commitment to staff that were let go:

to call them first when more people will be needed again.

Another interviewee representing a travel agency mostly working with business tourism (TA5) also stated that

there was a need to reduce staff.

Another agency connected to cruise ships (TA2) had to change for

a smaller and less expensive office.

At the time of the research, Portuguese agencies that only worked with inbound tourism were hoping that infection figures would reduce due to vaccination all over the world and they were completely depending on the re-establishment of flight connections with the countries they mostly work with, namely several traditional clients from England, Germany, France, Brazil and Spain (even though the latter are traditional visitors that can also come by car and coach). The travel agencies working with the outbound tourism were mostly depending on the health travel conditions adopted by the different countries and they had already started working with Italy, Egypt, Baltic Countries and even Romania. Their choices depended on the infection figures and the inherent restrictions that changed every day.

Many agencies tried to reach the domestic market and one of the most successful programs then appearing was the 'Estrada Nacional n.2' (National Road n. 2) that goes across the country visiting the interior and less populated regions, and this will probably be a new trend in the future programming of tours. Never before did these professionals need to be so flexible, to continuously adapt their services. Despite this, some of them will not be able to survive the pandemic crises. Maybe it is still too early to know exactly how many travel agencies will discontinue their activities due to COVID-19, but according to Neto (2021:22) a prediction of about 3% was anticipated. The reported closure of offices by several travel agencies is in line with information given by some of the interviewees, who stated that they had to reduced staff. One respondent said

we had to organize business in a different way, having closed 2 offices, as to reduce costs (TA1).

Impacts on Tourist Guides

In the same way that Travel Agencies were impacted, tourist guides also suddenly suffered the consequences of the pandemic and found themselves with no work. As freelancers, Portuguese tourist guides had to rely mainly on their own financial savings and some also received support from the

State through the *Segurança Social*¹². Many of these professionals had then to look for other incomes, and they were surprised at their capability to embrace other jobs successfully, because as many of the interviewees said:

Tourist guiding is our passion and mission.

We like what we do and we understand how important we can be for the image of a tourism destination.

But a few stated:

I never thought I would be able to do anything else and even enjoy it.

I'm surprised with some of these new professional experiences.

In a recent survey made by AGIC in August 2021 there was a certain number of professionals (53 out of 180 respondents - 29%) who were temporarily working in some other activity (call centres, real estate and teaching). Out of that number, just over half intend to work as a tourist guide again, 40% are thinking of combining tourist guiding with this other profession and the remaining guides are still deciding. This may bring major negative consequences for the profession.

In Portugal tourist guiding has mostly been a full-time profession¹³ and not a part-time job. Until 2011¹⁴ in Portugal, to become a tourist guide it was mandatory to have specific education and certification, which means that they were always skilled professionals. The fact they may later consider to totally or even partially abandon the profession, can have serious consequences. This will be particularly serious when it is professionals who work with less common languages, such as Dutch, or even those who work

with DMCs¹⁵ or business tourism¹⁶. If these certified tourist guides disappear from the market it can be very damaging for the quality of services, because as one interviewed tourist guide and former president of AGIC, warns:

there may not be enough certified professionals to cover the future demand ... [and]... then may be an easier acceptance for uncertified professionals will take place.

This seems to be a possibility. Another of the interviewed professionals noted that some travel agencies

already accept to work with uncertified professionals for lower prices ... [and] ... of course the quality of tourist guiding will suffer and it is an unfair situation, because we studied and prepared ourselves the best we could (TG11).

During the lockdowns, tourist guides tried to use their free time in a positive way and the study made by Carvalho (2020) has shown that these professionals were able to really usefully occupy their free time. They stayed with their families,¹⁷ studying, doing things they never used to have time for, such as organising their library and some interviewees stated that:

if it wasn't the financial aspect I would be completely happy with this extra free time I had for me and my family during the lockdown (TG5).

12 Portuguese Social Welfare

13 This is in line with the results of a survey made by FEG (2020) where 87% of the respondents (out of a population of 2138 persons) were free-lancers who only worked as a tourist guide.

14 In this year the profession was deregulated.

15 DMC - Destination Marketing Companies - These agencies work with specific groups and programs with special thematic needs for which skilled professionals are needed.

16 Business Tourism includes MICE (Meetings, Incentive, Conference and Exhibit) Tourism. This has always been very demanding sector and needs skilled professionals. There is a mix of specific knowledge that the professionals must have to be able to successfully guide these groups. This is why agencies tend to rely on the same professionals, who they trust and who already know the 'philosophy' of the agency.

17 Tourist guiding is a very demanding profession for the relatives, because these professionals are often away for some time and at certain times of the year they have an extremely strong rhythm in their work not having much free time for the family.

Since they seem to be eternal students, always trying to improve their knowledge, they were able to attend some courses held through digital platforms and that has also changed the way these professionals have been dealing with digital technologies.

In the above mentioned study many of these professionals stated that their attitude towards digitals had changed after the first lockdown. Many professionals felt they were having a deep dive into technology, because they were obliged to learn how to work with new platforms such as Teams and Zoom to get into touch with relatives, friends, agencies, colleagues and even clients. Before the pandemic these professionals often used new technologies just to 'google' some information or to get contact addresses of services suppliers or even to contact agencies and receive the documentation needed to start the groups '... instead of losing time going there personally ...', as one of these professionals stated. In a study by Chambel (2021) there was a correlation between the age of professionals and the way that digital tools were used for the profession, the younger professionals being more inclined to use digitals.

The introduction of digital technologies and their new communication tools will continue to influence these professionals, because 'these technological changes and developments have implications for guided tours and tourist guides' communication' (Weiler & Black, 2015a:376). They will have to create new products which are more innovative and interactive. That can only be achieved by properly using these new technologies for their profession. They need training and the education of these professionals will have to take this into consideration. Some authors defend that the 'educational framework ensures high standards of guiding service' (Brito & Farrugia, 2020:8) but education must also adapt to these new challenges as referred by Morales, Guerra & Serantes (2009) Therefore, education must be less traditional as claimed by Santos Veloso & dos Santos Queirós (2019). Nowadays, as Brito & Farrugia (2020) state, education is changing and also adapting being fundamental to tourist guides that 'already during their education (they) are

trained to properly use new technologies for their future tourism profession' (Carvalho, 2021:58).

This is in line with the opinion of those professionals interviewed by Carvalho (2021), who considered the possibility to undertake courses in order to improve their digital skills. This author also stated that tourist guides

have managed to adapt to new motivations and different needs and even different cultural levels of visitors in the past decades (Carvalho, 2021:47)

and now they will also have to adapt themselves, because

the capacity of guides to acquire and adapt their communication approach and skills in response to these [new] trends is central to their future and that of the guided tour itself (Weiler & Black, 2015a:368).

At the moment, Portuguese tourist guides are preparing themselves for new itineraries. Some of them turned to the internal market and programs in nature, which seem to be the trend for the near future. They have also created professional sites and they are now advertising their services via social media (Facebook, Instagram and LinkedIn). Some have even created online tours trying to overcome the negative consequences of the pandemic. It seems that '... these sudden alternatives have become the positive side of the (pandemic) crisis' (Brito & Carvalho, 2021:2).

Some professionals also felt the need to join the Association of Tourist Guides and Tour Managers to participate in the cultural activities of the association. According to one interviewee it is important

... to give it also more power of negotiation, because we are only a few and we need to remain together (TG2).

Other tourist guides have created a group named *Escolhe Bem Quem Te Guia* (EBQTG)¹⁸ to unite these professionals, calling the attention to several problems of the profession during the current crises, namely the competition of uncertified professionals, and the need to diversify skill sets and methods. As some interviewed tourist guides stated: ‘the profession has to evolve’. They are fully aware that there are different ways of working and one of them even confessed

I am concerned about how rapidly we have to adapt ourselves to changes in the profession and our relationship with other tourism stakeholders (TG3).

Impacts on the Relationship Between Travel Agencies & Tourist Guides

Professional Guides

According to FEG - the European Federation of Tourist Guide Associations, the tourist guide profession has

historically developed for decades as a distinct profession within the tourism industry alongside other complementary professions that also contribute to the visitors’ overall experience (FEG, 2020, np).

This same institution also states that these professionals ‘are committed to quality and standards and add value to the visitor experience’ (FEG, 2020, np). Their contribution to the recovery of tourism can also be important because their ‘performance ... can make the difference in transmitting confidence and safety’ (Carvalho, 2020:220). This should also be recognised by other stakeholders, including the travel agencies, which have always been their preferential partners.

On the one hand travel agencies have been using tourist guides to accompany their clients, being depending on their performances and on their feedback to be able to introduce new and better programs. On the other hand, tourist guides have needed travel agencies to give them work, since travel agents usually had the first direct contact with the client, consisting of the purchase moment and being then responsible for the whole trip. In the traditional system travel agencies ‘managed the distribution of services and functioned as a guarantee of quality’ (Carvalho, 2021:50). Travel agencies mostly use certified guides and they can evaluate their performance through the clients’ feedback. As stated by Santos Veloso and dos Santos Queirós (2019) this evaluation can only be done by relying on the public appreciation. In this model, the tendency is to firstly hire the best guides who can be trusted on. It is a kind of partnership situation where a certain symbiosis is achieved, but there will always be critical issues, because nothing is perfect in such a compromise. As already stated by one of the tourist guides (TG11), one of the causes of tension is when uncertified professionals are hired by some travel agencies.

Because tourist guides are freelancers, when working for an agency they have to follow predefined itineraries and should not make any decisions connected to financial aspects of the tour.¹⁹ However, they still make many decisions and deal with issues and problems constantly. Historically, tourist guides or tour escorts whenever they were working abroad, were often on their own when travelling with a group, because there were no mobile phones and they were as they usually say: ‘working without a net’ (in both senses – no support and no technology). New technologies have changed the way they work and it has reduced certain responsibilities. Now they can easily reach the travel agents and as an interviewed CEO complained

tourist guides somehow have lost the skill to make decisions on their own as before (TA1).

¹⁸ EBQTG is a group of tourist guides who have started a movement which involves being physically present in the city centres and at tourism events as well as online to call attention in general to the importance of the quality of professionals accompanying tourists. The translation would be ‘Choose well who is guiding you’.

¹⁹ It is also important to follow the exact itinerary otherwise in case of an accident, the insurance company may not cover it.

If a simple mobile phone can change the balance between these two stakeholders, we just have to consider the consequences of all the other technologies which are now at their disposal.

Nowadays tourist guides are expected to be proactive. As some interviewees stated:

we can advertise our tours in the social media (TG1).

we must offer new experiences and create new tours to be able to reach more clients (TG6).

We have to modernise our profession (TG3).

we need to change the way we work and we should use all the tools that we have, as other people who aren't certified professionals easily do and they seem to be successful (TG12).

These professionals now accept as something normal that they need to reach directly to their clients. This seems to be better achieved by the younger generations and less by others who were not trained to do so and probably are less digitally skilled, (as noted in Chambel's (2021) study).

Tourist guides were more dependent on travel agencies in the past than today, mainly because they didn't have all the modern communication means and skills and there was even a time when 'they were not quite allowed to reach directly the client' (Carvalho, 2021:51). This liberalisation of the profession can cause some misunderstandings with travel agencies. Tourist guides, as stated by the former President of AGIC:

must be very careful not to make unfair competition, not giving lowest prices to the clients when reaching them directly.

These professionals always had a different tariff for national and for foreign agencies / clients and in the opinion of this interviewee it should be kept. This is a question of ethics that is evident for the professionals already for a long time in the market and they try now to transmit it to the new generations avoiding unfair situations and keeping a good relationship

with the national travel agencies.

Authenticity

Another issue that has to do with the relationship between tourist guides and travel agencies is the growing search for authenticity which tends to present new types of tourism. New visitors are looking for less intermediation and less organised tours, which both of these stakeholders heavily depend on. Nowadays, travel agencies are supposed to offer 'real experiences' in their programs,²⁰ so they can attract / keep their clients and this must be reflected in the tourist guides performance as well. As some authors comment, tourist guides 'play an important role in staging the experience' (Weiler & Black, 2015b:35). Even though the discussion about authenticity and real experiences is not a main focus of this paper it is quite interesting and it is influencing the performance and cooperation of both travel agencies and tourist guides, therefore it is important to point out some comments that were offered by the interviewed professionals.

This issue must be faced together by travel agents and tourist guides, since it mostly influences the visitor's performance. The question is always this: can organised tourism offer authenticity and real experiences? Yes and No will probably be the right answer. There are many aspects to be considered, but our interviewees both tourist guides and travel agents consider it possible to offer a reasonably authentic experience when proposing the best itineraries for people to learn about the places they are visiting - offering more free time, allowing a stronger relationship between visitor and community. Also the performance of the tourist guide (being himself or herself a local) is important. They should properly understand the power of modern storytelling as this is essential for the success of such a visit. As one interviewed travel agent said

The guide performance is fundamental for the experience that the visitor will have ...

²⁰ There are travel agencies arranging meetings between travel groups and residents which completely questions the essence of the 'real' or 'authentic'. These can only be considered as staged experiences because they are real but they should not be considered as authentic.

Table 2: Summary of Main Findings

Travel Agencies	Impact of Technology on Travel Agencies	<p>Portuguese traditional travel agents are aware of the importance of new technologies and have been adapting to new technologies. All interviewed agencies have websites mainly created by specialised enterprises. Some of them (the 2 bigger ones studied) have their own online booking departments.</p> <p>Only one agency has given employees proper training in digital skills, therefore the employees generally seem to depend mostly on the younger colleagues to learn.</p> <p>Due to the pressures of learning about technology, some older employees are retiring earlier. They will be missed because of the vast knowledge they acquired through the years - this will now be lost.</p>
	New Clients / New Products	<p>Clients are changing – becoming more independent, better informed and able to compare services, because ‘when they come to agencies they already know what they want’.</p> <p>This creates a new relationship between clients and travel agents.</p> <p>Agencies need to change the way they work and the products they sell: they create ‘packages’, which is their way of adding value. Products are now more elaborate, more complex this is much more demanding for the staff.</p>
	Importance of Technology	<p>Through new technologies agencies are able to reach new and distant markets. New technologies were used to keep in contact with clients during the pandemic. New technologies are proving to be positive but most agencies believe that human relationship will never be replaced. Relationship building and quality, are the main strengths of travel agencies.</p>
	Pandemic and Travel Agencies	<p>The pandemic has brought unemployment and bigger challenges for the Portuguese travel agencies. Nevertheless, they believe that the current hygienic measures and more demanding travelling conditions will in the short term be positive for them, since travelling has become more complicated and people probably will tend to book their voyages in a travel agency.</p>
	Coping with COVID	<p>Some solutions were found by the authorities in Portugal and ‘vouchers’ were a good measure. All respondents are expecting that vaccination will allow people to travel more and they all agree that it is the better strategy for the moment.</p>
Tourist Guides	Tourist Guides and the Pandemic	<p>Financially Portuguese certified tourist guides were deeply affected by the pandemic. Many had no work and had to look for other jobs (real estate, call centres or teaching). The question is if these skilled professionals will completely come back to their profession.</p>
	COVID as Time for Recovery	<p>Some professionals used their free time to attend courses, to rest and prepare themselves for the re(start) of tourism activity.</p>
	Growing Awareness of Digital	<p>Due to the pandemic Portuguese tourist guides have noticed how important digitals are and have changed their attitude towards these new technologies. Now, many appear on social media, having websites and some created online tours.</p>
	Prepared for an Evolved Business Model	<p>Not only has their digital performance improved, but they understand that new technologies are not a threat if properly used. They are using them to prepare themselves for the future, allowing the profession to evolve.</p>
	Technological Upskilling	<p>Guides are aware of the importance of education for their performance and understand that new technologies are fundamental in their education. The majority of those who were unskilled have considered the possibility to attend courses to upskill.</p>
	Innovative Products	<p>Many professionals are reaching out to the domestic market by creating innovative and thematic tours, often advertised via social networks.</p>
Agencies and Guides Working Together	Technology Challenging Relationship	<p>The relationship between these 2 stakeholders suffered and will certainly continue to suffer from changes in terms of the performance of both travel agents and tourist guides, mainly due to the fact that new technologies allow a stronger B2C model.</p>
	Ethical Belief in Relationship	<p>Tourist guides are traditionally not used to these new technologies which allow them to reach directly the clients and some still show a certain ethic concern towards travel agents.</p>
	Dependency on Agencies by Guides	<p>Curiously, the ever more independent tourist guides, in spite of their increased competences and the possibility of find themselves their own clients, when working to an agency they are now much more dependent on travel agents’ decisions, because they are both always reachable.</p>
	Faster Communication	<p>Communication between agents and guides is changing due to technological developments. Interaction is quicker and more demanding.</p>
	Certification and Quality	<p>Travel agents in general still consider tourist guides to be an important element for the success of a trip and the most traditional ones still look for certified guides in order to guarantee quality.</p>
	Future Opportunities	<p>These two stakeholders understand that they have potential to offer added value to their services and respond better to current trends of tourism, such as authenticity and sustainability, if they work together.</p>

we have to be aware of the new needs of client and authenticity is a long search if it ever can be achieved in tourism, which will always certainly be an interesting experience, but always somehow an illusory one (TA1).

Some tourist guides also stated:

The fact that people directly book hotel and flights and walk around alone without a tourist guide is not a certainty of a more authentic experience, as so many seem to believe (TG7).

it seems to be complicated to offer authenticity because, as I usually say, when a tourist goes into a restaurant, that restaurant is no longer only for locals as they always ask for (TG10).

tourists tend to believe that uncertified guides or even locals can explain things better to them or in a more genuine way (TG9).

Travelling alone can bring a certain adventure for those visitors who, as defined by Plog (1974), have a more allocentric profile or are more of explorer type, as Smith (1989) refers, but it is not necessarily more authentic, it is just a different way to discover. Visitors must be aware that the single fact of being there and the way they behave or even look at things can jeopardise the authenticity. Travel agencies and tourist guides must together offer itineraries where 'real experience' is presented in the best way possible, contemplating this search for authenticity which has become a current need in tourism.

Sustainability

Sustainability is nowadays a very pertinent issue concerning travel. Travel agencies must look for offers contemplating these current aspects and they are already trying to reduce their ecological footprint by reducing printing in the office, as all of the interviewees referred, choosing their partners among those presenting similar concerns, trying to stimulate the local economy and sometimes when they have financial possibilities, also referred by several interviewees, they try to compensate the

world by offering some help to the communities, which is also most related to social responsibility. On the other hand, tourist guides '... must also play a role in the conservation and enhancement of tangible and intangible heritage' (Santos Veloso & dos Santos Queirós, 2019:311). Guides are now trying to offer more sustainable programs, more and more based on walking tours and using the local economy more. Nevertheless, when tourist guides are working for an agency they have to follow their programs and in that case these aspects must in the first place be contemplated by the travel agency, but then tourist guides have to follow the best practices and encourage visitors also to do so. This means they symbiotically depend on each other for the success of a sustainable itinerary and to transmit a positive image, keeping their position in the ever changing and demanding tourism market.

Future Relationships

Travel agencies and tourist guides must keep working together in this pandemic era of tourism and when the crisis will be completely overcome and tourism will fully restart, they will need to evolve to some other form never thought before. Again, these two tourism stakeholders must continue to collaborate, always showing respect and ethics. It is essential to acknowledge that ethics and quality will always be important and they can only be achieved through education and training as referred by Brito & Farrugia (2020). These are fundamental aspects are often forgotten in a tourism world mostly looking for profit. Some of the interviewed tourist guides said that

probably after this pandemic the first reaction will be to ask for lower prices.

These professionals were afraid that the travel agencies, maybe due to the difficulties inherent to the pandemic, would try to lower their prices and that could have consequences in the incomes of the tourist guides. In the opinion of a tourist guide (TG4) it could even lead to

a bad relationship between travel agencies and guides [since] they were not considering lowering tariffs.

Several of the professional guides defend their position, stating that

quality must always be paid for.

Communication Channels

Another aspect that has been changing is the channels used for communication. In the past, telephone and e-mail were the most common communication channels used by the agencies to find a guide. As tourism is slowly restarting in Portugal, recently some agencies have decided to start using apps such as Facebook or LinkedIn to find a guide, because as explained to the author it is easier and quicker. Many professionals are still not used to do it, but things are changing quickly. This happens mainly because travel agencies have fewer employees, which means that they have less time to contact the tourist guides and that will probably change their relationship in the future. The criteria for choosing a tourist guide will probably be in part influenced by these new technological tools. In the first instance, travel agencies will tend to accept those guides they know well, but later they may start accepting the professionals that respond first, who will be those more connected to new technologies.

As referred by Buhalis and Ujma (2005) the competitiveness and prosperity of intermediaries, such as travel agencies, are mostly dependent on their ability to add value. Weiler and Black (2015b) consider the fact that tourist guides need to be innovative and marketed as a service that adds value in ways that technology cannot. Several authors seem then to agree that the expertise of these two stakeholders in adding value to tourism products will allow them to overcome the difficulties they are both experiencing nowadays (post-COVID-19).

This fact, together with the factors that influence the customers' choices (Cheyne *et al.*, 2005) such as human relationship, the degree of knowledge about the destination and nowadays the current need for constant information about security, will give these stakeholders the chance to survive. Nevertheless, they have to consider that 'only creative and innovative suppliers will be able to survive the competition' (Buhalis, 1998:409). The potential to

survive will be even more effective if both parties keep working together.

Final Considerations

A summary of the main findings of the primary research is presented in Table 2. Mirroring the overall comments and thoughts of the participants, it is clear that in the future

we will see the emergence of new types of tourism businesses, products, services and professions, requiring different competencies, knowledge and personality attributes (UNWTO, 2021b, np)

Tourism professions will have to keep evolving and it can even be said that travel agencies as well as tourist guides are some of those that will have to adapt the most, because their working conditions will probably always be changing. Salazar (2018:115) says that '[t]he context in which tourist guides are operating ... has dramatically changed', which implies the need for different attitudes from these professionals which is exactly the same for travel agents.

The difficulties these stakeholders are facing nowadays are not new, but some of them have been greatly accelerated because of the pandemic. However, these difficulties are not the first ones they have experienced and these tourism professionals have always been very resilient. They constantly have found a way to (re)invent themselves. It is true that traditional travel agencies need some time to respond to new trends and needs, which mainly resulted from the digitalization, but they seem to be succeeding even with strong competition from online services.

Traditional travel agencies seem to be on the right track, depending heavily on quality of service and honesty towards their clients, as stated by interviewees. The pandemic was also a hiatus in their history, but they are trying to use some of the consequences in a positive way. Also their close partners, the tourist guides, have to change their performance as far as communication skills are concerned. They are facing competition from non-certified guides, who

through the new communication technologies can easily reach clients without any quality guarantee. But, quality and ethics are essential and can only be learned through education and training. Tourist guides are responding positively to the difficulties brought by the pandemic and they are trying to make the best out of it, allowing the profession to evolve.

We are living difficult times with huge changes occurring. These different ways of thinking, working, communicating and travelling contribute to a new paradigm in tourism. All tourism stakeholders have to (re)adapt to these new working conditions and traditional travel agencies as well as tourist guides are learning and developing strategies to maintain their position in the global tourism market.

Conclusion

COVID-19 has brought huge challenges for both Portuguese travel agencies and tourist guides. They suddenly had to stop working without knowing when they would be able to start again, which brought them big financial and psychological difficulties, but also their status changed and new needs arose. Digital technologies have become fundamental and new ways of working in tourism have appeared but it is certain that 'both online and traditional distributional channels can coexist in the future' (Law *et al.*, 2004:100).

In general, the attitude towards tourism changed from both supply and demand sides. Never before were people so aware of the importance of travelling for their lives and wellbeing. Travel agencies proved essential for those who want to travel in safety, particularly when health measures themselves made travelling more complicated. Travel agencies will see some positive consequences from this, but it isn't enough to react, it is necessary to act. Travel agencies must be more and more pro-active.

When digital technologies began to impact on tourism, many thought that travel agencies were doomed to disappear because, in their opinion, many

new booking and information possibilities were provided by the new technologies and that would render travel agencies unnecessary, since it was possible for visitors to book several services directly. But, the professionals in travel agencies don't seem to think this way - they are developing strategies and they are certainly adapting. According to Magalhães (2014) there has been disintermediation, but this has been followed by a re-intermediation, which indicates a changing and not a disappearing of traditional travel agencies. Teles (2010) defends that the trend is towards re-intermediation, that is, travel agencies will reposition in the value chain, acquiring new skills and assume new positions of power. These stakeholders who once controlled tourism are certainly suffering from huge competition. But, it seems that they have managed to find new ways to overcome this situation, looking for new markets or creating innovative products. On the one hand new technologies are facilitating the producer-consumer connection which is negative for traditional travel agencies, but on the other hand it also connects the industry to the global world allowing them to easily reach new markets and new opportunities.

For tourist guides these changes have mostly impacted on the way they conceive and perform their profession, taking into account the current need for new and authentic experiences. All this 'challenge(s) and contribute(s) to a redefinition of professional tour guiding' (Salazar, 2018:114). Guides have to look more and more for a B2C perspective and they must pay attention to avoid misunderstandings and unfair situations for travel agencies, which have always been their main partner. '[I]n the traditional system [travel agents] managed the distribution of services and functioned as a guarantee of quality' (Carvalho, 2021:50). It is too early to realise all the consequences of the new attitudes in tourism behaviour, but we can certainly say that nothing will be the same as it was before. Tourist guides must adapt as soon as possible to these new working conditions considering that well trained tourism professionals will be fundamental. This is because,

when planning the development of tourism human capital, it is important ... to note that the human capital needs of the tourism sector today are not the same as the human capital needs of 2030 will be (UNWTO, 2021b:np).

However, good professionals will always be important. These are reasons for certified tourist guides to be considered as important tourism players and incentivised to contribute to the development of a more sustainable, modern and responsible tourism.

The ever existing relationship between travel agencies and tourist guides will always be there, but new strategies ruled by ethics and respect have to be developed to allow tourism to evolve after these current disruptions - COVID-19 and the advent of new digital technologies. There is a general changing attitude towards tourism but quality must be a main focus for all tourism stakeholders and for that they must work as a team. Co-working will always be essential to achieve good results and create a good image in any country intending to be a major tourist destination.

Further Research

The perspective presented in this paper is uniquely from the supply side. It certainly would be very interesting to understand the demand perspective and check if the opinions of the stakeholders agrees with the visitors' opinion. Law *et al.* (2004) have already noted that this kind of study was missing, but lately several studies taking into consideration the clients' opinions have appeared, which have brought more accurate information. Works such as that made by Cheyne *et al.* (2005) or Rajaobelina (2018) are extremely interesting but now the situation has completely changed due to the pandemic. Thus, there is a need for questions to be answered:

How far do health measures influence customers' preferences nowadays?

How deep will be the consequences of the pandemic for future itineraries?

Will all people accept going back to 'normal' tourism, i.e. to mass tourism (either in groups or individually)?

What kind of tourism product will visitors be looking for in the future?

Another interesting research, more focused on tourist guides would be to study the way these tourism professionals in different countries intend to deal with these new trends. Even though these professionals do not seem to believe in a replacement, it would be interesting to study to what extent they will be influenced in their performances by these new post-COVID preferences. Due to major use of new technologies during the pandemic, the following questions could be asked:

Will visitors consider virtual experiences to replace the tourist guide experience?

Will tourist guides be able to successfully use new technologies for their profession?

Will quality really allow these professionals to maintain their position in the tourism market?

How will their relationship with the travel agencies really evolve?

These are all important issues that can be considered for future research, always aiming to give us a better knowledge about these stakeholders, who in the past have both proved to be fundamental for tourism to evolve, but must nowadays perform big adaptations

to be able to keep existing.

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