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# Interpretation Techniques and Eco-Tourism Management Training

Course Manual  
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## An Introduction to Interpretation<sup>1</sup>

Interpretation is simply an approach to communication. Most people think of it as the process through which a person translates one language into another, such as English to Spanish. At a very basic level that's effectively what interpretation is- translating. Environmental interpretation involves translating the technical language of a natural science or related field into terms and ideas that people who aren't scientists can easily understand, and doing it in a such a way that's entertaining and thought provoking. Being entertaining is necessary because interpreters must hold the attention of an audience that is free to ignore them. And provoking thought is important because, according to much research the past twenty years, it is the meanings that visitors make inside their own heads that can lead to interpretation's most important outcomes such as appreciation and caring. It is for this reason that I define interpretation as:

*“a mission-based approach to communication aimed at provoking in audiences the discovery of personal meaning and the forging of personal connections with things, places, people, and concepts.”*

### Interpretation vs. Formal Instruction

Many interpreters struggle to understand that their job is not to “teach” their audiences in the same sense they were taught in school.

A high school science teacher fascinated with rocks and minerals tends to emphasize them in his science classes. He tells his students to read from a geology book so that they'll learn terms he feels they should know in order to identify several kinds of rocks. He also gives lectures using his extensive notes. The students know it's their role to take notes on everything the teacher says during his lectures. There will be an exam soon and they'll be expected to know everything they've learned. In other words, the students will have to demonstrate that they remember the facts they were taught about rocks. This is known as **formal instruction** and is a form of education we all have experienced.

However, if an interpreter uses these methods while guiding a group of visitors in a national park they will be bored. No matter how much she tries to “teach” the tourists, they'll seem to be more interested in taking photographs or admiring the landscape. The problem is not the interpreter, but the type of audience she is dealing with.

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<sup>1</sup> By Sam Ham, Courtesy of FreeNomads.com

## Captive vs. Non-Captive Audiences

The audiences the teacher and the interpreter are working with seem to be similar –both are well educated and enthusiastic about natural science. What is the difference?



People act according to the environment or situation they're in. Where we are influences much of our behavior including how we talk and act, what we're interested in and what kinds of behavior we expect from other people. Although there are many physical differences in the two settings, there's one overriding psychological difference. **The classroom is a setting in which the audience has to pay attention while the national park is one in which it doesn't.**

Boiled down to a single defining characteristic, it may be said that the **students in the classroom are a captive audience** because they're forced pay attention if they want to get good grades. They've come to expect and to accept certain forms of learning that they associate with the classroom setting. On the other hand, the **visitors at the park are a non-captive audience** because they don't have to worry about grades. **If they decide to stay and pay attention, it will be only because they want to.** If the presentation isn't interesting, if it seems too academic, or if it requires too much effort to follow, they probably won't pay attention.

## Differences Between Captive and Noncaptive Audiences

### Captive Audiences

- Involuntary audience
- Time commitment is fixed
- External rewards important
- Must pay attention
- Will accept a formal, academic approach
- Will make an effort to pay attention, even if bored
- Examples of motivations:
  - grades
  - diplomas
  - certificates
  - licenses
  - jobs/employment
  - money
  - advancement
  - success
- Typical settings:
  - classrooms
  - job training courses
  - professional seminars
  - courses required for a license (e.g., driving)

### Noncaptive Audiences

- Voluntary audience
- Have no time commitment
- External rewards not important
- Do not have to pay attention
- Expect an informal atmosphere and a nonacademic approach
- Will switch attention if bored
- Examples of motivations:
  - interest
  - fun
  - entertainment
  - self-enrichment
  - self-improvement
  - a better life
  - passing time (nothing better to do)
- Typical settings:
  - parks, museums, reserves, etc.
  - extension programs
  - at home watching television,
  - listening to radio, reading a magazine

## The Interpretive Approach to Communication

In order to effectively deliver information to non-captive audiences, we need to rely on the interpretive approach of communication. Interpretation has four qualities that distinguishes it from other forms instruction. These are:

### 1. Interpretation is pleasurable

Although entertainment isn't interpretation's main goal, it's one of its essential qualities. All good communication is entertaining in the sense that it holds its audience's attention. One thing, which seems to stand out in all successful interpretation is that it's informal and not classroom-like. Interpreters can create an informal atmosphere in many ways. Starting with the use a conversational tone of voice and avoiding reading from notes.



Exhibits are also important, given they are game-like, participatory, three-dimensional and/or contain movement, changing scenes or lively colors-all characteristics more commonly associated with entertainment than with traditional classroom media, as well as audiovisual aids.

### 2. Interpretation is relevant

Information that's relevant to us really has two qualities: it's meaningful and it's personal. Information is meaningful when we're able to connect it to something already inside our brains. Meaningful information is said to have "context" since we understand it only in the context of something else we already know. A bridge between the unfamiliar world of let's say, geology and things the audience knows. These bridges can be examples, analogies and comparisons.

Just as important as making the information meaningful is making it personal. Interpreters must also link the information being presented to something their audience cares about as well. With non-captive audiences, this is especially important because they'll almost always ignore information that seems unimportant, even if they understand.



Non-captive audiences can be expected to switch their attention to any information that is highly personal. Highly personal topics include ourselves, our families, our health, our well-being, our quality of life and our deepest values, principles, beliefs and convictions, therefore some tools like self-referencing (“Think of the last time you...”; “Have you ever...?”; “How many of you have ever...?”) and labeling, or classifying people (“People who understand the value of a forest know that...”; “If you don’t care about protecting endangered species, then you probably don’t believe that...”; “People who live in the Northwest...”). When the label is issued, most people in your audience will either associate themselves with it, or disassociate themselves from it. Be thoughtful when using labels, though. They classify people and, therefore, have the potential to offend if they’re not chosen carefully.

### 3. Interpretation is organized

Information has to be presented in a way that is easy to follow. Another way of stating this idea is that interpretation, at its best, doesn’t require a lot of effort from

the audience. Non-captive audiences will switch attention if they have to work too hard to follow a train of thought.

#### 4. Interpretation has a theme

Interpretation is thematic if it has a major point. The theme is the main point or message a communicator wants an audience to think about. It's like the moral to the story the interpreter wants to tell. Experienced interpreters will tell you that there are few, if any, concepts more important than "theme" when it comes to selecting and organizing ideas for a presentation. A **theme** is not the same as a **topic**.



Virtually any presentation of ideas can (and should) have both a topic and a theme. Their major difference is that the topic ("soil erosion and sedimentation") is merely the subject matter of the presentation whereas the theme ("soil erosion not only threatens agriculture, it threatens our water, fisheries, and major shipping corridors") is the

main point or message a communicator is trying to convey about that topic. Before a non-captive audience can understand this theme, of course, they must have a pretty clear idea of: (1) what soil erosion and sedimentation are and how they're related; (2) how soil erosion affects agriculture; (3) how sediment affects drinking water; (4) how sediment affects fish habitat; and (5) how sediment affects shipping lanes. So you can see that an interpreter's choice of theme naturally provides insight into the information needed and how it might be organized.

Themes should:

- a) Be stated as complete declarative sentences
- b) Capture one whole thought-provoking idea
- c) Reveal the overall focus of the presentation
- d) Be interestingly worded, using active visual verbs if possible
- e) Be easy to process and understand

Examples of themes are:

- With every sip of this wine, the blood and toil of our ancestors become part of you.
- Our children need us to take care of their natural resources.
- Preserving biodiversity is like having a life insurance policy.
- Three kinds of frogs live in this forest, and knowing which is which could save your life.
- All animals are built to survive, but some make it and some don't.
- One of nature's most successful experiments was its creation of the clam.
- Energy is found in various forms, some very surprising.
- Energy flows in only one direction, and is neither created nor destroyed.
- Blue grass makes our water cleaner.
- Everything is on its way to becoming something else.

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## **B. Naturalist Guides — the Heart of Protected Area Tourism<sup>2</sup>**

### **Introduction**

Naturalist guides play a central role in the implementation of the ecotourism concept. They are the principal providers of the educational element to the ecotourism activity, and their capacity and commitment ensures that the negative impacts of tourism are minimized.

At the same time, guiding is an obvious economic opportunity for people from local communities. These and other important benefits underline the importance of a protected area establishing and implementing a naturalist guide training and licensing program.

### **Background**

The use of tour guides in protected areas is not a new phenomenon. Guides have been a part of nature tourism in many places for many years. They have accompanied tourists on safari in East Africa for several decades. They have traveled with tourists on the boat tours which millions of visitors have enjoyed on the Patagonian lakes of Argentina, particularly in Nahuel Huapi National Park. These tour guides usually were employed by private tour operators and had little or no relationship to the protected area they worked in.

Over the years, this situation began to change as protected area managers realized the potential for using guides to increase contact with visitors and for accomplishing other ecotourism objectives as well.

### **The Roles of Naturalist Guides**

Naturalist guides truly play a multifaceted role. They have responsibilities to their tour operator employers, to their clients the visitors, and to the protected areas and communities where they work.

Tour operators count on guides to provide experience-enriching interpretation of natural and cultural attractions to add value to the tourists' itinerary. They also require guides to manage logistical aspects of trips in the field, such as coordinating with accommodation, food and transport service providers. Guides are responsible for the tourists' safety and in general represent their tour operator employer in the field.

Tourists look to the naturalist guide for information, interpretation and insight about the places they are visiting; for help preparing for a visit through formal

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<sup>2</sup> By Andy Drumm and Alan Moore

briefings and informal talks; and generally to be a friendly, knowledgeable intermediary with unfamiliar places and people.

Protected area authorities look to the guides as extensions of the park ranger staff, to educate the visitors, to protect the natural and cultural resources of the area visited, to participate in monitoring programs and generally to support the conservation objectives of an area.

In addition to these roles, a naturalist guide should seek to inspire visitors to become supporters of conservation.

### **Nature Interpreters**

Environmental interpretation is a subset of communication that focuses on how best to explain environmental/ecological concepts to the general public. One of the central tenets of ecotourism is to educate the visitor.

Naturalist guides, who spend a considerable amount of time with visitors, are in a perfect position to educate through skilled interpretation. Many local residents have a detailed knowledge of the plant and animal life as well as of other natural and cultural attractions. They can also relate first-hand experiences with wildlife, medicinal plants and other local phenomena.

### **Conservationists**

As the main contacts that visitors may have with an ecotourism site, guides serve as important role models both to visitors and their own communities. Their attitude and behavior send an important message to others about the ecotourism concept. Does the guide pick up pieces of trash along the hiking trail? Does the guide actively support and cooperate with site managers by reporting illegal activities? Does the guide adapt ecotourism to his/her own home and community situation?

Some tour guides make a point of discussing the importance of conserving the incredible diversity found at a site, what the major threats to it are and what visitors might do to help conserve it.

### **Park Rangers**

Unfortunately, not all visitors to ecotourism sites know how to behave appropriately in sensitive natural and cultural settings. It is the guides' responsibility to ensure that visitors are aware of all applicable rules and regulations as well as other relevant ethical considerations. In a polite but firm manner, they must make sure that visitors comply with whatever restrictions there may be. This is perhaps the most difficult role that guides have because their major responsibility is to help provide visitors with an enjoyable experience. As members of the private sector, it can, in rare situations, create a conflict of interest between the guides' conservation obligations and their obligation to the visitor and, in some cases, their employer.

For example, a tour operator might promise clients a close encounter with a whale, but a guide may judge that at a given moment the whales seen in the distance are nursing young and should not be approached. The guide's obligations to an employer and to a park authority might be divergent at this point. Guides need special training in how best to deal with these situations. They also must be vested with the authority to report and deal with infractions of rules and regulations.

### **Monitors of Tourism Impact**

Since guides visit the protected area on a frequent basis, they are in a unique position to notice certain kinds of impact, such as trail erosion, increasing rareness of a particular bird species, etc. They are also in an excellent position to carry out formal monitoring observations for the site's managers. In many places, guides take the time to carry out observations of the number of nesting birds or of the regeneration of a plant species in a designated quadrant. This can be of valuable assistance to a site's managers when they are short-handed or simply do not have trained personnel to carry out these tasks.

### **Liaison with Local Communities**

When guides are from local communities, they can serve an important role in improving communication between the site's administration and local people. This is particularly important when there may be some misunderstanding between the two different "communities," which there frequently is. Naturalist guides in the Galapagos Islands and other places have established their own organizations to further conservation objectives. In the Galapagos Islands, they have been especially helpful in obtaining local support for the Park Service in the face of illegal fishing activities originating outside the islands.

### **Conditions for a Successful Naturalist Guide System**

In order for a naturalist guide system to work well in an ecotourism site situation, several conditions must be met.

#### **Control and licensing**

The Park must have effective control over the use of guides and the conditions under which guides will operate within the Park. This implies that managers either own the Park or that there is legislation or some other legal mandate for exercising this control. Most effective guide systems have a licensing mechanism. The Park's administration, or some higher authority acting at the administration's request, will issue a license to guide visitors within the Park if the guide complies with relevant rules and regulations. The Park's administration reserves the right to suspend or revoke the license if a guide's behavior is inappropriate. Licenses are usually extended to those individuals who pass a training course or a test. The Park's administration reserves the right to set other criteria for attending a training course, such as: being a member of a local community, being of a minimum age, the absence of a police record and having a minimum level of education.

It is important to avoid flooding the market with too many licensed guides as this would force down wage levels as many compete for an insufficient number of jobs. However, it is necessary to have a sufficient number of guides to satisfy demand; a rough guide would be to license about 25% more guides than will be working each season.

### **Mutual benefits**

In spite of the control that the Park administration must exercise over the guides' activities, the relationship between them should be more than one of employer and employee. Both the Park administration and the guide have much to offer each other, and they should actively carry out their respective roles in order to benefit from each other's work. Unfortunately, it is not uncommon for one side or the other to lose sight of their mutually supportive roles and for the relationship to become non-productive. Constant and positive feedback is the best way to avoid this situation. Involving tour operators and guides in the ecotourism program planning process from the beginning is also crucial.

### **Training**

Naturalist guides need training in order to fulfill the many roles they are charged with. The primary themes for a training course curriculum are listed below.

#### **- Natural history of the site and surrounding areas.**

What are the major species, plant and animal communities and ecosystems? How do they interact with one another? What is their conservation status?

#### **- Cultural attractions.**

What are the historical, archaeological and traditional cultural activities that can be found in the site and surrounding areas? What is the relationship between natural and cultural attractions?

#### **- Site conservation priorities and activities.**

Guides should be able to explain to visitors what the site's management is doing to further the conservation of the natural and cultural resources found in the site as well as how the site relates to other protected areas and the surrounding communities.

#### **- Rules and regulations.**

Guides need to be aware of all the rules and regulations governing public use of the site and its facilities. In particular, they need to be aware of what ecotourism is and how it is applied at this site.

#### **-Group management.**

All guides need to learn how to best manage a group of visitors that can have widely varying attention spans and reasons for being there. Maintaining everyone's attention and keeping the group together can sometimes be a major chore. Experienced guides are sometimes the best people to teach this part of the course.

- **Interpretive communication techniques.** There are very special techniques for communicating ideas to a group of disparate people. Learning the techniques comes easily for some guides; for others, a significant amount of time will need to be spent.

Training should not be a one-time event for guides. Good guides should be continually refreshing and updating their knowledge, and the site's administration should consider carrying out periodic courses for this purpose. Courses should be developed with, and at least partly financed by, the tourism industry. In addition to specialists in each of the themes outlined, tour operators should be instructors in courses, as should older, respected members of the local community.

Young men often dominate the competition for places in guide training courses, but it is important to ensure that women participate too. They make good guides, and at least 50% of tourists are women!

Rare with the support of The Nature Conservancy, has developed a comprehensive guide training manual that is highly recommended (RARE, 2001).

### **Guide availability**

Ecotourism encourages the inclusion of local people in as many circumstances as possible. While it may be useful to utilize local people as naturalist guides, managers should realize that residents may not be "natural" naturalist guides. Their interests or educational levels may be obstacles to reaching the level of expertise required of guides at a site. Significant training may be needed before they can function effectively.

### **Work availability**

Work availability is a very sensitive issue in many situations. Naturalist guides have the potential to earn significantly more money than other members of their community. For this reason, when a site initiates a naturalist guide system, there are sometimes many more candidates than available work. Managers must be careful not to create high expectations among guide candidates, especially if visitor numbers are not sufficient to guarantee work for everyone. If some candidates for a training course are selected over others who appear to have similar qualifications, conflicts may arise. Park managers may do several things to minimize these problems:

- Ensure that specific criteria are used to select guide candidates and that the criteria are strictly followed.
- Limit training course size to a specific number of people and accept candidates on a first come, first serve basis.
  
- Initiate policies that encourage or mandate the use of local guides in the ecotourism site or in specific locations or zones within the site. This may cause conflicts with other, non-local guides. See the following section on “Local vs. non-local guides.”
  
- Encourage the creation of a naturalist guides association that will help to organize guides and their response to a limited number of guiding opportunities, e.g., a system of rotation. This is also an excellent way to minimize cutthroat competition and to standardize prices. The site could mandate that guides charge only a certain amount for a given service, but the mandate would be better received and complied with if the guides were allowed to determine their own price structure.

### Local vs. non-local guides

It is not uncommon for organized tours to arrive at a Park with a guide who works with the tour company and comes from the capital city, or even another country. Sometimes these guides are very knowledgeable about the site, but many are not. However, local community members should be given priority for positions as naturalist guides. In the case of areas that are ancestral lands of local communities, hiring a trained local naturalist guide should be obligatory.

If tour operators require higher level scientific interpretation, they may choose to hire a university educated non-local guide to also accompany their clients. Training courses for local guides will likely emphasize different themes than courses for university-educated naturalists.

If the situation is developed appropriately, guides from both categories can learn a lot from each other. Regardless, all guides should take and pass the training course and be licensed. It should be mandatory to train and provide licenses to local guides.

### Language skills

Local guides can face a language barrier since most tourists are from another country, usually one where a different language is spoken. Local guides can be very ingenious at communicating with visitors whose language they do not speak. However, they cannot express themselves at the level that a high quality naturalist guide would need to communicate effectively, e.g., expressing complex ideas and concepts.

When the Galapagos Islands naturalist guide system began, most local guides did not speak any English. Today, more than 30 years later, later, almost all of them speak some English or another European language. Some of these guides learned another language on their own by listening and talking to visitors, others took special courses. This ability to communicate in another language has also increased the fee they can charge.

A pool of trained and licensed naturalist guides can be a tremendous asset to protected area conservation. Creating a naturalist guide program should be a high priority for all sites with an ecotourism program.

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