

# HERITAGE INTERPRETATION AND SUSTAINABLE MANAGEMENT OF TOURISM IN RURAL AREAS. THE CASES OF MONTEJO DE LA SIERRA AND PATONES

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## I. INTRODUCTION

There are a variety of instruments for promoting sustainable tourism such as codes of good practice, ecolabelling (Fullana & Ayuso, 2002) or the zoning of protected natural areas (Wearing & Neil, 1999). Having regard to the objectives, methods and potentialities of Heritage Interpretation (HI), it can also be an effective instrument for the sustainable development of tourism.

HI emerged in connection with the planning and management of National Parks in the United States. This initial function has now been combined with transforming heritage into a cultural or tourism product. HI is a process of communication that seeks by means of revelation and persuasion to conserve a heritage item or site (Morales & Ham, 2008). It is addressed to the general public, meaning casual, unmotivated, non-captive visitors with limited time. To enable visitors to make connections with heritage requires an appropriate message and the use of interpretation techniques. The means of interpretation also have to be selected (Spanle, et al, 1974), such as guided tours, exhibits, self-guided trails and visitor centres.

Eagles et al. (2002) and Ham (1992) note the role of HI in managing tourism at sites of heritage value. In the documentation reviewed there are cases with positive results such as the experiences of the Lindblad Expeditions, or of Fermata, Inc at the University of Idaho that shows how HI contributes to reducing invasive species (Kohl, 2009). Other authors postulate its potential capacity for reducing visitor impacts in protected areas (Muñoz & Benayas, 2008). From a theoretical perspective, HI contributes to sustainable tourism in its environmental, social and cultural dimensions, and makes a particular contribution to the conservation of the

heritage item or site and the place where it is located as it modifies the harmful behaviour of visitors (Kohl, 2009). HI can reduce the impact of the cultural and tourism use of heritage and improve its condition (Ham, 1992; Eagles et al, 2000), make it easier to manage the flow of visitors, prevent the exposure of items, and limit the independent access of visitors. It also disseminates heritage management policies (Morales. et al., op. cit.), helps to increase visitor satisfaction (Ham, 1992; Morales 1998; Eagles et al, 2002), promotes the creation of new employment niches and opportunities, generates economic activities with a high added value, encourages the specialisation and theming of destinations and products, and is an effective instrument of communication, commercialisation and territorial promotion (Castaño, 2005).

In Spain HI is a very young discipline and examples abound where its application generates hardly any impact on the development of sustainable tourism. In many cases this situation is the result of poor design; in others, because it is merely used as an instrument to valorise heritage. We address this issue below using two case studies of rural municipalities in the Autonomous Community of Madrid.

## **II. METHODOLOGY**

The research performed (2007-2012) was based on two working assumptions: “HI has begun to be used as a tourism management tool in Spanish rural areas” and “HI can be an effective tool for the sustainability of tourism in rural areas”.

First of all a documentary approach was taken to the problem on the basis of the proposals of the Spanish Association for Heritage Interpretation [Asociación Española para la Interpretación del Patrimonio (AIP)], and by means of two case studies conducted in Patones and Montejo de la Sierra (Autonomous Community of Madrid, Spain) that were designed to evaluate the use of HI at destinations with sustainable tourism problems. Fieldwork was done to evaluate the situation of the tourism, identify the problems generated by the activity, ascertain the perception of the players involved, assess the measures adopted and the impact of those that included HI. Visitor centres and trails were also assessed paying special attention to the attributes that define the quality of the interpretation. The work applied 51 indicators grouped into six factors (management, design of the facilities, design of the medium and group, HI techniques applied, message and general evaluation of them) and evaluated the corrective measures applied, the use of HI and its contribution to sustainable tourism management and planning.

The results provided an overview of the problems that includes core aspects of the use of HI as an instrument for sustainably managing tourism in rural areas.

## **III. PROBLEMS FOR THE SUSTAINABILITY OF TOURISM IN THE MONTEJO BEECH FOREST AND PATONES DE ARRIBA. AN ASSESSMENT OF THE APPLICATION OF INTERPRETATION**

Both the Montejo beech forest and Patones de Arriba possess protected natural and cultural heritage, they are located not far from Madrid, are micro-destinations for weekend trippers, are the main focuses of tourist attraction in their municipalities and are subjected to intense anthropic pressure.

The Montejo beech forest is a protected area of 250 ha (Natural Site of National Interest, 1974) which forms part of the Sierra del Rincón Biosphere Reserve. It is located at Montejo de la Sierra (area 31.3 km<sup>2</sup> [19.4 mi<sup>2</sup>] and 300 inhabitants) 90 km [56 mi] from the city of Madrid. The results of tourism development projects, the promotion of tourism by the local and regional authorities, the impact of indiscriminate promotion strategies and external factors gave rise to a rapid increase in visitors to the beech forest towards the end of the 1980s. Since then, solutions have been sought to mitigate problems arising from an excessive, seasonal influx of visitors and to extend the benefits of tourism to the municipality as a whole.

Patones (34.5 km<sup>2</sup> [21.4 mi<sup>2</sup>]) is only a short distance from Montejo and 65 km [40 mi] from Madrid. It has two small communities: Patones de Abajo (500 inhabitants) and Patones de Arriba (barely a dozen inhabitants), which was declared an Asset of Cultural Interest in 1999 and is where the tourism is focused. The development of tourism at Patones de Arriba was spontaneous and disorderly, with excessive supply and demand concentrated in a small area. This soon led to problems of environmental congestion and saturation of infrastructures, excessive specialisation in culinary tourism, a sharp increase in the price of housing and an overwhelming predominance of outside businesspeople that causes tensions with the local population.

Analysis of the perception of the players involved reveals as the main problems perceived, in both cases, those of regular traffic congestion and vehicle parking, and in second place those relating to the management of the tourism. The results also evidence the absence of references to the degradation of the heritage visited, a gap that is significant for three reasons. The first is that none of the groups involved raised any problems in this respect. The second is that a good part of the problems perceived result in processes of degradation of the heritage, and the third, that such a conspicuous absence prompts consideration of the failure of the measures applied that incorporated HI, because they have not even succeeded in making the players involved aware of these issues.

In order to deseasonalise tourism and extend its benefits beyond the current focuses of attraction (the beech forest and Patones de Arriba) a series of actions were taken incorporating HI. The measures applied by the managers of the beech forest include the system of guided tours, and the layout of self-guided walks in the area. The local authority has set up a visitor centre and alternative trails. In Patones a visitor centre was set up, the path between Patones de Arriba and Patones de Abajo was laid out as a self-guided walk, and an open-air "Slate Eco-Museum" was set up, valorising heritage of Patones de Arriba.

Although the predominant theoretical approach of applying HI is for heritage conservation, the analysis of services and facilities reveals a quite different reality. The evaluation of the measures incorporating HI reveal clear differences between Patones and Montejo. At Montejo, HI has predominantly been used as an instrument for heritage conservation and most of the services and facilities are managed by specialist nonlocal agencies under contract with the Regional Government of Madrid. In Patones, on the other hand, the use of HI is focused on valorising the heritage, and the services and facilities are managed by a local authority that lacks sufficient specialist human resources.

The results obtained show significant differences in the use and application of HI and make it possible to draw a general conclusion: most of the examples analysed do not meet the quality standards for them to be considered interpretive services. It is only in the guided

tours of the Montejo Beech Forest that HI principles are properly applied, which is not the case with the other resources located in the municipality. In Patones, the shortcomings are common to all of the services assessed. The results also reveal three important issues as regards the sustainability of tourism and the use of HI. The first is the widespread use of HI as an instrument for valorising heritage, an approach that reduces its potentialities as a tool for the planning and sustainable management of tourism. The second is that the best rated resources are personnel services staffed by specialist technicians. The third is that the majority of resources display problems of upkeep and conservation.

#### IV. CONCLUSIONS

Confirmation is obtained of the assumption that “HI has begun to be used as a tourism management tool in Spanish rural areas”. However, it is most often used to valorise heritage and there are few experiences of using it as a tool of conservation. These two issues are to be found at both Patones and Montejo de la Sierra. Only a minority of tourism services use it to direct and control the flow of visitors, encourage changes in “values” and attitudes of respect and conservation towards heritage. Most of them use the label “interpretive” without meeting the necessary objectives and principles for them to be defined as such.

With regard to the degree of fulfilment of the assumption that “HI can be an effective tool for the sustainability of tourism in rural areas”, it is wise to consider the theoretical contributions presented and results obtained in the case studies. If Kohl (2009), Muñoz & Benayas (2008); Eagles et al. (2002) and Ham, (1992) note the role of HI in the management and conservation of heritage, the case studies of Patones and Montejo make it possible to identify potentialities and shortcomings in the application of HI in terms of tourism sustainability. In both cases, most visitors who use HI services consider that they help them to learn about the municipality and value it more, two objectives of the discipline. In this respect, it should be borne in mind that HI has limitations and must be supplemented with other sustainability tools. Ultimately, resolving the problems of Patones and Montejo requires measures that combine direct management strategies, others of communication, such as HI (Muñoz & Benayas, 2008), as well as strategies for the territorial planning of tourism.

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