

METHODOLOGICAL APPROACHES TO THE INTERFACES BETWEEN HISTORY AND TOURISM

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Abstract

This article aims to identify, categorize, and analyze the main methodological approaches used in historical research on tourism over the past decade, contributing to the consolidation of tourism historiography. Anchored in the interface between history and tourism studies, the discussion emphasizes methodological plurality and interdisciplinary dialogue, incorporating perspectives from historiography, sociology, anthropology, geography, and cultural studies. The research adopts an inventory-based, descriptive, and analytical approach, grounded in a systematic review of scientific publications indexed in Web of Science, Scopus, Redalyc, Scientific Periodicals Electronic Library (SPELL), and the Tourism Publications Portal. The findings reveal a predominance of content analysis, descriptive historical narratives, and oral history/interviews, alongside less frequent but still relevant methods such as participant observation, audiovisual analysis, comparative approaches, and iconographic investigation. The study concludes that this methodological diversity reflects the complexity of tourism as a social phenomenon and highlights that, although selecting appropriate methods remains a central challenge for researchers, mastering these methodological tools enables new interpretations of tourism's past and strengthens its theoretical and practical relevance within contemporary historical and social research.

Keywords: Tourism; Tourism history; Research methodology; Historiography; Interdisciplinary studies.

ABORDAGENS METODOLÓGICAS NAS INTERFACES ENTRE HISTÓRIA E TURISMO

Resumo

Este artigo tem como objetivo identificar, categorizar e analisar as principais abordagens metodológicas empregadas nas pesquisas históricas sobre o turismo ao longo da última década, contribuindo para a consolidação da historiografia do turismo. Ancorado na interface entre história e estudos do turismo, o trabalho enfatiza a pluralidade metodológica e o diálogo interdisciplinar, incorporando contribuições da historiografia, da sociologia, da antropologia, da geografia e dos estudos culturais. A pesquisa adota uma abordagem de caráter inventariante, descritivo e analítico, baseada em uma revisão sistemática de publicações científicas indexadas na Web of Science, Scopus, Redalyc, Scientific Periodicals Electronic Library (SPELL) e no Portal de Publicações em Turismo. Os resultados indicam a predominância da análise de conteúdo, da narrativa histórica descritiva e da história oral/entrevistas, além de métodos menos frequentes, porém relevantes, como a observação participante, a análise audiovisual, as abordagens comparativas e a investigação iconográfica. Conclui-se que essa diversidade metodológica reflete a complexidade do turismo como fenômeno social e evidencia que, embora a escolha do método adequado permaneça um desafio central para os pesquisadores, o domínio dessas ferramentas possibilita novas interpretações do passado do turismo e fortalece sua relevância teórica e prática nas pesquisas históricas e sociais contemporâneas.

Palavras-chave: Turismo; História do turismo; Metodologia de pesquisa; Historiografia; Estudos interdisciplinares.

ENFOQUES METODOLÓGICOS EN LAS INTERFACES ENTRE HISTORIA Y TURISMO

Resumen

Este artículo tiene como objetivo identificar, categorizar y analizar los principales enfoques metodológicos empleados en las investigaciones históricas sobre el turismo de la última década, con el fin de contribuir a la consolidación de la historiografía del turismo. A partir de la interfaz entre la historia y los estudios del turismo, el análisis destaca la pluralidad metodológica y el diálogo interdisciplinario, incorporando aportes de la historiografía, la sociología, la antropología, la geografía y los estudios culturales. La investigación adopta un enfoque inventariante, descriptivo y analítico, sustentado en una revisión sistemática de publicaciones científicas indexadas en Web of Science, Scopus, Redalyc, Scientific Periodicals Electronic Library (SPELL) y en el Portal de Publicaciones en Turismo. Los resultados evidencian la predominancia del análisis de contenido, la narrativa histórica descriptiva y la historia oral/entrevistas, junto con métodos menos frecuentes pero relevantes, como la observación participante, el análisis audiovisual, los enfoques comparativos y la investigación iconográfica. Se concluye que esta diversidad metodológica refleja la complejidad del turismo como fenómeno social y demuestra que, aunque la selección del método más adecuado sigue siendo un desafío central para los investigadores, el dominio de estas herramientas permite nuevas interpretaciones del pasado del turismo y fortalece su relevancia teórica y práctica en la investigación histórica y social contemporánea.

Palabras clave: Turismo; Historia del turismo; Metodología de investigación; Historiografía; Estudios interdisciplinarios.

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1 INTRODUCTION



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From the perspective that “everything that exists connects the present and the past by the very fact of its existence” (Santos, 1988, p. 252), and considering that “tourism is a phenomenon of experiences lived in different ways and desires by the individuals involved” (Panosso Netto, 2005, p. 30), this study seeks to present the main methodological approaches employed in historical research on tourism over the last ten years.

The study of tourism’s past requires an understanding that such research deals with events and their interpretations, which shaped the history of individuals responsible for writing the present, producing discourses, and selecting—or excluding—characters, facts, and events.

Barreto (2003) discusses the main theoretical contributions of the social sciences to the comprehension of tourism, here analyzed from the perspective of social history. In this regard, the aim is to uncover part of the “silences of the past” (Pollak, 1989) in relation to tourism. The tourist gaze is therefore understood as being shaped by society, social groups, and the historical period experienced (Urry, 2001), while tourism itself is conceived as the displacement of people (Barreto, 2003) through a heterogeneity of social practices (Pastor, 2003).

Historical studies of tourism remain a relatively unexplored field within tourism and leisure research, as many scholars do not yet fully recognize the importance of historical approaches for understanding the present (Towner & Wall, 1991; Barreto, 2003; Walton, 2009; Timothy, 2012; Guimarães, 2013; Bastos, 2020). Consequently, this research can be considered an attempt to reveal some of the “underground memories” of Brazilian and international tourism (Pollak, 1989).

In Latin America, historical research on tourism gained momentum in the early 21st century, with scholars employing new methodologies and analyses that expanded the debate on the region’s early manifestations of tourism (Guimarães, 2013).

Towner and Wall (1991) indicate that historical studies on tourism and travel in the major European research centers were concentrated in three areas: the ancient and medieval worlds; the Grand Tour of the 17th and 18th centuries; and the growth of spas and European seaside resorts.

In the North American context, according to Towner and Wall (1991), historical tourism research has been more limited, with few scholars working in isolation and much of the corpus focused on accounts by early travellers and immigrants of their experiences in the New World.

In Brazil, Guimarães (2013) mapped the national historiographic production on the subject between 2009 and 2012. The results indicate that these works developed critical and analytical frameworks for writing a problem-oriented history, seeking “to understand tourism within the specificities of its time, without establishing superficial generalizations.” The author’s panorama reveals that most studies focus on the period between the 1930s and 1960s, with the Southeast region of Brazil as the primary spatial focus (Guimarães, 2013, p. 101).

Tourism as a social phenomenon “presents diverse spatial and territorial imbrications, subject to various analyses depending on the proposed scale of observation” (Fratucci, 2000, p. 121). As such, tourism is understood as a social

practice and an urban phenomenon consolidated in modernity, requiring critical, problematized analysis.

In this sense, the “producers of tourism are composed of individuals, social groups, companies/firms, and institutions with the power to generate an effect on the phenomenon and/or on the tourism activity, with the capacity to intervene, modify, or influence its course” (Fratucci, 2008, p. 76). Tourism can therefore be conceived as a phenomenon shaped by social practices inherent to human relations and permeated by history.

Bastos (2020) discusses the potential of primary sources for studying the history of Brazilian tourism. Through these new approaches to consultation and analysis, it becomes possible to interpret the past through the lens of the present. It must be remembered, however, that in historical research, the recovery of memory reproduces only part of what was experienced, and not its totality (Pollak, 1989; Santos, 2003; Timothy, 2012; Guimarães, 2013).

2 METHODOLOGY

This research is characterized as inventory-based, descriptive, and analytical. The methodological procedures adopted were guided by the five steps proposed by Chueke and Amatucci (2015).

The first step was to design the research protocol, which required establishing guiding questions. The central question formulated for this investigation was: “What are the main methodologies employed in studies on the history of tourism?” The second step involved identifying the most relevant studies in the field. In this regard, Guimarães (2013) provided an important reference through her analysis of the state of the art in historical research on tourism, which also helped delimit the temporal scope of the present study.

The third step focused on defining inclusion and exclusion criteria for the research results. The established protocols included selecting specific keywords: “história do turismo” in Portuguese, “history of tourism” in English, and “historia del turismo” in Spanish. The databases chosen for the systematic search were Web of Science, Scopus, Redalyc, Scientific Periodicals Electronic Library (SPELL), and the Tourism Publications Portal.

The fourth step involved the systematic search, carried out in January 2022. The search was restricted to articles published in peer-reviewed academic journals over the previous ten years, using the article title, keywords, and abstract fields across all databases. The search initially identified 587 articles. After eliminating duplicates, 355 remained for screening through title and abstract reading. Ultimately, 82 articles were selected for in-depth analysis as they were aligned with the research theme.

The fifth step consisted of synthesizing and analyzing the data. To systematize the findings, a database was created in Microsoft Excel to facilitate the organization and comparison of methodological trends. This step culminated in the qualitative interpretation of the results, which are presented in the subsequent section.

The second stage of the process involved a detailed analysis of the selected works, focusing on the information directly related to the research objectives (Afonso et al., 2011; Chueke & Amatucci, 2015). Specifically, this article

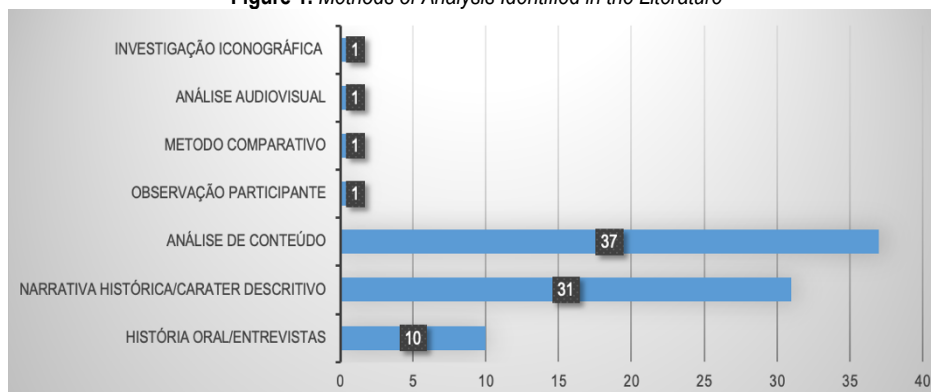
focuses on identifying and discussing the methodologies most frequently adopted in historical research on tourism.

3 RESULTS

The historiography of tourism has been shaped by the discipline's refinement, the development of new methods and techniques of investigation, and the growing interest in transdisciplinary themes (Guimarães, 2013). The corpus

analyzed in this study reveals significant methodological diversity. Among the 82 works selected, content analysis emerged as the predominant method (37 occurrences), followed by descriptive historical narrative (31 occurrences), oral history and interviews (10 occurrences), and, in smaller numbers, participant observation, audiovisual analysis, the comparative method, and iconographic investigation (5 occurrences).

Figure 1. *Methods of Analysis Identified in the Literature*



Note. Authors' own elaboration based on the reviewed literature.

This distribution indicates a trend toward the consolidation of content analysis as a central tool in historical tourism research. At the same time, the continued presence of descriptive narrative reinforces the importance of historiographical traditions that remain fundamental for understanding tourism as a social phenomenon across different contexts and time periods. The use of oral history and interviews highlights a growing concern with valuing collective memory and individual experience, offering opportunities to recover perspectives often silenced in official sources.

Although less frequently applied, methodologies such as audiovisual analysis, participant observation, and iconographic investigation expand the field, revealing innovative and interdisciplinary approaches that strengthen the interface between tourism, cultural history, and anthropology. These methods allow researchers not only to examine historical records but also to interpret the symbols, representations, and social practices that shaped tourism over time. As Guimarães (2013, p. 100) observes, "the historiography of tourism is guided by the refinement of the discipline, its methods and techniques of investigation, and the interest in new topics, many of a transdisciplinary nature, developed through problematization and methodological rigour."

The distribution of methods identified in this study is illustrated in Figure 1. Of the total, 37 studies applied content analysis, 31 used descriptive historical narrative, 10 relied on oral history and interviews, while only 5 incorporated participant observation, audiovisual analysis, the comparative method, or iconographic investigation.

Archival research, which underpins many of these studies, requires adopting diverse approaches to interpret data contained in historical sources. As Timothy (2012) emphasizes, "of all the research approaches used by tourism scholars, archival research is among the most creative and

exotic, since almost everything that remains from the past can be mined as a data source." He also underscores the ongoing challenge of source accessibility and availability.

The following subsections present the methodologies most frequently employed by researchers in historical tourism studies.

3.1 Content Analysis

Content analysis is widely used to record the occurrence and frequency of words, images, names, and events related to a given theme. According to Timothy (2012), tourism research often employs content analysis to study advertising images associated with tourist destinations.

This method has been applied to historical documents (Cardona & Cantalops, 2014), travel narratives (Rogerson & Rogerson, 2021), and representations of regional tourism, such as the construction of the tourist image of Chile's Aconcagua province in *Revista En Viaje* (Aburto, 2017).

Content analysis can be conducted quantitatively, by measuring frequencies and statistical patterns, or qualitatively, by interpreting the meanings embedded in the data (Timothy, 2012). In tourism historiography, this dual use allows both systematic mapping and interpretive depth, making it one of the most versatile and central methodologies in the field.

3.2 Descriptive Historical Narrative

Descriptive historical narrative refers to the construction of explanations about past events through storytelling, grounded in documentary evidence. As Moscateli (2011) notes, historical narratives are "invented by the researcher using the available raw material, which includes not only the information contained in sources—the evidence—but also the interpretive paradigms present in

their culture, whether theoretical-scientific or aesthetic-literary" (p. 7).

Studies that apply this method often focus on political, cultural, or diplomatic dimensions of tourism. For example, Garrido and Villaverde (2017) explore visual culture and the promotion of Spain's tourist image between 1914 and 1984. Moreno Garrido (2017) demonstrates how, in the early 20th century, the Spanish Government sought to attract American elites through luxury tourism projects, and how the postwar period repositioned Spain as a mass tourism destination, particularly for Europe's emerging middle classes.

Similarly, Berg and Edelheim (2012) analyze English and German travel guides about the Cyclades Islands in Greece, showing how these guides constructed stereotypical representations aimed at attracting tourists during the transition from the 20th to the 21st century. These examples reveal how descriptive narratives allow scholars to connect documentary evidence with broader cultural and political contexts.

3.3 Oral History and Interviews

Oral history functions both as a research method and as a source of historical data. As Alberti (1998) explains, oral history privileges interviews with individuals who have participated in or witnessed specific events, contexts, or worldviews, thereby bringing the researcher closer to the object of study. Interviews can subsequently be archived and made available for future investigations (Alberti, 2004).

Oral history can take the form of thematic interviews, focused on specific aspects of the research subject, or life history interviews, which reconstruct the individual's trajectory from childhood to the present. Zorzi and Campodónico (2019), for instance, used oral history to investigate the experiences of long-term residents of Punta del Este, Uruguay, documenting transformations in the city's tourist landscape. Their work identified key periods in local tourism development and highlighted places valued by residents for their social and cultural meanings.

Other examples include Schommer's (2014) study of tourism in Nova Petrópolis, Brazil, which combines oral history with documentary research, and Cheibub's (2014) thematic oral history project on the tourism practices of São Paulo's Social Service for Commerce (Sesc-SP), based on 22 staff interviews. These cases illustrate the richness of oral history in capturing lived experiences and recovering perspectives absent from official archives.

3.4 Participant Observation

Participant observation was employed in only one study, by Angelo (2014), who documented the cultural activities of immigrant communities in Petrópolis, Rio de Janeiro, and how tourism appropriated such practices. The methodology involved field diaries, audio recorders, cameras, and video equipment.

According to Angelo (2014), participant observation, rooted in anthropology, involves the researcher's insertion into and acceptance by the group or context being studied, thereby enabling effective participation in events. This approach provides a more immersive understanding of

tourism practices, particularly where culture and daily life intersect with tourism activities.

3.5 Audiovisual Analysis

Audiovisual analysis was applied by Nieto Ferrando et al. (2015) to examine the production of the Spanish Ministry of Information and Tourism between 1951 and 1977. Their study analyzed 35 films, revealing that the cinematic representation of tourism spaces was closely tied to intangible values. Narration and imagery reinforced each other, showing how "in a large part of the films, the tourist setting and its associated intangible values determined events and characters, their desires, and their motivations" (Ferrando et al., 2015, p. 595).

This method demonstrates how tourism historiography can benefit from cultural and media studies, highlighting the symbolic construction of tourist destinations in audiovisual narratives.

3.6 Comparative Method

The comparative method enables systematic examination of two or more historical phenomena in terms of their similarities and differences, with the intention of achieving broader intellectual insights (Kocka, 2002). As Bloch (1928) argued, comparison allows researchers to analyze social, economic, political, and cultural manifestations across distinct temporal and spatial contexts.

In tourism historiography, Guimarães (2012) notes that the method holds significant potential, as it demands rigorous analysis and can yield discoveries by situating local tourism practices within broader comparative frameworks. This approach has been particularly valuable for cross-cultural studies investigating tourism across different regions or historical periods.

3.7 Iconographic Investigation

Iconographic investigation was employed by Silva and Allis (2021), who analyzed five reports published in the magazine *A Estrada de Rodagem* (1922–1923) using Kossoy's (2009) systematic model. According to this approach, Reference (REF) indicates the main subject or theme; Identity (ID) describes the elements that compose the image, such as location, provenance, and individuals involved; and Iconography (ICON) refers to the investigation of contextual information about the photograph and the photographer.

By applying this method, Silva and Allis (2021) demonstrated how visual sources, often overlooked, can provide unique insights into the symbolic construction of tourism and its social representations. Iconographic investigation thus bridges historiography and visual culture, enriching the methodological repertoire available to tourism researchers.

4 RESULTS ANALYSIS

The findings of this study demonstrate that historiographical production on tourism over the past decade

has favoured particular methodological approaches. The predominance of content analysis reveals a concern with systematizing, classifying, and interpreting documents, discourses, and representations. This methodological preference is directly related to the need to organize a field that, for a long time, remained fragmented and with few consolidated references. Content analysis, whether in its quantitative form (frequencies of terms, categories, and representations) or its qualitative form (interpretation of meanings and discourses), provides tourism researchers with a reliable tool for addressing the heterogeneity of sources.

Alongside this trend, the significant presence of descriptive historical narrative indicates that the writing of tourism history still maintains connections with classical historiographical traditions oriented toward the reconstruction of events. However, alongside this persistence, there is a growing openness to interpretive and interdisciplinary methods, suggesting the field's maturation. Description, in this context, is not merely a record-keeping exercise but also a means of conferring intelligibility on complex phenomena such as tourist practices, human mobility, and the construction of social imaginaries.

The use of oral history and interviews highlights another essential dimension: the recognition of memory and subjective experience as legitimate sources. This approach challenges the hegemony of written and institutional records by enabling access to plural versions of the past. Tourism, as a social practice, is experienced in different ways by visitors, workers, entrepreneurs, and residents; thus, listening to these voices constitutes a fundamental methodological resource for understanding the impacts, transformations, and continuities that shape territories and societies. Moreover, oral history contributes to the creation of archives of testimonies that expand the possibilities of research for future generations.

Less frequent methods—participant observation, audiovisual analysis, iconographic investigation, and the comparative method—demonstrate the potential of innovative approaches, even though they remain underexplored. Participant observation, rooted in anthropology, allows researchers to immerse themselves in fieldwork and directly experience social practices related to tourism. Audiovisual analysis provides insights into how moving images, film narratives, and promotional campaigns have historically constructed tourism imaginaries. Iconographic investigation, in turn, extends analysis to photographs, illustrations, and maps, which are crucial for capturing the symbolic meanings attributed to tourism in different historical contexts. Finally, the comparative method emerges as a promising strategy for identifying similarities and differences across national, regional, and temporal realities, thereby enabling broader dialogue among diverse experiences.

In terms of challenges, the need to strengthen dialogue between history and tourism stands out. Tourism historiography still struggles to gain greater traction in broader historiographical debates and often remains confined to a specialized audience within tourism and leisure studies. Conversely, historical scholarship has not always recognized tourism as a phenomenon worthy of systematic

analysis. This gap underscores the urgency of building conceptual and methodological bridges. Interdisciplinarity is indispensable: understanding tourism requires engagement with sociology, anthropology, geography, economics, and cultural studies.

Another challenge lies in the organization and preservation of archives. Many tourism-related sources—newspapers, magazines, photographs, travel guides, films, and advertising materials—remain scattered, with limited access or at risk of deterioration. The creation of databases and digital collections represents a crucial perspective for the future, not only for preservation but also for democratizing access to sources. Digital technologies such as big data analysis, artificial intelligence, and georeferencing systems offer new possibilities for revisiting tourism's past using innovative analytical tools.

Ultimately, the findings point to a field in expansion and in search of legitimacy. By revealing the methodological approaches employed, this research demonstrates that the history of tourism is not merely a secondary thematic niche but rather a domain capable of making original contributions to understanding contemporary societies and their historical processes. Tourism, after all, functions as a mirror of social, cultural, political, and economic transformations and must therefore be critically analyzed through diverse and rigorous methodological lenses.

5 FINAL CONSIDERATIONS

The primary objective of this article was to present and discuss the methodological approaches most frequently employed in historical research on tourism over the past ten years. The analysis revealed that the most recurrent methodologies include content analysis, descriptive historical narrative, and oral history/interviews. In contrast, participant observation, audiovisual analysis, the comparative method, and iconographic investigation appeared less frequently.

The results indicate that the field of tourism history, though still in the process of consolidation, is characterized by an increasingly diverse methodological repertoire. This plurality reflects the necessity of dealing with heterogeneous sources—such as brochures, travel diaries, newspapers, photographs, guidebooks, films, interviews, and institutional records—each of which requires distinct interpretive tools.

The findings also highlight that a productive tension between tradition and innovation marks the historiography of tourism. On the one hand, descriptive narratives and classical historiographical practices remain fundamental for reconstructing events and contexts. On the other hand, interpretive and interdisciplinary approaches are gaining ground, signalling the field's maturation. Description, in this sense, is not limited to registering events but serves as an intellectual device for rendering complex social phenomena—such as tourist practices, human mobility, and the construction of social imaginaries—comprehensible.

The inclusion of oral history and interviews underscores the value of memory and subjective experience, broadening the spectrum of voices considered in research. These approaches move beyond the dominance of written or institutional sources and reveal plural interpretations of the past. Similarly, less-frequent methodologies such as

audiovisual analysis, participant observation, comparative methods, and iconographic investigation reveal the potential of innovative perspectives to illuminate the symbolic, cultural, and social dimensions of tourism history.

Importantly, the research demonstrates that no single methodology can fully capture the complexity of tourism as a historical and social phenomenon. Rather, it is the complementarity and articulation of different methods that enable more comprehensive and critical interpretations. Historical research on tourism therefore requires an interdisciplinary orientation, open to dialogue with sociology, geography, anthropology, cultural studies, and other fields of knowledge.

Looking ahead, future perspectives include expanding comparative studies across diverse geographical and temporal contexts, systematizing and preserving primary source collections related to tourism, and incorporating digital technologies into historical research. Tools such as big data analysis, artificial intelligence, and geospatial technologies offer promising possibilities for reinterpreting tourism's past with renewed methodological rigour.

Ultimately, the study reinforces the view that the history of tourism is not a secondary thematic niche, but a legitimate and necessary field of inquiry. Archives, as repositories of collective memory, serve as gateways to multiple interpretations of the past and reveal new facets of tourist territories and social actors. Tourism, as both a mirror and an agent of social, cultural, political, and economic transformations, must be examined critically and rigorously through diverse methodological lenses.

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CRedit author statement

Term	Definition	Author 1	A2
Conceptualization	Ideas; formulation or evolution of overarching research goals and aims	x	x
Methodology	Development or design of methodology; creation of models	x	x
Software	Programming, software development; designing computer programs; implementation of the computer code and supporting algorithms; testing of existing code components	x	x
Validation	Verification, whether as a part of the activity or separate, of the overall replication/ reproducibility of results/experiments and other research outputs	x	x
Formal analysis	Application of statistical, mathematical, computational, or other formal techniques to analyze or synthesize study data	x	x
Investigation	Conducting a research and investigation process, specifically performing the experiments, or data/evidence collection	x	
Resources	Provision of study materials, reagents, materials, patients, laboratory samples, animals, instrumentation, computing resources, or other analysis tools	x	x
Data Curation	Management activities to annotate (produce metadata), scrub data and maintain research data (including software code, where it is necessary for interpreting the data itself) for initial use and later reuse	x	x
Writing - Original Draft	Preparation, creation and/or presentation of the published work, specifically writing the initial draft (including substantive translation)	x	x
Writing - Review & Editing	Preparation, creation and/or presentation of the published work by those from the original research group, specifically critical review, commentary or revision – including pre-or post-publication stages	x	x
Visualization	Preparation, creation and/or presentation of the published work, specifically visualization/ data presentation	x	x
Supervision	Oversight and leadership responsibility for the research activity planning and execution, including mentorship external to the core team	x	x
Project administration	Management and coordination responsibility for the research activity planning and execution	x	x
Funding acquisition	Acquisition of the financial support for the project leading to this publication	x	

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