PACKAGING DREAMS:

AN ANTHROPOLOGICAL ANALYSIS

OF TOUR OPERATORS

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By

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A Thesis
Submitted to the School of Graduate Studies
in Partial Fulfilment of the Requirements
for the Degree
Master of Arts

McMaster University

April, 1989

MASTER OF ARTS (1989)
(Anthropology)

McMASTER UNIVERSITY
Hamilton, Ontario

TITLE: Packaging Dreams: An Anthropological Analysis of Tour Operators

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SUPERVISOR: Professor Matthew Cooper

NUMBER OF PAGES: vii, 137

ABSTRACT

This thesis addresses the general question of how tourism is generated. More specifically it is a qualitative analysis of how the tour packaging industry interacts with the travel market in Canada. The industry provides the means of tourism, linking tourists with destinations, the subject and object of tourism respectively.

Three dimensions of the tourism system are considered: process, culture, and history. These perspectives allow for a more holistic understanding of the operations, relationships, and effects of tourism.

Research into the factors involved in generating a tourist flow contributes an insight into Canadian social/cultural reality and change. For the destination areas, it may be impossible to understand completely the host-guest interactions without reference to the generating situation.

The results of the analysis show package tour operators to occupy an important brokerage position in the tourism process. As well, tourism is determined to possess significance as a culturally constituted good which the tour operator is able to package into vacation 'dreams.'

ACKNOWLEDGEMENTS

I wish to thank my supervisory committee for their guidance and support throughout the research and writing of this thesis. The expert advice given by Professors Matthew Cooper and David Counts was of vital importance to this study. I extend grateful acknowledgements to Peter Williams, Ph.D., who contributed his expertise in the field of tourism.

I greatly appreciate the enthusiastic and helpful response given me by the Canadian tour operators who made possible the interview material upon which this thesis is based. I also wish to express thanks to my friends and colleagues at the McMaster Anthropology Department for their encouragement during the writing period.

I claim responsibility for all textual errors and views expressed herein.

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CHAPTER 1

INTRODUCTION

This thesis investigates how culturally derived images of travel motivate people to holiday and how the tour packaging industry markets these images. The purpose is to analyze qualitatively the brokerage position occupied by Canadian package tour operators in the tourism process and to determine the significance of the product they sell. It is because tourism is a culturally constituted good, that tour operators can package vacation 'dreams' in uniquely Canadian wrappings.

My research project studies an industry: that of Canadian tour wholesalers and packagers. This stands in distinction to social scientific tourism studies which centre on patterns of tourist behaviour and motivation or focus on destination impacts (eg. Smith 1978, MacCannell 1979, cf. Nash 1981, Dann et.al. 1988). As opposed to investigations of tourism from a work - habitat - leisure-travel perspective (eg. Krippendorf 1986), I seek to place an aspect of the industry within the general context of tourism as a global activity. This activity involves generating regions, destination regions, and linkage organizations.

Anthropological literature dealing with tourism has shown comparatively little interest in exploring the tourism process in the tourist-generating society (Nash 1981, Dann, et.al. 1988). The tour operator industry, as an important element of international tourism, has likewise received little study (Sheldon 1986). I aim to help fill that gap by confronting the linkage aspect of tourism by that component of the industry that 'packages dreams' for their home society.

The study is divided into seven chapters and a conclusion. Chapter Two recounts the history and growth of international tourism, tracing the development of the travel industry with special attention given to tour operators. Concluded by a more current account of Canadian international tourism, this chapter provides a background and temporal dimension to the discussions that follow.

Chapter Three outlines the entrepreneurial nature- the structure and function - of the tour operator industry as it is today. Insights into the importance of tour operators as brokers in the tourism process are given in Chapters Four and Five. Chapter Four argues that holiday packaging companies are important intermediaries and innovators. They create, package and market a product specifically designed for their home region, thereby generating mass-tourist flows directed towards host regions.

The role a tour packager plays as intermediary extends to questions of his control over the amount or quality of communication between host and tourist groups. Chapter Five shows tour operators to be skillful communicators, marketing selected images from a set of Canadian cultural, social, political, and economic assumptions.

Together Chapters Three to Five address the means of tourism. Following in the Sixth chapter is an analysis of the demand[1] for tourism by the Canadian travel market. Here tourism is treated as a culturally constituted good.

Chapter Seven discusses the polarization of mainstream tour operators who chiefly mass-market winter tours to the south, from those smaller operators who sell more specialized and exclusive types of adventure and culture tours. My research points to evidence of a growing demand among experienced Canadian travellers for tours that are more sophisticated than beach-holidays. The interactive relationship between marketer and consumer has resulted in a transformation of both.

1.1 Theoretical Approach: A Three Dimensional Perspective

In this thesis I define tourism, or more precisely its operations, as a process. Tourism is the integration of tourist, the tourist industry and the attractions, an activity which flows in a direction from origin to

destination. This series of sequential actions effects change in its environments. The influence tourism has on its playing members and its surroundings is an important feature of my analysis. The processual model incorporates the catalytic nature of tourism by describing it as an activity rather than as an industry.

The definition of tourism as a process allows me to consider the relationships between origin, linkage, and destination in terms of the subject, means, and object of tourism (See Figure 1.1). The tourist industry - airlines,

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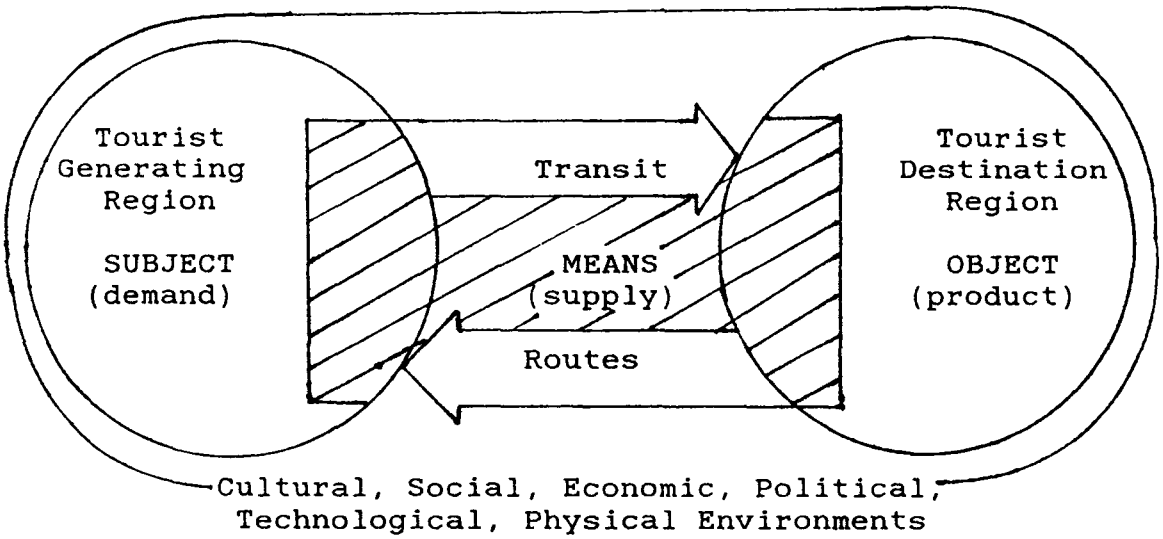
FIGURE 1.1 Tourism: System and Process



The Tourist Industry: Represented in all three geographical elements of the process

Source: Adapted from Leiper 1979:404

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hoteliers, tour operators, travel agents, etc. - forms one of the more obvious links between the home and host regions. The industry provides the means of tourism. It is a chain stretching from the tourist generating regions, across transit routes, to the destination region. The links are diverse, the product an amalgam of many components.

The tourist industry is the sum of many small and large firms that produce and sell commodities for the traveller. These firms sell services intended to fulfil the expectations - the dreams - of the tourism consumer. An important and unique segment of this service industry is made up of tour wholesalers and operators who package the various tourism products into a single entity. By so doing, they play an important intermediary role between the generating region and the destination region. I view package tour operators as 'brokers' who stand between the 'push' and 'pull' factors in the tourism process and who interpret and manipulate these factors to a commercial end.

Brokerage within the tourism process occurs as part of a larger open system that interacts with its broader cultural, social, economic, political, technological and physical environments. The systems approach to tourism uses a spatial origin-linkage-destination model which identifies each of tourism's basic facets as interrelated (Leiper 1979; Mill & Morrison 1985; Gunn 1988). This model emphasizes

tourism as an activity whose playing field extends across international borders and whose players include tourists, marketers, and hosts. As such, this theory provides a basis for understanding tourism on a broad scale.

In this thesis I choose to emphasize the cultural environment of the tourism system. Tourism is more than an industry. It is a response to a social need: to the adoption of travel as part of a lifestyle. From a consumer viewpoint, I interpret travel as a culturally constituted consumer good.[2] The cultural significance of tourism goes beyond its utilitarian function; it has a symbolic quality that is a powerful marketing tool. Travel marketers design and modify their product according to the dreams they perceive consumers to possess and at the same time, actively create new definitions of those dreams.

The cultural perspective highlights the interactive relationship between the potential tourist and the tour operator who markets vacation images selected from an array of cultural concepts and attitudes of travel. I interpret changing marketing strategies as the tour operator's response to overall trends in tourist demand. Thus, I overcome, in part, the problems and complexity of dealing with individual motivation. While the weight of this thesis is given to the means of tourism, demand is also considered; consumer and marketer interact in a dynamic relationship.

Tourism from the generating region evolves in response to those features ('push' factors) which cause or stimulate the temporary outflow of residents. To account for these features, I take an historical look at the growth of Canadian tour operators and international travel. This contextual backdrop ties tourism as a process together with tourism as a culturally constituted good as integral components of the same system. The tourism process is set in a context involving not only a host situation where tourists and their hosts come together, but also a home situation from where visitors are generated and drawn to particular destinations.

In sum, I represent package tour operators on a tourism plane having three dimensions. As a process, tourism has a spatial dimension in which operators are effective brokers by virtue of their intermediary position within that process. The view of travel as a culturally constituted consumer good adds a dimension of cultural depth. It allows one to more clearly see how and why operators are effective packagers of dreams. The historical perspective adds a dimension of time that serves to contextualize changes and trends as regard the tour operator position and their product. I believe that this three-dimensional picture of the tourism system presents a more holistic understanding of its operations, its effects, and the people involved.

Canada is among those generating countries where the business of tourism has become an elaborate domestic and international process of growth and change. As the generating region under consideration, Canada is the basic market for the tourist industry, the source of potential tourism demand. The Canadian economic, social, and cultural environments are therefore significant factors in directing the changes observed in the tourist industry and the tourist market. The international flow of pleasure tourists has grown most dramatically since World War II; hence, this analysis concentrates on trends and shifts from that time to the present.

1.2 The Study

My research set two initial objectives: 1) to evaluate the position of package tour operators as intermediaries in the tourism process, and; 2) to explore their role as 'packagers of dreams.' The study employs both quantitative and qualitative data. The primary base of information is drawn from personal interviews I conducted with local tour operators and wholesalers headquartered in Toronto, Canada. This is supplemented and supported by a secondary data base including consumer and tourism studies, the travel press, and government documents and statistics.

While a wide range of quantitative data is available on tourism in and out of Canada, it is almost impossible to locate significant economic and financial information that deals specifically with tour operators. Canadian statistics on the Tourism Sector and the tourism labour force primarily focus on the supply of tourism services within our borders (Statistics Canada 1988). Equivalent figures of Canadian industries catering to outbound tourism are not available.3

The Canadian Association of Tour Operators (CATO) is likewise unable to supply statistical information.[4] A recently established organization, CATO has yet to set up a resource library , but a representative confirmed the actual lack and need of quantitative data about Canadian tour operators. Extrapolations from charter flight statistics provide the best means of assessing the volume of package sales from Canada. However, these are merely a rough frame of reference, to be supported and filled in by the impressions offered by the tour operators themselves.

I conducted informal interviews with sales and marketing directors, product and operations managers, vice-presidents and presidents of Toronto-based tour package operations. The interviews maintained a free form of conversation which I guided by the aid of an outline of various topical aspects about the industry and outbound tourism from Canada. Questions pertained to the general

nature of tour operation, the problems of marketing, the character of the Canadian travel market, the kind of vacation image operators try to present to the market, and the operators' impressions of their significance in the industry. I used a tape-recorder as back-up for the permanent collection of written notes used in later analyses.

To manageably operationalize a project of this nature I employed a 'purposive' sampling technique. This means that the operators chosen for interview were those I believed could provide me with the necessary type of information. The constraints inherent in Masters level research - involving time, travel and funding - mean that I was able to sample only a small proportion (approximately 5%) of the total number of Canadian tour operators. The sample is also one of convenience - a population within my easy reach by car and telephone.

The strength of the sample as a representative one is supported by several factors. First, most tour operations have their headquarters in the Toronto vicinity; thus, I had access to key individuals in the Canadian tour operator industry. Second, Toronto continues to be the main departure point for charter flights (Statistics Canada 1980) and the province of Ontario commands the greatest share (53%) of residents returning from overseas countries (Statistics

Canada 1988b). Third, responses among the operators interviewed were both consistent and correlative.

Nevertheless, the limited size of the sample precludes it as the sole basis for estimating how closely its characteristics approximate the overall tour operation industry. Secondary data sources serve to intersect fact and impression. Claims derived from the interview data that are impressionistic, conjectural, or implied are stated as such.

I chose twenty operators, ten of whom represent the mainstream mass-tour business and another ten who represent more specialized interests, market segments, and destinations.[5] These latter firms are generally quite small in comparison to the employee, sales and revenue volume of the larger mainstream operators. The division between specialized and mainstream operators in the sample is deliberate: it aims to illustrate certain trends and new directions evident in the industry and the travel market. By virtue of having been in business for a decade or longer, the selection of large, stable tour operators aims at somewhat of an historical overview of trends and changes in the mass-market.

To maintain the sense that Canadian tour packagers are actors in a global process, interviews and analyses focus on international, as opposed to domestic tourist flows. This international bias maintains the importance of

tourism as a phenomenon of culture contact and as an economic development issue involving foreign interests. This focus is also significant when one considers that Canadian motivations for dream vacationing often involve a 'flavour for foreignness,' or an 'escape to tropical paradise.'

NOTES TO CHAPTER 1

1 In this thesis the term 'demand' indicates 'the desire to purchase or possess' and is not used strictly in the economic technical sense.

2 This perspective follows the lead taken by Grant McCracken in his recent work, Culture and Consumption (1988).

3 Statistical studies on wholesalers and packagers do exist in Britain (International Tourism Quarterly 1971) and the U.S.A. (Touche Ross 1975 in Sheldon 1986) but they can give only a rough idea of the general importance of tour operations in an overall international context. The Canadian Association of Tour Operators (CATO) advises against comparisons to the U.S.A where tour operations play a substantial less significant part in the travel industry. If anything, Canadian tour operators are more comparable to the British situation, in whose tradition Canada originated and grew.

4 The thirteen members of CATO as of January 1, 1989 are listed below. The asterisks indicate those firms included in my interview sample.

Adventure Tours*
Air Canada-Touram*
Alba Tours International Inc*
Carousal Tours
Conquest Tours*
Fiesta/Wayfarer*
Holiday House
Paramount Holidays
Regent Holidays Ltd*
Sunquest Vacations Ltd*
Thompson Vacations
Treasure Tours*
Wardair Holidays*

5 Nine of the twenty firms in the interview sample are indicated in Note Four. The remaining eleven are listed below:

Blyth & Company
Butterfield & Robinson (Est.1964)
Canadian Friendship Tours
Club Med Sales Inc.
Contiki Holiday (Canada) Ltd.
East African Travel Consultants Inc.
Horizon Holidays Ltd.
Leung Brothers Travel Ltd.
Newmans South Pacific Tours Ltd.
Wings of the World Inc., Travel
Worldwide Adventures

CHAPTER 2

INTERNATIONAL TOURISM: AN HISTORICAL OVERVIEW

International travel is a phenomenon that has taken place, in some form or another, throughout recorded history. What is unique about international tourism today is its scale and scope; it is now a major activity worldwide. The growth of international travel and of the tourist industry in Canada is a part of this larger global picture.

This chapter sketches the historical development of leisure travel that began in 18th century Europe and its subsequent spread to North America. It then describes the initiation and growth of wholesalers and tour operators in association with the development of a vibrant travel industry in Canada post-World War II, the period of global growth of international travel. The chapter concludes by outlining the present scope of foreign travel by Canadians.

This historical overview sets the stage for the emerging role of package tour operators as intermediaries. It puts into perspective where their brokerage position in the tourism process originated and how it developed into what we see today.

2.1 Changing Concepts of Travel

During the 18th century, private travel was subsumed under the concept of the 'Grand Tour.'[1] Foreign travel was part of an aristocratic man's education. As a pleasurable activity travel became an aspect of the fashionable era of spas and seaside resorts (Burkart & Medlik 1974:4). Leisure during the 18th century was an attribute of social class rather than a division of one's lifestyle. Individuals belonged to a stratum of society of either labour or liberty. The division of life into work and leisure in the modern sense began only with the separation of home and workplace during the Industrial Revolution in 19th century (Ibid.).

During the Industrial Revolution increases in absolute population size were accompanied by a steady drift of population from the rural areas to the newly emerging industrial towns. Urbanization created a market for travel by generating a literate and relatively wealthy middle-class. The development of travel at a speed and with a comfort never before known encouraged a new capacity and desire among Europeans to travel.

A revolution in consumerism also accompanied the revolution in industrialization. This consumer revolution represented a change not just in buying habits, but a fundamental shift in the culture of the early modern world

(McCracken 1988). Most important to the present context is that the consumption of goods became a mass activity and a permanent social fact. Increasing prosperity in real terms brought sufficient income to match leisure. Commuting to work by rail underlined the distinction between work and leisure on a daily basis, which inevitably extended to the working year. The concept of an annual holiday began to be formulated as a condition of work (Burkart & Medlik 1974).

The development of tourism as we know it in the modern world was directly affected by the importance of the motorcar confirmed during the First World War. World War II confirmed the position of aircraft for civil use. The automobile changed domestic tourism in a profound way, but it was the airplane that profoundly changed international travel. However, between the two great wars, the Great Depression of 1929-31 nearly devastated the elite luxury tourism that had developed in several south European destinations. Thus, prices fell in order to meet the demands of lower class tourists an new markets opened up for mass tourism. By the end of the 1930's, the scope of international tourism became generalized toward industrialized populations who now found travel within their reach. The concept of a paid holiday played a major role in extending tourism to the working people.

Increased wealth and prosperity in the developed countries in the years following the Second World War generated a society with increasing capacity to consume. With this came an increased desire to travel and tourism changed from being a preserve of the wealthy and the leisure-class to becoming a mass phenomenon (Ibid. 1974).

2.2 The History of Package Tour Operators

As travel became a widespread activity the need arose for a specialist travel organizer who could assemble more complex journeys on the traveller's behalf. The travel organizer issued tickets to cover the whole journey as an agent for the transport companies and made hotel arrangements for the traveller's stay (Burkart & Medlik 1974). The travel organizer was increasingly looked upon to compile entire excursions, opening up opportunities to tap other than retail markets. Thus the tour operator came onto the scene: he bought unsold regular-fare seats at low excursion rates in bulk quantities and offered them to the public at prices lower than obtainable from transport companies.

Thomas Cook is credited with being the first such tour operator (Burkart & Medlik 1974, Turner & Ash 1975, Hyndman & Badger 1982). As early as 1845 his services for excursions and bulk travel of the kind were sought by

British travellers interested in touring the European continent. In 1866 Cook's first transatlantic American tour was made. By the end of the century Thomas Cook offices had been opened in most parts of the world. The significance of Cook's life work lies in his creation of the excursion as a single transaction or package. His concept complemented the growth of British railways and passenger shipping, and brought organized travel to an increasingly large sector of the public. Thomas Cook saw 'excursionism' as an agent of 'democratization,' an outlook shared by many operators today. Cook's philosophy of "the greatest benefit for the greatest number at the lowest cost," initiated the pluralization process we now call mass tourism. In contrast to Cook's excursions which took workers to foreign union and protest rallies, tours packaged today take working class people to resorts formerly exclusive to the elite.

The subsequent development in the 1950's and 1960's of package holidays or the inclusive tour charter (ITC) has been substantially a British contribution. An overabundance of pilots and aircraft following World War II and mass movements of people to North America gave impetus to charter flights. The budget-package idea caught on and by the 1970's midland factory workers and London clerks were buying ITC's from a dozen or so large British operators, and flying

beyond the beaches of Brighton on low cost vacations to southern European seashores (Hyndman & Badger 1982:10.4).

The concept of charter tours quickly spread to France, Germany, Holland, Scandinavia, and North America. Originally, reduced prices obtained by contract bulk purchase of hotel accommodation and transportation implied typically chartering whole aircraft. This made cheap travel only available to clubs, societies, professional associations, and the like who could guarantee a full chartered craft. In order to control the amount of business diverted from scheduled carriers, fairly strict rules were devised about the nature of the clubs eligible to charter (known as affinity group charters).

Canadian tour operators tell a story similar to the British experience, albeit set in a later time period. Due to the large number of British immigrants, Canada was the second country to jump onto the bandwagon and develop the charter business. Like the British traveller, a Canadian had to be a card-carrying member of some group or club (a union, for example) to book a charter flight. It was not long before individual entrepreneurs were running phony 'charter clubs' and issuing back-dated membership cards in order to generate charter flight access for the average traveller. Operators recognized an opportunity to sell travel to a mass market at a cheap price if only the 'club' specifications

could be met. The Canadian government finally legalized charters and the first ITC holidays were introduced in 1967. These soon became the "hottest item in the travel business" (Financial Post, Sept.1, 1973:11). ITC package sales rose from 644 in 1970, to 5,800 in 1972, to 325,000 in the 1974 season! The 'charter clubs' were quickly converted into package tour operations and grew into the industry we see today.

The first tour operators in Canada were J. Calladine and D. Gill, who combined talents during the mid 1960's to form Suntours Limited, later named Sunflight Holidays (Hyndman & Badger 1982). Other companies followed in the early 1970's. In a few short years the concept of packaged charter tours changed the entire vacation world in Canada to the point where ITC sales are now a daily part of retail travel (Ibid.).

As more countries have entered the travel trade in the past three decades, the growth and specialization of tourist services has become increasingly noticeable.[2] In Canada tour operators have expanded to become the most vigorous sector of the holiday market (See Table 2.A). Some operators now own their own airlines, club resorts, and hotels. Competitive private and national airlines have also entered into the field of tour operation and into formal associations with the accommodation industry. Almost all

TABLE 2.A Travel Services, Total Revenues by Industry 1983-1985

Industry	Revenues ($'000,000)		
	1983	**1984**	**1985**
Travel Services	2173.3	2795.3	3188.4
Ticket & Travel Agents	899.4	1221.9	1443.2
Tour Wholesalers and Operators	1273.8	1573.4	1745.3

Source: Statistics Canada 1988b

Canadian domestic and international airlines have established special departments to develop tours to their primary destinations.[3] This is often in addition to a close working relationship with outside tour operators who market and develop tours for them. A vertical integration of the industry is evident resulting in not only greater control over home market forces, but also of stronger bargaining positions with destination countries.

2.3 International Travel in Canada Today

The growth of travel services in Canada is inextricably connected to the growth of travel by Canadian residents to foreign destinations. In terms of international travellers per capita, Canada has become one of the leading tourist generating nations (Bailie 1977; 1988). While travel to the USA remains the most important destination for

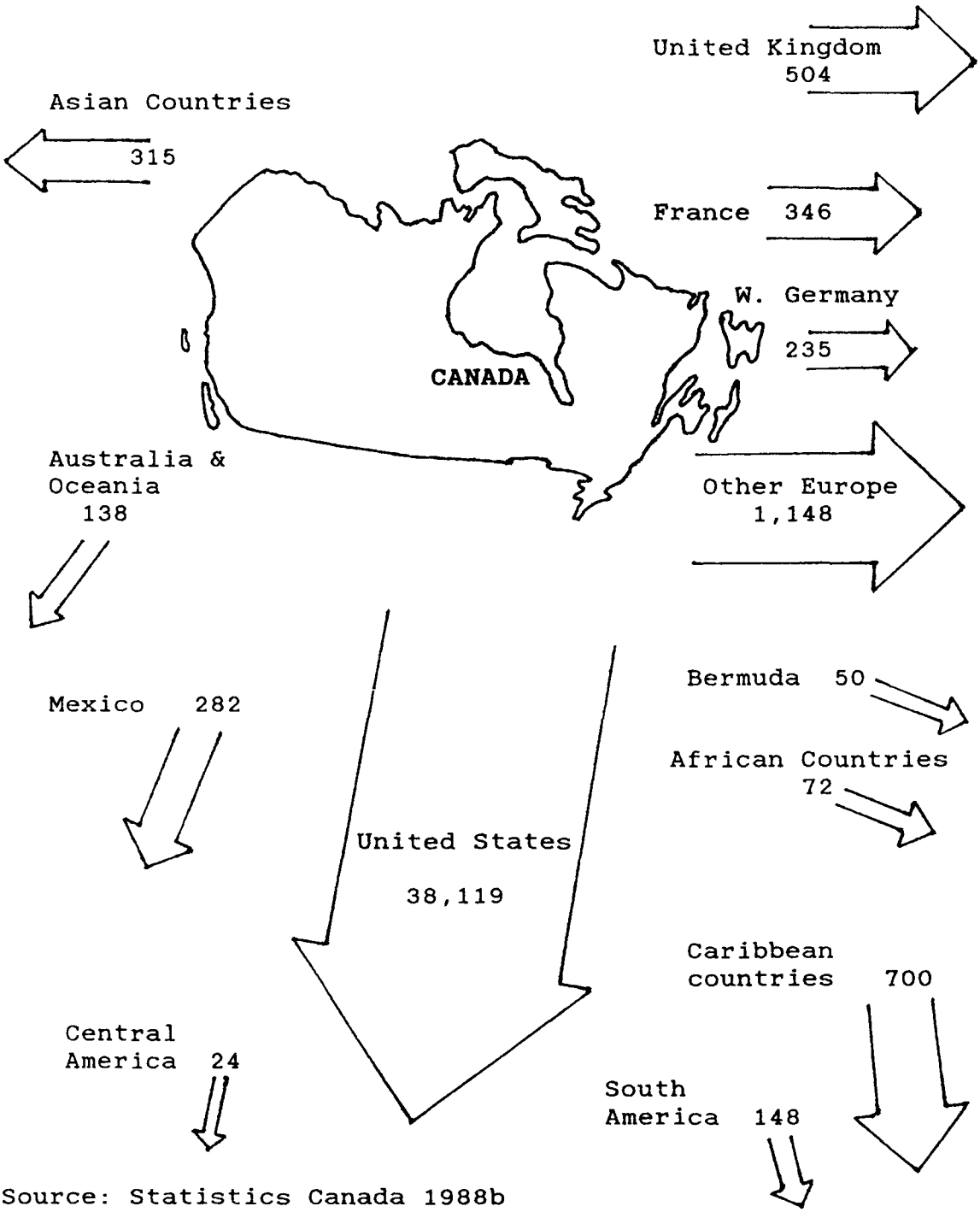
Canadian travellers today, the number of Canadians returning from other countries increased at a
steady and rapid rate (Ibid.). (See Figure 2.1)

Canadian travel to Europe has declined since 1960 relative to a large increase in travel to Asian, Caribbean, and South American countries. This increase of flow to sun-spot destinations indicates that more Canadians are travelling exclusively for pleasure (54% in 1987) rather than visiting friends and relatives (25%). Travel for business, convention, and employment reasons has remained relatively unchanged at 12%, although it has been significant in the flow of Canadians to South America (Statistics Canada 1988a).

The significant feature of travel by Canadians during the 1980's is the steady and dramatic growth of Canadian outbound travel in spite of a severe economic recession and high unemployment. However, these economic conditions have retarded the rapid growth rate that was apparent from 1960 to 1975 and altered the direction of travel (Taylor 1987).

The major change over the last ten years is a 5% loss of the Canadian market share by the USA, which nevertheless continues to be the foremost destination for the Canadian traveller. Travel growth to countries overseas is spurred by deregulation of the Canadian airline industry plus more

FIGURE 2.1 International Visits by Canadians 1986 (thousands of visits)



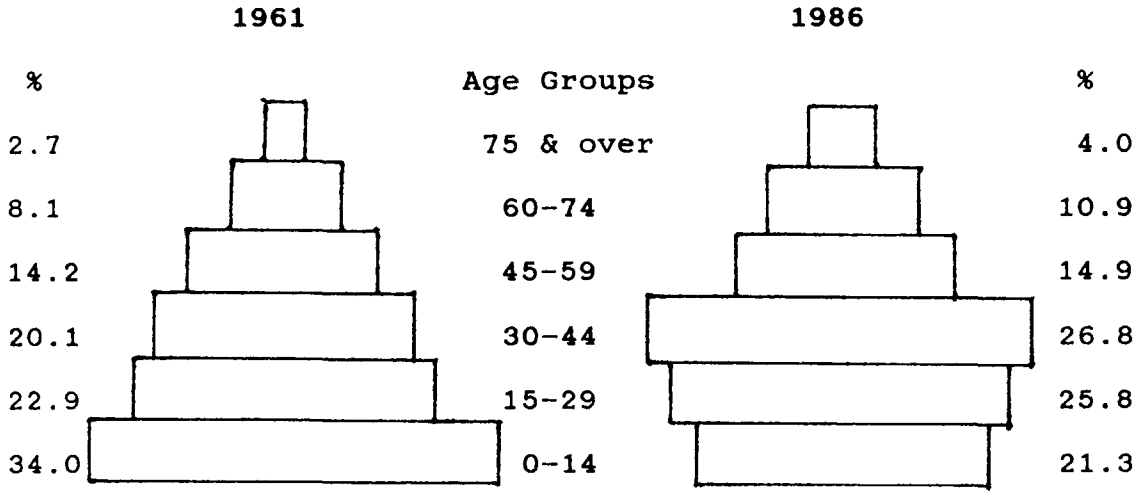
Source: Statistics Canada 1988b

direct links between Canada and Latin American countries, Europe, and Australia and New Zealand (Statistics Canada 1988a). Taylor concludes that: "The Canadian market bears all the signs of being a mature market and few dramatic changes are likely to affect it in the future. Nevertheless, within the total, volume changes are taking place that will determine how and why this mature market will travel in the future" (1987:50).

A wide range of economic and social determinants bear upon the changing volume and character of international travel. Of these, the most significant to the Canadian market are demographic change, immigration, and rising standards of living.

Demographic change evident from Census of Canada results indicate a decline in the rate of population growth in each successive period since 1961 (Statistics Canada 1981). Its present rate of approximately 1%/year is projected to decline to only 0.5%/year by the beginning of the next century.[4] Age distribution figures over the last thirty years show disproportionately large increases in the size of the population between 15 and 35 and over 50 years of age (See Figure 2.2). Absolute declines in the numbers of younger children since 1960, contrasting with a near doubling of young adults in theirtwenties and thirties during the same period has a dramatic effect on the

FIGURE 2.2 Age Pyramids of the Population of Canada 1961 & 1986



Source: Statistics Canada 1988b

nature of the travel market (Statistics Canada 1981). As the number of adults in Canada increases, so do the number of income earners and thus potential tourists.

This is especially true for the over-fifty age bracket who now control more than 50% of Canada's discretionary income and 80% of the country's total personal wealth (Chisolm 1989). A Toronto based market research consultant predicts that following the year 2000, when the bulge of baby-boomers now in their mid-to-late thirties become seniors, the 50-plus market, including the travel sector, "will explode" (Ibid.:24).

Traditionally Canadian tourists spend more time and therefore more money in other countries than do their

international counterparts in Canada. Canada's chronic travel deficit is fed by factors such as devalued foreign currencies, more direct scheduled flights to sun destinations and new charter class fares on major Canadian airlines. The deficit is further exacerbated by the values offered by wholesaler's tour packages which in many cases hold the same price line as the previous winter's level (Financial Post, Oct.23, 1976:1,4).

Approximately two thirds of the annual travel deficit is caused by international travel trends in Canada during the winter months (Statistics Canada 1986). The annual migration of thousands of Canadians to sun destinations is a deeply entrenched phenomenon of Canadian outbound travel. Half of the person trips taken by Canadians in the USA are spent in the sun states, which for many Canadians are, in fact, a second home. For example, no other state comes close to matching the appeal that Florida has to 'sun-thirsty' Canadians (Statistics Canada 1988a). Including other popular winter targets such as Mexico, Bermuda, and the Caribbean, sun destinations account for about 40% of Canadian person nights outside the country (Taylor 1987:51). There is no doubt that a prime motivation for Canadian outbound travel is the search for sun, sea and sand.

One tour operator interviewed believes that over the last 20 years or so the Canadian travel market has grown up

around two essential facts: while the first is predictably the long, harsh winters that compel people to retreat south, the second factor, is the influx of immigrants that has created a VFR (Visiting Friends and Family) market. The fifty years following the First World War were marked by substantial migration of European emigrants to North America. As the Western countries regained and continued their prosperity after the Second World War, they attracted further immigrants from relatively undeveloped countries.

International migration continues to be a significant demographic factor in Canadian travel marketing. A growing diversity of foreign-born population opens new markets for travel both to and from Canada. The percentage of the foreign-born population in Canada, born neither in Europe nor in the USA, rose from 4% in 1961 to 30% in 1986 (Statistics Canada 1988b:205). The Toronto-based tour operators interviewed correlate the high level of multiculturalism in their city to a revolutionized VFR market. First generation ethnic Canadians wish to go home and second, third and subsequent generations wish to go back to 'find their roots' or as pleasure tourists. As family ties weaken, VFR traffic will fall proportionately and pleasure travel will increase.

The demand for travel and recreation are greatly influenced also by income levels and amount of leisure time,

both of which have been subject to change in the past few decades. The Canadian working class has, over the years, received increasingly longer vacation time. A Labour Canada survey indicates a gradual increase in the amount of leisure time for employed persons over the last twenty years: three quarters of employees received 11 paid holidays or MORE in 1981, whereas in 1971 most employees received 10 days or LESS (Statistics Canada 1980). The five day work week continues to predominate, and paid vacations are typically of three weeks duration with more time available for those employees with seniority.

In terms of real income Canadians have grown increasingly better off (See Table 2.B). Canadians have become capable of spending more on travel since the first part of the 70's (Statistics Canada 1980). Since 1984, the Canadian economy has been growing faster than that of other western industrialized countries. This has spurred consumer spending and, combined with a stronger Canadian dollar, accounts in part for increasing flows of Canadian travellers (Statistics Canada 1988a:xix). It is significant to note that vacation travel did not abate during the recessions of the early 1970's and 1980's. This indicates that Canadians may view travel as a basic need, undaunted by the psychological and economic realities of bad times (Tourism Canada 1985). Wholesalers take the present states of

TABLE 2.B Personal Disposable Income* per Capita Canada 1941-1986 (dollars; 1981 = 1.00)

1941	1946	1951	1956	1961	
1,879	3,621	3,799	4,354	4,481	
	1966	**1971**	**1976**	**1981**	**1986**
	5,492	6,314	8,554	9,764	10,209

*Personal Disposable Income: the amount left over from personal income after payment of direct taxes and other fees, licenses, permits to governments. This amount is available to be spent on consumer goods and services, transferred to other sectors, or saved. Shown in constant dollars these figures represent relative buying power in 5-year time increments.

Source: Statistics Canada 1988c

Canadian economy into consideration and deliberately include in their assortment some packages which people on controlled incomes can afford.

Additional factors in the demand for travel are international price changes and foreign exchange rates. Recent shifts in traveller preference from the traditional European destinations to regions south of Canada are influenced by exchange rate fluctuations. The currencies of European countries with which there are major travel movements to and from Canada increased their values in relation to the Canadian dollar in the 70's. As well, the relative cost of travel for Canadians in the United States

and in other countries increased in the decade and a half between 1970 and 1985. However, between 1981 and 1985 when the Canadian dollar strengthened advantageously against most overseas currencies, spending by Canadian travellers overseas grew significantly. As the dollar began to fall again in 1987, the growth of Canadian expenditures in many European countries also began to slow down (Statistics Canada 1988a).

Latin America has risen to the position of Canada's new holiday 'hotspot,' especially during the first travel quarter from January to March. The rapid devaluation of the peso and direct air traffic between Montreal or Toronto and the resort of Cancun facilitates more Canadian travel to Mexico. Inexpensive destinations such as Venezuela and Columbia have increased their shares of Canadian travellers. Canadian travel to tropical island paradises in the Caribbean (e.g., Dominican Republic, Cuba, Trinidad & Tobago) are also influenced by exchange rates (Ibid.). In contrast, the long standing favourite Canadian sun destinations of Bermuda, Bahamas, and Puerto Rico, which are now more expensive, have suffered setbacks.

Two things are worthy of note with regard to exchange rates and the relative increase in travel costs outside Canada. The first is that despite rising costs, the international flow of Canadian travellers has been on the

increase over the years. In economic terms this indicates a drop in income elasticity of demand for overseas travel. In spite of an overall rise in disposable incomes, it would nevertheless be understandable if Canadian travellers decided to spend a larger proportion of their income on domestic travel and recreation. The fact that they do not may be one indicator that Canadians now view vacations as a necessity rather than a luxury.

The second noteworthy item is the seeming magical appearance on the market of a new, less expensive, 'rough and ready' destination when one previously popular becomes too expensive for most Canadian tastes. This points to the active engagement of those in the tourist industry - both in the generating and the host regions - towards stimulating tourist flows. Tour operators play a particularly active role by seeking out inexpensive, but dollar-value contracts where they can be found. They introduce and promote new 'budget' destinations to the Canadian travel market.

Taking these two factors into account - travel as a necessity plus greater selection of budget to luxury priced packages - it is not surprising that international travel for pleasure is affected only marginally by unfavourable prices and exchange rates.

NOTES TO CHAPTER 2

1 Turner & Ash (1975) provide an excellent discussion not only of the 'Grand Tour' but on the history of tourism as it dates back to Greek times.

2 The continued growth of relatively new vacation destinations has resulted in a 60% increase in traffic to the South (Caribbean, Central & South America) in the 1980's alone (Statistics Canada 1988b:118).

3 Canada's three major airlines all provide holiday packaging: Air Canada = Touram; Canadian International = Treasure Tours; Wardair = Wardair Holidays. Each has introduced new services and increased both existing scheduled and carter flights to the South and Europe (Statistics Canada 1988b:118).

4 The majority of mass tourists leaving Canada continue to be couples (50-65%), with the strongest segment (35%) falling between the age of 35-50 years.

CHAPTER 3

TOUR OPERATORS AS ENTREPRENEURS

The previous chapter draws an historical sketch of the development of international tourism as it affected the western industrialized world. The tour operator was born in response to a growing demand for services to travel beyond their home region. This chapter outlines the various activities the tour operator must involve himself with in order to be a successful entrepreneur in that process. It describes his activities as a negotiator, contractor and organizer of a vacation package designed for the Canadian public. The section will conclude with a discussion of package tour operators' position relative to the overall travel economy in Canada. Below are definitions of the wholesale industry and package tour operators as I refer to them in the following pages.

Wholesaling is the business of planning, creating, producing and marketing tours or tour components which are sold to the travelling public through retail travel agencies. Loosely defined, wholesalers are representatives of travel suppliers (hotels, airlines, cruise lines, car rental companies, etc.) who act as brokers between these

suppliers and the travel agent who acts on behalf of the consumer (Hyndman & Badger 1982).

Actual wholesalers differ from tour operators proper in that each tour component is booked after it has been requested by the agent. Thus it is unnecessary for the wholesaler to maintain any 'inventory' of product, and consequently they do not experience the same risk as do tour operators. In spite of this difference, for purposes of the present analysis, 'wholesaler' and 'tour operator' will be used synonomously.

The tour operator goes one step beyond the actual wholesaler by packaging the various components of travel into a complete entity for sale to the consumer. It is important to note that, as a result of economies achieved through bulk purchasing of the various components making up vacation travel, tour operators today play a part in almost every segment of travel industry activity. Some tour operators act as their own retail agencies, others remain on the wholesale side only, selling their tours through other travel agencies (Ibid.).

For the purposes of this analysis, Canadian package tour operators are categorized into two general types:

1) Mainstream Tour Operators - packagers who create and offer tours for sale to the mass market; their success

depends upon high volume sales, the bulk of which is comprised of winter holidays to sun destinations.

2) Specialty Tour Operators - packagers who create and offer tours for sale to a small, more exclusive percentage of the travel market; success is based upon their expertise - or specialized knowledge - in a particular destination or particular segment of that market.

3.1 Operations

The secret behind the success of package holidays is the concept of volume buying. By offering to sign long term contracts for chartered aircrafts and blocks of hotel rooms, tour operators are able to buy the basic ingredients of the average vacation - air, hotel, and transfers - at rock bottom prices. Hence, they lower the cost of a package vacation. Package tours can be categorized into two types: basic tours and all-inclusive tours (Sheldon 1986:360). The basic package consists of the tour essentials as listed above, while the all-inclusive tour includes meals, a full program of sightseeing and entertainment, and is often escorted.

The negotiation and signing of contracts between Canadian tour operators and destination personnel (eg. hoteliers) necessitates direct contact and interaction

between representatives from both regions. This aspect of tour operations is integral to the study of how packagers act as intermediaries between the guest and host regions involved in the tourism process. Negotiations between operator and host may involve a network of personal relationships: several informants stressed the importance of 'old-boy' networking in the travel business.

Travel industry networks are nurtured by initiatives taken by both the tour operator and the destination personnel. Buyers sent from Canadian operators may scout new areas for packaging potential, while hoteliers and other suppliers at various destination spots may likewise promote their product as suitable for sale to the Canadian travel market. The element of personal trust in any network is important to tour operators. As a case in point, one large operator agreed to package a new hotel in a new location solely on the basis of their long-established relationship with the Spanish hotelier who built it.

When choosing a hotel in a new destination, buyers generally engage in extensive negotiation with various hospitality personnel in order to create a well-rounded package suitable for sale to Canadians. At the destination end, the major concern of mainstream tour operators is to negotiate hotel contracts at volume discounts. The contract between the tour operator and the supplier can be of two

different types involving either block reservations or block purchases (Sheldon 1986:253). The majority of the Toronto operators interviewed make a block reservation with their supplier for the number of units expected to be used. Negotiations are usually done for the year ahead, the period for which brochures are printed. This type of contract allows the tour operator to reduce financial risk by receiving payment from clients in advance. The tour operator must then notify the supplier of the number of units required. The hotelier is free to resell any unused units.

A block purchase is a less common type of contract; it gives the operator full title to the product but also commits him to pay the supplier regardless of how many units are sold. This type of contract is used most often with airlines who are in a strong bargaining position or when tour operators are confident of selling adequate volume.

It appears that specialty operators find themselves involved in a more complex negotiation process. By virtue of the adventure or off-beat nature of their packages, program design must include, in addition to accommodation, meals, on-land transportation, tour itineraries guides, equipment, etc. Holidays such as African safaris, elephant treks in Nepal, or Baffin Island home-stays are necessarily all-inclusive. Negotiations may entail discussions with park officials, community leaders, or local people interested in

participating at some capacity. Areas newly opened to tourism, such as China and Cuba, do not generally allow for direct negotiations with hoteliers; rather, discussions are with a national travel service and usually remain somewhat one-sided, centred upon the availability of what a tour operator would like to include in a package.

Unlike other consumer products or services, the tourist product is marketed at two levels: by the destination as an overall attraction, and by the travel industry as a means to that attraction. A national tourist organization is typically engaged in a marketing campaign to create an identifiable and persuasive image of the attractions in their country, aiming this image at particular generating regions. Under this umbrella campaign, the various suppliers of tourist services can market their individual component of the total product.

However, the tour operator, by co-ordinating the policies of individual suppliers, conducts an entire marketing campaign, from formulation of the product to its ultimate offer for sale and consumption. More often than not it is the destination tourist board that conducts the necessary research and then markets their product to relevant operators via familiarization trips and the like. Operators often capitalize on the public marketing message of the tourist boards to advertise their own package.

3.2 Destination Criteria

Aside from a warm, sunny climate and good beaches, mainstream tour operators guide their choice of destination by four basic criteria. First, proximity is of major significance as it affects and determines both cost and time of travel. Florida or the Caribbean, for example, cannot be sold on the same basis to Western Canadians as they can be to Eastern Canadians for whom direct and relatively short flights out of Toronto can be offered at quite a cheap fare. Tourists from Vancouver, on the other hand, find a more accessible and affordable beach in Hawaii or the South Pacific. Proximity therefore restricts the 'global marketing' of destinations, especially as this pertains to a mass travel market. For specialty tour operators, distance is less important, taking second place to the quality of adventure the destination region has to offer. For tourists looking for the exotic and the unique, a lengthy travel-time is of little significance and may in fact enhance their anticipation of it.

Likewise, cost-value of an holiday is less important to the adventure tourist who expects to pay more for 'something different' than to the sun-vacationer. Mainstream tour operators consider the 'value for dollar' a destination can offer another major criterion in choice of what and where to package. Operators define value in terms of

affordability to middle-income Canadians who compose the bulk of the mass travel market. It is more difficult, for example, for a tour operator to sell sufficient quantity to sustain charter flights to the Cayman Islands - where hotels are priced from $100-150/day - than to sell Jamaica only a hundred miles away, where hotels run at $25-30/day. As will be discussed later, Canadians tend to be very price-conscious, a feature perhaps attributable as much to the travel industry as to national character.

A third destination criterion regards tourism infrastructure: airport facilities, ground handling, airport-hotel transfers, and hotel standards are all evaluated before packaging begins. The ability of an airport to handle charter flight programs and the availability of adequate quality accommodations are imperative. The destination must be capable of accommodating a weekly minimum of 120 passengers, the capacity of the smallest charter aircraft.[1] The variety of activities outside the hotel, including shopping and sightseeing, whether or not English is spoken, and the quality of local food and water are also important.

The relative political safety a destination presents is a fourth criterion. Political stability bears not only upon the economic security a tour operator demands before investing time and money into creating a package, but also

upon the 'perception of safety' the tourist demands before visiting another country. This includes the reputation the destination has acquired for tourists being hassled on the beach or sidewalk. Most package tour operators, especially those marketing to the masses, wait until a politically unstable area is safe again before promoting or resuming tours there. If for no other reason, the media can 'kill-off' a destination by over-sensationalizing their political troubles. In most cases, however, a professional attitude among tour operators precludes the risk of jeopardizing the health and safety of their clientele.

In contrast to mainstream operators, the destination criteria of specialty tour operators differ by virtue of their underlying philosophy. Their goal is not to sell volume, but to sell the 'missing element.' This can be interpreted as unique features about a well-travelled destination that most tourists remain unaware of - touring rural France by bicycle, for example - or as the introduction of more remote or newly opened destinations, such as Nepal or the southern provinces of China. The missing element may include the degree of cultural distinctiveness a destination offers (eg. non-western, foreign-speaking hosts) as well as its educational value (eg. the 'roots of civilization' as presented by archaeological ruins in Mexico, by art history in Europe,

etc.). How the tourists travel is often as important as where they travel; novel modes of overland transportation such as bicycle, landrover, horseback, hiking, and even camel-caravan are utilized to present a different perspective of the region being visited. Specialty operators marketing these 'adventure tours' stress an element of experiencing (versus visiting) a destination as a selling feature of their packages. Their expertise in packaging an element of uniqueness in the destinations they choose to promote gives specialty operators the edge they need to survive in competition with high-volume mainstream tour operators.

Tour operators that cater to a specific age segment, such as 18-35's or senior citizens, or to special-interest groups, such as professional or religious groups, rely in part on feedback from their clientele for what new destinations or new aspects of familiar destinations to offer. In response to demands to visit regions further afield, an operator specializing in the seniors market increased their destination choice to include Australia and New Zealand, Kenya, the Orient, and most recently an Around-the-World tour. Another operator has taken an aggressive role in creating and promoting special interest itineraries for particular professionals, such as China tours for

medical personnel that include visits to acupuncture clinics in addition to more standard sightseeing.

3.3 The Problem of Seasonality

Like any business, package tour operators face the challenges of competition and of daily operations. However, as part of international travel operators have the additional problem of what to do during low season. Seasonality is a priority issue with most mainstream operators whose bread and butter is sun-holidays sold to a winter market. Some operators are quite successful in balancing their winter sun season with tours to Europe and reduced-rate summer packages to the Caribbean or Mexico. The summer business tends largely to be ethnic populations going overseas to visit friends and relatives (VFR) or students and teachers whose holidays fall between May and August. Nevertheless, many Canadian travellers prefer to at home in summer to enjoy the cottage at the lake or to take a car holiday within North America.

Reduced hotel rates and airfares to sun destinations are beginning to offset the summer/winter imbalance. Canadians are beginning to take advantage of these bargains as worthy of giving up one summer-holiday at home. Further, longer vacation time than in the past allows Canadians to spend a week overseas with time enough left over to enjoy

their own summer sun. However, tour operators do not wait for Canadians to decide to travel overseas during low seasons. In 1971, for example, the first one-week Group Inclusive Tour (GIT) was offered to encourage off-season travel (e.g. a London Show Tour or a ski package to the Alps). It seemed to fill a need: sales zoomed and it soon proved more popular than two-week tours (Financial Post, Sept.1 1973:11). Now operators also offer special promotional programs during the summer months to encourage Europeans to come to American zone resorts and to encourage corporations to rent air and hotel space, offering employees and guests a blend of business and relaxation.

The cheap inclusive holiday in summer is proving to be one of the most effective devices in tackling the problem of seasonality. Hotspots in Oceania and in Latin America, of which Mexico is a major component, have steadily enlarged their share of the Canadian spring market. The progressive improvement in the high/low season sales ratio means less critical cash flow problems for the tour operator, his airline, and the retail travel agency.

3.4 Tour Operators in Relation to the Canadian Import Travel Economy

The dramatic growth in international travel by Canadians has led to the subsequent growth in travel-related

industries, to become an important part of Canada's domestic economy. Tourism ranks second only to the automobile industry as Canada's export earner and as import expense (Royal Bank Report 1988:12). In terms of import payments, Canadians spend more money in foreign destinations than do foreigners visiting in Canada.

The entrepreneurial efforts of tour wholesalers and operators has resulted in a majority share of 55% of total revenues of travel services in Canada; the remaining 45% is shared by ticket and travel agencies (Refer to Table 2.A). By virtue of bringing together all the components of a holiday together tour operators assert to being the only true tourism marketers in the travel business. They claim to fill a gap of travel creativity otherwise left empty by airlines, hoteliers, and retail travel agencies; tour operators consider themselves an extremely important link between the host and guest regions.

The best estimates of the importance of wholesalers in the Canadian industry must be extrapolated from statistics of charter flights most of which are operated or contracted by package tour operators. Over the past ten years, the volume of air charter passengers has increased 43% from 2 to almost 4 million trips. Approximately 60% of these passengers were destined overseas, the remainder flying to the USA (Statistics Canada 1987; 1988b). Overall,

one in every ten airline passengers leaving Canada in 1980 travelled on a charter flight; in 1986, on average every seventh was a charter passenger.[2] Today charter flights account for 20% of air transportation passenger revenues amounting to over a billion dollars (See Table 3.A & Figure 3.1).

The Canadian Tourism Attitude and Motivation Study (CTAMS:1982) found that overall, 8% of the trips studied involved a package. As part of Canada's International Import Travel Account, which in 1986 amounted to almost $7.5 billion, package tours generated payments by Canadian tourists of approximately one and a half billion dollars

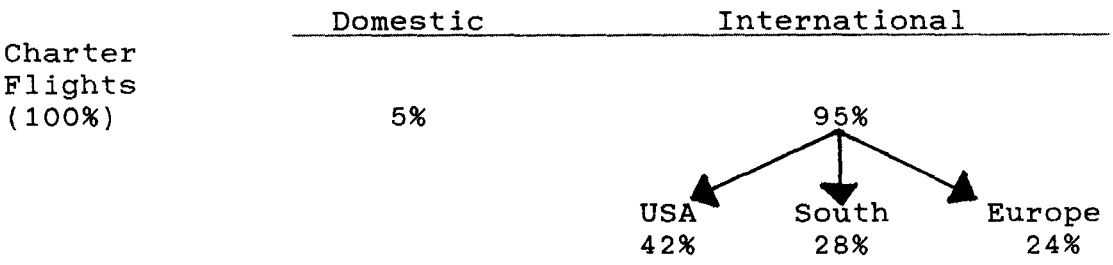
TABLE 3.A Number and Percent of Passengers by Region and Type of Service 1986 (thousands)

	All regions	Scheduled	Charter
Domestic	12,456	12,260	196
Internat'l	15,575	11,976	3,599
Total (100%)	**28,031**	**24,236 (86.5%)**	**3,795(13.5%)**
USA, (100%)	9,349	7,740 (83%)	1,609 (17%)
South*, (100%)	1,968	914 (46%)	1,054 (54%)
Europe, (100%)	3,288	2,360 (72%)	928 (28%)

*South includes the Caribbean, Central & South America

Source: Statistics Canada 1988b

FIGURE 3.1 Distribution of Charters by Region 1986



Source: Statistics Canada 1988b

(Royal Bank Reporter 1988). Thus, in monetary terms at least, package tour operators represent a travel business segment of considerable magnitude.

The ways in which tour packaging firms operate, select destinations, and deal with seasonality problems all bear upon their position as intermediaries in both the host and the home regions. For the host, they provide a personal link to an important source of tourists through the necessary negotiations and networks Canadian operators hold with destination personnel. In the home region, operators offer a selection of destinations that complement Canadian travel demands and motivations. Thus, packagers also interact with their market who is the ultimate guide for choices operators make during package design. In turn, Canadian travellers respond to new styles of vacationing introduced by tour operators as a solution to poor low season sales. In the final analysis, it is the operational

character of tour packagers as entrepreneurs that initially places them as brokers in the tourism process.

NOTES TO CHAPTER 3

1 Hotels with at least 90 rooms, thus allowing for one and two-week vacation overlaps, are the general requirement.

2 One must take into account that the distinction between scheduled and charter flights is not as significant to the traveller as it was previously, because of the variety of discount or charter-type fares available on scheduled flights (Statistics Canada 1980).

CHAPTER 4

TOUR OPERATORS AS INTERMEDIARIES AND INNOVATORS

Thomas Cook was the first tour operator with a vision to bring travel to the masses. Since that time, the package tour industry has been in the business of creating new and larger markets for their product. In this sense, tour operators are more than just entrepreneurs, they are innovators. In Canada they continue to create formerly non-existent market demands for travel destined to regions previously unvisited by Canadians. The package tour operator plays an active role in the tourism process as an intermediary between the generating region and the destination.

A key to my analysis of the innovative and intermediary role played by package tour operators is the concept of 'broker.' Anthropologically, this concept has primarily been applied to the study of political structures, usually alongside observations of political middlemen.[1] The political middleman is a type of bureaucrat who mediates between larger and smaller political structures often with a view to patronage or power. Brokers, on the other hand, are entrepreneurs, "expert network specialists" who "place

people in touch with each other for profit" (Boissevain, In Rodman & Counts 1983:20).

Anthropological studies have also been concerned with economic brokerage (eg. Geertz 1963, Gonzalez 1972, Long 1975).[2] From this perspective tour operators are brokers "who play a major part in connecting local production systems with the wider socioeconomic frame-work and who control the crucial sets of relationships involved" (Long 1975:273). The concept of economic brokerage identifies tour operators' strategic position in the system of linkages between the local tourism economy and the wider international structure. It also recognizes the 'old-boy' networks of social relationships used by tour operators to consolidate their positions.

Tourism case studies that deal with brokerage roles tend to concentrate on individuals engaged in cultural mediation and communication between hosts and guests (eg. Nunez 1963, Smith 1978, Evans 1981).[3] A local guide or a tour company destination representative are examples of this type of broker. However, brokerage also occurs on a more corporate plane where tour operators link groups of tourism-consumers with local suppliers such as hotel managements.

One of the defining characteristics of a broker is that he operates in both local and extra-local arenas (Long 1975:274). Culture-brokerage in tourism involves the

organization and retail of destination services sold for Canadian tourist consumption. Most simply, package tour operators are profit-oriented communicators who relay information from supplier to consumer. To comprehend this process requires an appreciation of how tour operators manage their affairs in several geographically distant localities.

This chapter gives weight to the brokerage role as it is played by Canadian tour operators in the generating region. It also addresses their role in destination regions and concludes by evaluating the consequent importance and necessity of the tour operator as broker.

4.1 Brokerage in the Generating Region

For the Canadian tourist, tour operators play an important role by offering their accumulated experience and expertise of each destination it packages, plus their access to the most cost-efficient way to tour there. They organize the details of travel and vacation for people who are too inexperienced or too busy to plan for themselves. It is important to Canadians that particulars are looked after, confident that no surprises or worries will confront them upon arrival at the destination.

The segments of the Canadian travel market most dramatically affected by the activities of tour operators

over the past forty to fifty years fall within the status-income and the age categories. These are discussed separately below.

4.1.1 Pluralization of the Market

A phenomenal gap has been filled by tour operators in opening up travel to the masses. In the past 15 to 20 years, inexpensive charter flights, inclusive and group tours have encouraged the creation of a hitherto non-existent average-income travel segment.

Tour operators direct their packages to a travel market which today is comprised of members of virtually every segment of the Canadian social fabric - from blue collar worker to top-level executive, from school-age children to senior citizens (See Table 4.A). The tendency toward more frequent and distant travel by Canadians of all status, age, and income groups is indicative of what I call a 'pluralization' of the travel market.2

Travel as an earned or inherited right is now history. Today, most youth expect to backpack across Europe, some before they have become income earners. Many Canadians are enticed to vacation overseas - to the islands at least - whether they can afford it or not. Tour operators believe that Canadians have determined that although more important things could be done with disposable

TABLE 4.A Demographic Characteristics of Vacation Travellers (% of Specific Market Segments)

	Incidence of Vacation Travel	
	1970	1984
Total Adults	54	55
Occupation		
White Collar	68	67
Skilled Labour	55	57
Unskilled Labour	46	40
Farmer	36	47
Retired	43	49
Sex		
Male	52	52
Female	57	58
City Size		
Urban	59	57
Rural	41	47

Source: Tourism Canada 1984

income, they are unprepared to give up their right to go, to see, to do. In this sense, travel has become a social norm, a need as much as a want.

This attitude lies within the general consumer trends evident in the Canadian marketplace. The Toronto Star reports that what were "yesterday's novelties are today's necessities" (October 22, 1988:B4). By the mid-sixties items that had been luxuries - such as televisions, telephones and even refrigerators - were commonplace; homes without them were considered unusually deprived. Now a whole new range of technological innovations are considered essential to the

Canadian way of life. Many of these are leisure-related technologies: cable TV, pay TV, and video cassette recorders.

The character of necessity that travel has acquired is a drastic change observed by the industry over the past 15 to 20 years. Tour operators describe Canadians as 'packed and ready to go': discretionary bank accounts plus flights leaving every hour to any number of destinations have provided means of escape from a cold winter, a high-pressure job, and hectic urban life. While the price of travel tours and the overall travel price index has increased at a rate (38% - See Table 4.B) equal to Personal Disposable Income (37% - Refer to Table 2.B) during the 1980's, the rate of outbound travel continues to rise steadily (a 44% increase). This suggests a change in Canadian priorities toward discretionary income.

Tour operators interpret the change as a priority to spend and enjoy now rather than pay off the mortgage and save for the future. This new attitude, they conclude, has further pluralized the market across all socio-economic classes. Operators also perceive an increase in the number of double-income households to be a factor in increasing the ability of Canadians to make overseas vacationing an integral part of their lifestyle.

TABLE 4.B Selected Price Indexes, Canada & The United States 1980-1987 (1981 = 100).

	1980	1984	1987
Consumer Price Index* (all items)			
Canada	88.9	122.3	138.2
USA	90.6	114.2	125.0
Travel Price Index*			
Canada	86.3	126.4	145.9
USA	88.6	113.8	125.2
Air			
Canada	84.2	142.7	193.0
USA	77.2	123.6	143.6
Travel Tours			
Canada	84.0	109.0	135.2

*CPI: measures the percent change through time in the cost of purchasing a constant 'basket' of goods and services representing the purchases by a particular group in a specified time period. The 'basket' is of unchanging quantity and quality and changes in the cost are therefore due only to 'pure' price movements.

*TPI: measures the percent change in the cost of purchasing a constant basket of goods and services related to travel.

Source: Statistics Canada 1988b

However, tour operators do not simply respond to a pluralized market; they also aggressively participate in creating and moving that market. Thus, a dialectic relationship exists between Canadian travellers and tour operators. Many specialty tour operators are slowly shifting from an upscale marketing tendency to become more mass appeal with more middle-price range packages. Mainstream

marketers now target reduced and affordable summer packages to blue-collar workers during summer plant closures and families during school vacation. The discounts operators are able to negotiate with hoteliers, for example, are passed on to consumers who might otherwise believe themselves unable to afford an overseas holiday.

The perception of vacation and travel as a requisite to the survival and enjoyment of life in Canada may lead to anticipatory saving behaviour. One package tour operator calculated the 'minuscule' weekly or monthly amount to be saved in order to buy an exotic holiday a year hence. In marketing expensive and exclusive tours several tour operators interviewed emphasized the value and reward of temporarily depriving oneself of cigarettes, restaurant meals, or an updated wardrobe. The underlying principle of such behaviour is that the act of setting money aside for a future trip is an endeavour admired by one's peers.

Travel, although considered a necessity, tends also to be associated with a luxury category of goods. It is a powerful inducement for some to violate the normal constraints of their income to make an exceptional purchase. Tour operators believe that much of what constitutes the North American idea of a dream vacation is its emphasis on luxury. Brochures advertising land holidays in which physical involvement is an integral part - such as cycle

tours in Europe - balance labour with luxury by emphasizing the grand chateau and gourmet dinner awaiting the participant at the end of each day. A week or two on a cruise liner represents the ultimate of exotic luxury. Fully aware of the fact, one cruise operator interviewed offers budget-type accommodation (inside cabins without portholes) for half the regular price. While a certain amount of luxury is sacrificed, this is considered a minor trade-off for the opportunity to experience the 'ambience of cruising.'

Alongside the boom of mass tourism, most of the tour operators in the sample continue to package upscale vacations to particular destinations. Cancun and especially Grenada are destinations packaged expressly for the elite, and special packages such as a London Show tour cater to that small percentage of the travel market who have a greater disposable income and more 'sophisticated' tastes. Individuals in the over $100,000 income bracket who have tired of the 'sun circuit' and are looking for quality experiences with more integrity can book upscale tours such as Gourmet Cycling in France. These tours tend to attract career-oriented professionals without the time to plan their own trip yet with the hope of achieving some personal objective or physical challenge. Because of the small market segment upscale products appeal to, they are most frequently

packaged by specialty as opposed to mainstream tour operators.

Despite the pluralization of the Canadian travel market, distinctions remain visible (Refer to Table 4.B). Individuals in lower socio-economic groups, including those with high school or public school education, unskilled labourers, and again, people living in rural areas, travel least (Tourism Canada 1985). The incidence of vacation travel by unskilled labour has, in fact, decreased 6% since 1970. Topping the list of those that take proportionately more vacation trips are university educated, white collar workers. In these terms, travel has not lost its significance as a mark of social status.

4.1.2 Age Segment Trends

One of the most significant markets in the travel business today is older people with spending power. More than 10% of Canada's population is 65 years or older; within another decade the proportion may increase to over 15%. Canadians over fifty are among the heaviest consumers of expensive lifestyle products. They travel widely, more often than not two or three times a year, often by plane (Chisholm 1989). Now that the travel industry has recognized the potential of the mature market, senior travellers are enjoying a new form of VIP treatment. Travel press articles

report that bargain hunters in the 55-plus category are practically guaranteed money-saving perks most of the year (Toronto Star October 22, 1988:H6,H33). For example, both Air Canada and Canadian Airlines International offer seniors 20% discounts to all domestic and some American destinations.

The buying power of Canadians who are now over fifty has been building steadily for the past four decades. Most of the individuals in the group entered the workforce, bought homes and began a savings program during the long economic boom that followed the Second World War (Chisholm 1989). A tour operator specializing in seniors' travel informed me that the seniors age travel segment begins at a younger age now than in the past. Ten years ago the escorted market consisted of 70+ age individuals who discovered travel only later in life after the children had left home and the mortgage was paid. The 1930's depression and two world wars they created an extremely money-conscious group. But, depression era habits of saving also resulted in significant pools of capital.

Today people buying seniors' packages average between 55-60 years of age. Early retirement, better pension plans, the declining need to leave an inheritance for the children, and the realization that age-related physical limitations may inhibit travel, has shaped a new outlook

towards life that says, 'live life for now!' This impression is supported by a recent Maclean's feature which reports an attitude among those over fifty who believe "spending money is a part of enjoying life" (Chisholm 1989:25). Seniors are living longer, healthier lives and dispelling the common misconceptions that people over fifty are excessively frugal, physically frail and afraid to leave the security of their own homes.

Mainstream tour operators in the sample have increased their sales force to focus on both matured and maturing markets with packages that allow more free time to relax, are slow-paced, and of longer duration. Realizing that there is a big market for seniors who are not satisfied with just a one- or two-week charter holiday, operators are coming up with arrangements that provide longer stays. Club programs that offer special airfare and hotel discounts appeal to the growing number of Canadian seniors who prefer to spend winter in a warmer climate.

The children of the post-war baby boom advancing into their middle years have a set of travel tastes less affected by the pressure of children than former generations. However, the number of young families taking overseas tours has grown steadily over the past two decades. Babyboomers who now have their own children increasingly desire to take them along on their vacation. Thus hotels

that offer children's programs and babysitting facilities are becoming more popular and in demand. In the future this may help to alleviate summer-slump problems in sun destinations, as most families would prefer not to take their children out of school during the winter.

The sense that the babyboomer segment is tied to family obligations yet interested in vacationing as a unit has prompted several tour operators to introduce special family rates and packages. Modifications include less luxurious accommodation, more flexible menus, and greater variety in activities. One company has pioneered club-style packages for families with children four months and older as well as vacations villages designed for children unaccompanied by their parents.

The younger generation of Canadians today have grown up in a social environment familiar with travel. Relatively easy access to funds, either through summer and part-time jobs or through loans from banks and fathers, plus a variety of travel options targeted at students and young adults has brought overseas travel from novelty to norm for the 18-35 age segment. In the past few years, package operators that cater exclusively to this age category have watched it divide into two: one consisting of college and university students aged 18-25 and another of young professionals aged 25-35. These two groups claim different expectations and

demands, with the latter willing to pay for a higher standard of creature comforts and less emphasis on 'partying 'til you drop.'

4.2 Brokerage in the Destination Region

Package tour operators attribute a significant percentage of the international tourist flow out of Canada to their efforts in providing easy and affordable access to overseas destinations. This claim is supportable not only by the enormous increase in the number of charter flights over the past 15 years, but also, to a large extent, by the success and growth of tour operations in the Canadian travel industry.

For the destination region, this is translated into major contributions to the development of tourism in their area. Because scheduled flights often do not service most destinations, it is the tour operators with charter flights who are responsible for bringing tourists to an area otherwise not reachable. In some areas, operators claim to make or break tourism: in St. Kitts, for example, the number of Canadian tourists rose from 1200 independent travellers per year to 300 charter tourists per week. Economic expansion was perceived locally as both immediate and beneficial by the overnight growth of villages of hotel construction workers and hospitality employees.

Tourism is an important source of foreign currency for underdeveloped countries; packages attract currency on a regular (albeit seasonal) basis and require less investment on the part of the local authorities. Packagers make long-term financial commitments in the form of block reservations and rentals; Club-style operations are the most obvious example of this kind of tourism investment. Contributions to the development of tourism through the maintenance and improvement of facilities and in training staff on the essentials of international hospitality has been influential in shaping tourism according to western expectations. Exclusivity rights given by the Cuban tourism commission in exchange for upgrading and marketing resorts is an example of the influential position Canadian tour operators have found themselves in the tourism development process.

Package tour operators are the medium through which tourists are generated in volume. Thus, a great loss would be incurred by destinations if package tour operators were not in Canada to mass market them. While this is important to a greater extreme for national tourist bureaus with a small financial balance, it has proven beneficial to hoteliers in wealthy areas such as Florida who had to advertise privately in Canadian newspapers before packages became available. In more remote areas such as Baffin Island, there is a strong recognition of the necessity for a

professional tour operator with urban headquarters and resources to finance the printing of brochures and to market the product internationally.

Adventure tour operators are particulary conscious of the importance of preserving and conserving the environment in destination regions. Aside from being a sign of social responsibility, the future availability of a healthy and beautiful environment is imperative to the livlihood of adventure packagers. Whereas specialty tour operators play a minor role in bringing masses of tourists to a destination, they exert greater influence in supporting the local ecosystem and bringing awareness of the country's natural beauty and wealth to the Canadian public.

One tour operator interviewed believes that the most positive side of these new travel opportunities for average-income Canadians is that they are allowed to experience the world and come in contact with other people. As more and more individuals see wilderness areas and realize their value, the better able they may be to relate personally to environmental and social problems in other countries. At best the operator hoped that his clients return home as more aware proponents of foreign contributions and needs.

Sentiments like the one expressed above illustrate the unfortunate and ambiguous nature of tourism: while it puts more and more individuals and cultures in touch with

each other, it often negatively tampers with areas of natural beauty and remote wildness. The dilemma is that the more areas tour operators open up and the more people they send, the greater the social and environmental effects.

The size of the tourist dollar that specialized packages bring into a country is often insignificant compared to what mass tourism could produce. Nevertheless, the adventure operators are able to offer a piece of the tourist pie to areas peripheral to mainstream activity such as safari packages that require guides and pre-booked lodge accommodation, and tours into remote places like the Galapagos or Namibia.

4.3 The Importance of Tour Operators in the Brokerage Process

From both an objective and a subjective viewpoint it can be stated that the tour operator industry is needed. Not only do they increase occupancy or usage rates and reduce promotional costs for suppliers, but they also reduce the cost to travel agents and consumers of locating information on the destination. Transaction costs are also reduced since communications and bookings with many different suppliers are reduced to one.

By contributing the bulk of the tourist flow - to sun destinations particularly - tour operators provide a vital link from the host to the guest region. Whether or not

they provide the main links with the regional or international economy or control the crucial sets of economic relations involved are important questions beyond the scope of this thesis.

Nevertheless, there appears to be an important need for someone who understands both the host and guest cultures to interpret differences in lifestyle and technological standards. Thus, the tour operator takes on, in part, the more scripted character of culture broker. As a packager of dreams, it is in the tour operators best interest to prepare and introduce the tourist to vastly different aspects of a destination region that could result in a nightmare. For the tourist with only two weeks to spend in New Delhi, for example, it is important that the tour operator eliminate the technical details of travel. The provision of representatives at each destination to give an on-site orientation and to trouble-shoot immediate problems is an irreplaceable service in this regard. An underestimated and underemphasized aspect of packagers is their potential role in educating the Canadian tourist about distant and first-time destinations.

The indispensability of the middle segment to exist is perhaps more a result of the opportunistic development of the wholesale industry than it is a cause of demand

initiated by consumers and suppliers. Tour operations emerged out of a perceived opportunity to create a demand for services that had hitherto not existed. Once the demand was there, it raised the wholesale industry to an essential position.

Package tour operators can be considered as somewhat of a pioneer in the field of tourism by their role in opening up new travel regions to the Canadian public and new opportunities for local tourism in these regions. However, operators and wholesalers see their role in the tourism process as a major one not by design, but by default. The style of holiday they package and the destinations they sell is fashioned after what an operator must do to survive in a competitive travel industry. Ultimately, the long-term goal of an operator is not to open up new countries to tourism or to broaden Canadian perspectives, but to learn what is profitable and to adapt to and expand their share of the travel market. Theirs is not a corporate mission, but rather an entrepreneurial endeavour.

NOTES TO CHAPTER 4

1 For a list of references of studies on brokerage processes, see Rodman & Counts 1982:7-8.

2 Geertz, C. 1963. Peddlers & Princes. Chicago: University of Chicago Press.
Gonzalez, N.L. 1972. Patron-Client Relationships at the International Level. In: A. Strickon & S.M. Greenfield, eds. Structure and Process in Latin America. Alberquerque: University of New Mexico Press.
Long, 1975 is listed in the Bibliography.

3 Nunez, T.A. 1963. Tourism, Tradition, and Acculturation: 'Weekendismo' in A Mexican Village. Ethnology II (3) 347-352.
Smith, V.L. 1978. Eskimo Tourism: Micro-models and Marginal Men. In: Hosts and Guests: The Anthropology of Tourism. The University of Pennsylvania Press, Inc.
Evans, N.H. 1981. The Process of Mediation in Tourism Interaction: A Case Study of Puerto Vallarta, Jalisco, Mexico. Ph.D. Dissertation. Riverside: University of California.

4 'Pluralization' is here defined to mean the inclusion of more than one class of people participating in the tourism phenomenon. It refers to the democratization or popularization of international travel and leisure.

5 One must take into account that the distinction between scheduled and charter flights is not as significant to the traveller as it was previously, because of the variety of discount or charter-type fares available on scheduled flights (Statistics Canada 1980).

CHAPTER 5

TOUR OPERATORS AS COMMUNICATORS

As brokers, package tour operators are characterized as entrepreneurs, intermediaries and innovators; they are also 'profit-oriented communicators.' Tour operators relay information from the supplier-host, to the consumer-guest. At home, this is done by marketing certain images of travel leisure and recreation that are meant to be both sensitive to Canadian needs and wants and competitive with the images other operators present.

This chapter deals with tour operators as communicators who strategically select and market sales-competitive touristic images. I discuss the discourse of package brochures and marketing responses to current trends in the Canadian travel market. The surprising lack of market research used by tour packagers is interpreted in the final section.

5.1 Image: Perception and Creation

Vacation images are the result of a dialectic relationship that exists between the package tour operator who creates these images and the tourist who perceives them. The sum total of information received from previous

experience, the media, and so on forms one's image and expectations of a vacation (Schreyer & Beaulieu 1986:233). A tourist's image may consist of many constituent elements, both subjective and objective and may in fact have little to do with the actual nature of her destination.

Touristic images are dynamic: they are processes that evolve through ongoing interactions with different destinations and types of travel. Attributes of an advertised package tour perceived by the tourist may recall other attributes correlated with a previous trip. This creates a "composite image uniting implied and imputed characteristics" which influence the individual's choices (Ibid.234).

Tourists are motivated not by the specific qualities of the destination, but rather by the matching of a destination's major attributes to the tourist's needs (Uzzell 1984). The destination image is affected by the perceiver's wants, purposes, preferred attractions and anticipated behaviour associated with the vacation. Further, the tourist's social context and cultural values filter the social meaning given to a destination. 'Internal images' are thus linked to the tourist's external perceptions of a place.

Tour operators have discovered the secret of successful prepackaged trips "lies not in the destination

but in the eye and soul of the traveller" (Jones 1988:33). An operator in the sample who sells all-inclusive resort packages, for example, noted a variety of Canadian concerns, attitudes and priorities of time and money. He abstracted from these the notion of relief from the hassle of alarm clocks and paying bills, using these images to create a new image of freedom from the cares and worries of 'civilization.' Positive images of the 'primitive,' of 'paradise,' or of 'romance' are projected in opposition to their negative counter-images.

5.2 Travel Advertising: Tour Brochures

The potential tourist's image of a given place is largely constituted by the information received from travel advertisements. Tour operators' main selling aid is the brochure. Generally lavish publications with glossy photographs and poetic descriptions of the destination, brochures are distributed widely to retail travel agents. The public is then urged to obtain the brochure by mass media advertising including newspapers, television, and travel shows.

Uzzel (1984:234) separates holiday advertisements into three levels: 1) images of the sun, sea, sex and sand provide a powerful surface structure; 2) images focus on those attributes of the destination which contribute to the

identity the tourist wants to undertake, and; 3) images provide a set of cultural, social, political and economic assumptions out of which the tourist can assemble reality and fantasy. In sum, Uzzell proposes that tour operators and holiday brochures provide the tools with which tourist may create their own fantasies, images, and selves.

McCracken (1988:77) describes advertising as "an instrument of meaning transfer" in which the consumer good and a representation of the culturally constituted world are brought together in a special harmony. Travel brochures, however, differ in that they attempt not to present symbolic equivalence between world and good, but rather to display contrast between a mundane, everyday world as it exists in the reader's mind's eye, and an image of exotic 'otherness'. The brochure discourse is generally set in the future tense: it speaks of 'the world you are about to enter,' how 'you'll discover,' what 'you'll find,' how 'you'll always be greeted with a smile,' and how your destination 'will not let you want (for satisfaction).'

Most advertising causes the known properties of the world to be resident in the unknown properties of a consumer good. In contrast, vacation advertising frees the consumer from what is known to anticipate an element of the unknown. The transfer of meaning from real world to tourist-good is thus accomplished by their perceived opposition to each

other. This is consistent with theories of the leisure class such as MacCannell presents, in which differentiation is seen to be "the origin of alternatives and the feeling of freedom in modern society" (1976:11).

The final author in this process of meaning transfer is the consumer, the brochure reader (McCracken 1988:79). The package tour operator must select images from a set of alternatives established by the network of cultural categories and principles in terms of which culture has constituted the world. The potential tourist effects the transfer of meaningful properties and thus is an essential participant in the process of meaning transfer. The work of the brochure writer is completed by the reader who, in part, must engage in a willing suspension of disbelief.

In addition to brochures, 'word-of-mouth' is considered an important source of new and return-patrons. Tours cannot be inspected or tested before purchase, so potential tourists often rely on recommendations by previous buyers. The better the experience an individual has had with a packaged holiday, the more likely she is to return and to recommend the trip to others. This increases the potential of tour sales in the future, which implies that a tour operator's reputation in the industry and the market place is commercially significant.

5.3 Marketing Strategies

For the package tour operator, it is fortunate that while images may consist of many component parts, they tend to be perceived, experienced and remembered by the tourist as holistic entities (Schreyer & Beaulieu 1986:234). This is important to tour operators who sell vacations as entities; the image - or dream - is packaged into a whole, to be marketed as a single basket-full of leisure experience.

The package tour operator has been described as the only true "manufacturer and marketer of a genuine tourist product" (Burkart & Medlik 1974:214). This is true in the sense that tourism is a composite of many parts which operators alone combine and sell as a whole experience. Marketing tourism is unlike other consumer goods in that it supplies a number of future services to a customer rather than a distinct product. This means that in the case of tourism the marketing concept must include the special feature of coordinating the policies and services of several components or organizations in the system.

Marketing has been defined as...

> ...the discipline of applying a microscope to the end-user of a product in order to establish his or her needs and wants, and then shaping a product, and sales and advertising strategy to meet those needs (Fitzgibbon 1987:489).

In general, travel marketing can be categorized as either consumer-oriented or destination-oriented, although the two are not as distinct as they may seem and are often used in combination. Consumer-oriented advertising most closely fits into the process of meaning transfer as outlined by McCracken: it aims to promote the package as one made to order to suit the needs and wants of the individual Canadian tourist. This type of customer oriented advertising stems from the intuitive logic of the marketing concept widely adopted by the tourist industry (Haywood 1988:4).

The need to offer a greater variety of packages to satisfy an increasingly diverse travel market is part of the rapid and unanticipated upheaval experienced by the tourism industry within the past few years. The deregulation of airlines, the increasing level of competition and supply of facilities in excess of demand, new information technologies, and social changes giving rise to new patterns of demand, have made the marketing concept difficult to operationalize (Haywood 1988). Travel product choice has become too vast for the consumer to reasonably manage on his own.

The tourism product is an amalgam of information, goods and services whose entirety no single organization can control. For the marketer, it is difficult to identify because each traveller varies in their purpose for travel

and in their objectives to be achieved. However, by packaging this amalgam, tour operators strengthen their control over the product and reduce the choices open to the travel consumer.

Several mainstream tour operators place price-oriented marketing first and foremost. Due to standardization of product and image, major wholesalers depend upon competitive pricing to make or break high-volume sales. Price-oriented advertising is consumer-oriented in that it targets a diversity of price-conscious and alert consumers. Most major operators employ this marketing strategy and package a range of budget to deluxe holidays in each destination area in order to cater to all income-sectors of the Canadian travel market.

The two strategies - consumer and destination marketing - become confused when one considers that it is the attractiveness - the sun and the sand - of a destination that satisfies the desires of the winter-bound Canadian. As one informant put it, destination/consumer-oriented selling amounts to the same thing: 'selling a destination's attributes to the consumer's needs.' This view stems from a belief in the marketing benefits of standardization, as was, in fact, expressed by the president of the largest tour company in the sample.

To create a package amenable to the techniques of marketing that aim for a high level of impact, tour operators have, in varying degrees, standardized the product. This is possible because the features which most substantially influence the tourist's buying decision can be reduced to such things as attractive hotel and sunny climate. The actual location is of secondary importance. Thus, marketing each destination separately is unnecessary and a great number of tours can be branded and standardized to appeal to a large market of interested buyers.

However, in view that aside from price, it is really image that competes for greater shares of the market the standardization of the holiday image is problematic. If the vacation images look alike and are composed of nearly identical features, to what can one attribute their success in a competitive market place? One hypothesis is that the standard image of sun, sea and sand is powerful enough in itself to lure and meet a demand sufficient to keep several large tour operators financially in the black. This hypothesis is significant to the later discussion of a lack of concern tour operators express regarding market research.

Some critics argue that this process of standardizing services across the globe has resulted in "a homogenization of culture designed to obliterate any distinctive features of place or community" (Haywood

1988:5). Standardization has not always been successful and may, in some cases, backfire. This may particularly be true with regard to the expectations of a maturing Canadian travel public.

Destination-oriented advertising represents a lesser degree of standardization than consumer-oriented marketing. Destination promotion emphasizes the beauty and attractions of a particular region; it is used by operators to introduce a relatively unknown destination to the Canadian market. Adventure tour operators primarily market the destination: emphasis upon environmental uniqueness or cultural distinctiveness is used to lure a more narrowly defined travel market. Packages that involve cycling or hiking promote the holiday as an extension of the tourist's active lifestyle in North America. This strategy may well come to greater use as more tourists look for customization and personalization of service. For these consumers, much of the satisfaction derived from foreign travel and unique tourist experiences is based not on standardization but on complexity, novelty and diversity (Haywood 1988:6).

5.4 Tendencies in the Canadian Travel Market

Tour operators have had to direct their marketing strategies toward changing tendencies in the Canadian travel market. One of these is the extreme value-conscious

attitudes Canadians have developed toward travel. Ironically, this is coupled with a growing demand for short getaways and for more than one holiday per year. These two tendencies are discussed separately below.

5.4.1 Value-Consciousness

'Canadians are very cheap travellers.' Interviews repeatedly called attention to this aspect of the Canadian character. Where Americans are favoured because they spend a lot more money at the destination, Canadians are reputed to squabble over five or ten cents. Despite their welcome reception at most overseas destinations, waiters and chambermaids complain that Canadians do not tip, causing many operators to include gratuities in the package price. Seemingly more extreme now than in the past, the Canadian price and value-conscious travel mentality may partially relate to fluctuations in exchange rates. However, it appears to go beyond such external factors.

Astute consumerism is part of everyday Canadian life where price watching is directed at all products ranging from cars to groceries. A Canadian tourist in the market for travel is characteristically known first to question what value he will get for his dollar. This attitude prevails across the age and income spectrum, from the student on a tight budget, to the professional two-income yuppie couple,

to the retiree living off life savings and pension cheques. Unfortunately for the travel industry, value for dollar has come to mean the expectation of high quality standards at a low price.

The story of the frugal Canadian tourist is, however, two-sided: he is as value conscious as he is because the travel industry has in part taught him to be. Package tour operators bemoan the fact that they have 'shot themselves in the foot' by spoiling the market with over-allotments of air seats, price wars, and last minute sell-offs. In 1981, for example, travel market growth slowed in association with an economic recession. Over-capacity and an increase in the number of wholesalers and operators resulted in a 'package war.' This was illustrated by bigger and more numerous winter advertisements and a trend toward last-minute bookings and bargain deals (Financial Post February 21, 1981:14). Consumers quickly tuned into the over-capacity in the market: "They know there are bargains for those not fussy about where they go and who can go on the spur of the moment" (Financial Post December 11, 1982:11). In 1982 low-end packages 'sold like hot-cakes.' All-inclusive packages with no tipping and free cigarettes also did well that season.

Again, when 1985-86 proved to be an exceptional travel season, all tour operators increased their capacity

unsuspecting of the 'Black Monday' money market crash in October, 1987. The flooded travel market resulted in more sell-offs than ever before plus several major bankruptcies. The consequence has been a 'wait-until-the-last-minute' travel market. The hesitancy to book in advance makes planning ahead difficult for the tour operator. Further, operators are reluctant to raise package prices despite yearly inflation. In some cases,the 1988-89 season prices can still compete with of 1981-83.

Package tour operators are beginning to combat this trend by offering early-bird specials to encourage clients to book in advance. Many claim to refuse to continue selling off at the last minute. The realization that constant discounting spoils rather than upgrades the market, and that in the end one must pay for what one gets, is beginning to imprint its mark on both the wholesaler and the consumer. Tourists previously burnt by bankruptcies and misled by advertisements, may tend to shop around more carefully and make quality and reliability their first priorities and the dollar second.

Nevertheless, the truth remains that the benefit offered by package tour operators boils down to price. Volume buying allows budget travel prices suitable to a value-conscious tourist. Canadians continue to set aside

their individualistic demands for a customized vacation in exchange for a more economical standardized holiday.

5.4.2 Multiple Vacations and Getaways

The average number of vacation trips taken by Canadians has trended upward over the years. Tourism Canada (1985) reports that vacation travellers took an average of two trips in 1984 compared to one and a half in 1970 and only one in 1966. In 1984, almost two out of ten travellers (19%) took three or more pleasure trips away from home. In 1987, a third of Canadians' overseas trips were of a one-to-two week duration, marking the first year that trips overseas lasting three weeks or more were not in first place (Statistics Canada 1988a:xxiii).

Similar to the desire for more than one television or the need for two, perhaps three telephones in the house, Canadians are asking for a short getaway in addition to their major two or three week vacations. For some, this getaway is a one-week or weekender to the south in the middle of winter, while others take advantage of the summer values as a cheap second holiday. The boom in short-break vacations has come into being partly because of the growing number of dual-income families who find it difficult to make joint plans for a prolonged vacation (Royal Bank Reporter 1988). Low-cost airfares continue to fuel this boom.

Increases in return-patron and overall package sales indicate a definite increase in the number of times per year Canadians travel. Tour operators attribute this to both increased vacation time per year among Canadian workers and to a buoyant economy. Ironically, incidents like 1987's 'Black Monday' encourage the public to spend some of their earnings instead of keeping it locked in investments: it fosters a 'live for now' mentality. Impulse travel - the decision to go on a holiday today and book it tomorrow - is increasingly popular among Canadians. Three and four night getaways provide a special attraction to young professional workaholics in need of a short respite from a stressful office situation or a precious escape from highly competitive positions that do not allow for a long vacation getaway.

Mainstream tour operators report a growing number of summer package sales to the south, despite the 'myth' of Canadians refusing to leave their home warm season. Ontario cottage country holds no guarantee of good weather nor does the weekly price of flying to Jamaica differ much from renting a cottage on Georgian Bay. From a marketing standpoint, the tour operation industry has taken note of this high level of multiple trip-taking and no longer advertise 'the annual vacation,' which is becoming more and more of a rarity.

In part the increase in more than one trip per year is the result of the last minute situation the industry has helped to create through sell-offs in the Canadian marketplace. Holidaying three and four times a year is as much a reflection of what is available as of any need for Canadians to get away more often. Tour operators have both responded to and cultivated this trend with package ideas to entice the consumer. The market for secondary trips is now almost as large as it is for the primary vacation. Future watchers foresee mini-vacations as an integral feature in Canadian travel patterns (Royal Bank Reporter 1988).

5.5 The Lack of Marketing Research

The bottom line of any tour operation is its financial success. To be a successful broker in the travel business, a tour operator must have access to and the ability to manipulate information about the market segments they are trying to reach. In Goffman's terms, this parallels "audience segregation" wherein the tour operator becomes a performer trying to give the impression there is something special and unique about his product (1959:49). They need to directly manipulate the impression they give to others. Ultimately, tour operators, like Goffman's performers are concerned with maintaining an impression of living up to the many standards by which they and their products are judged.

Success in the travel business is heavily dependent upon a good reputation of standards and quality. Rising revenue figures would seem to indicate overall success of the tour packaging industry (See Table 5.A). However, as individual competitors in the industry, operators' strategies for reputation and survival involve seemingly weak methods of 'knowing their audience.'

TABLE 5.A Number of Firms and Total Revenues of Tour Wholesalers and Operators by Revenue Size Group 1983-1985.

# of Firms	1983	1984	1985
Total	**401**	**449**	**458**
<$250,000	189	219	216
>$250,000	212	230	242
Revenues $'000,000			
Total	**1273.8**	**1573.4**	**1745.3**
<$250,000	23.6	21.6	21.0
>$250,000	1250.2	1551.7	1724.3

Source: Statistics Canada 1988b

Basically, two avenues of market research are open to the tour operator; one is the hiring of professionals external to the company, the other utilizes internal staff to gather and study client evaluations. Market research is defined as;

> the systematic collection of information relating to the supply of and demand for a product or a proposed product, in such a way that the information may be used by the organization to formulate informed decisions

> about its policies and its objectives (Burkart & Medlik 1974:200).

Virtually all tour operators interviewed agreed that consumer input is important; some system of internal evaluations - such as a question sheet administered on the return charter flight - was either being used or in the process of being implemented. The intent is to gather feedback from individuals returning home from a package holiday to determine the overall level of satisfaction, to screen and rectify complaints, and to direct changes in itinerary and creative design of the package. It is an extremely versatile tool the tour headquarters can use to scrutinize standards and personnel in the destination region and to maintain on-the-spot contact with the Canadian travel market. These evaluations attempt to incorporate the nature of the fit between expectation and experience. As one company president put it, evaluations help to put the tour operator 'into the traveller's shoes' and to discover things like 'you can't send a woman on a 15 day (escorted) tour without at least half a day to shop!'

Any tour operator who organizes packages and conducts tours has a Canadian representative based at the destination end to make sure everything is ready for the tour members, to brief the guests on such things as local standards and cultural customs, to advise and counsel the tourists on activities available, to field questions and

complaints, and to handle emergencies. As mediators between the host culture and the guest culture, these representatives play their own important brokerage role in the tourism process. They are the most direct link between the package tour operator in Canada and the personnel in destination regions. The weekly reports that each representative sends back to the Canadian headquarters are invaluable sources of information and evaluation.

Very few package tour operators use external market analysis, surveys, or statistics. Identifying and matching markets to tourist products or destinations is not easy and it is often left to chance (Haywood 1988). Most tour operators lack the time, money and capability to research markets. In Canada, the tourist markets are widely dispersed and difficult to segment.

Professional marketing research is expensive and thus excludes the smaller operators whose budget cannot absorb the cost and whose market target is likely too small and inaccessible for any realistic assessment to be made. Those large operators who have hired the services of travel market researchers have found focus group surveys - travel agents and leisure travellers - of greatest use. Two large operators interviewed sponsored passenger profile surveys that were conducted at the international airport by college students enrolled in tourism and hospitality programs.

Results proved, in fact, to be of some significance. One study revealed a higher than expected number of upscale passengers cashing in on bargain air-only charter tickets and then buying their own upscale product once they arrived at the destination. The tour operator concerned has since introduced an upscale package to appeal to those passengers already on their flights.

Generally however, research results merely confirm or reinforce what the operator already knew about his market target and about how he stands vis-a-vis his competition. Partly due to the volatility of tourist markets, research that is done tends to focus on improving short-term efficiency. As a result, many tourist firms display a conservative tendency to stick with tried and true destinations and to follow a traditional strategic focus or proven corporate strength.

The interview data indicates a wholesale travel industry with a tendency to make entrepreneurial decisions by 'gut feeling.' Experienced presidents, directors and managerial staff are counted on to intuitively know what is 'hot' and what is not. Interviews revealed a common concern among these entrepreneurs to impress the market with their uniqueness, Ironically, they remain unaware of just how routinized their marketing performance really is.

Considering the importance of impression management, it is astonishing that tour operators possess so little concern over the use of external market research. Access to accurate information on the changing travel audience would make him better able to match his performance to these changes. In view of the recent trend toward greater segmentation in the market place - illustrated by a decreasing popularity of large department-type stores and an increase in small boutiques in mall settings - the conservative attitude held by tour operators towards market research may quickly become a regrettable tendency. If supermarkets are daily using bar-codes to gather information on product sales and consumer preferences, how is it that tour operators are able to survive in a highly competitive industry with such a low-sophistication level of market testing? As hypothesized earlier, perhaps this internal contradiction is resolved by the idea that tour operators do not compete in terms of their actual product, but rather in terms of image.

The argument follows that given the intangible nature of dream-vacations, tour operators find it unnecessary to concretize them via market research. This implies that the perception of travel - as a packaged dream - has a power of its own to compel Canadians to buy those packages. Thus, while a lack of market research is anomalous

for such a large industry in the present-day Canadian consumer context, it is consistent with the type of commodity they are selling.

CHAPTER 6

TOURISM: A CULTURALLY CONSTITUTED CONSUMER GOOD

The function of package tour operators as marketers and brokers is rooted in the tourist exodus phenomenon exhibited in certain generating regions. The principal generators of world tourism continue to be the Western industrialized countries where economic growth and a rising standard of living are declared political and social goals. Accordingly, a conscious emphasis is given to consumption. Prominent among the consumer services is tourism, particularly holiday tourism.

This chapter concentrates on the demand aspect of the tourism process as characterized by the Canadian travel market. The market is considered a cultural unit whose shared motivations, expectations and preconceptions inevitably affect travel experience. The chapter begins by outlining the North American cultural categories and principles by which Canadian society is defined and in which touristic symbolism is constituted. Second, it relates the meaning of travel as a consumer good and as a bridge to certain Canadian ideals. The focus is upon how Canadians come to define a dream vacation and how in turn package tour

operators manipulate culturally constituted symbols in their effort to create and market travel 'dreams'.

6.1 Canadian Society and North American Culture

Culture is both the 'lens' through which all phenomena are seen and the 'blueprint' of human activity. This conceptualization of culture (McCracken 1988) is useful in that, as a lens, it focusses upon how and why Canadians see the world of travel the way they do; as a blueprint, it demonstrates how this world is fashioned and packaged by the human effort of tour operators.

McCracken's concept of culture is aimed directly at the analysis of consumer goods; the original meaning of goods is located in the "culturally constituted world" (McCracken 1988:72). The fundamental co-ordinates of meaning are cultural categories - basic distinctions and divisions of, for example, time and space. In North American culture these categories include distinctions between leisure and work time, and categories of space for occasions of home and holiday. Cultural categories also distinguish between the members of our society according to class, status, age, and occupation. In this way Canadian culture establishes its own special vision of the world. Schreyer & Beaulieu add that people structure entities in the world in a manner most functional in terms of interpreting and responding to, for

example, holiday-type or destination (1986:235). The categories Canadians create are characterized by the attributes which are most relevant to them with regard to leisure activity.

Cultural meaning also resides in cultural principles - the ideas or values according to which cultural phenomena are organized, evaluated, and construed (McCracken 1988:76). When a consumer good such as travel distinguishes between two cultural categories such as leisure and work time, it does so by encoding something of the principle according to which these categories are associated. Travel, for example, communicates the supposed 'success' of the one able to go and 'failure' of the one who must stay home, the upper-class as 'world-wise' and the working-class as 'parochial.'

One characteristic of cultural categories in modern North America is their apparent 'elective quality' (Ibid.:73). Devoted to the freedom of the individual, our society permits its members to declare at their discretion the cultural categories to which they presently belong. Through travel, members of the working class may declare themselves middle class, the old may declare themselves young and so on.

For example, interviews with tour operators affirmed that marketers in Canada are dealing with a self-motivated "ME" mentality. This is reflected in the rapidly growing

percentage of the adventure travel market in Canada. Whereas 20-30 years ago it was not within the expected social lifestyle of grandmothers to go hiking or housewives to ride camels, today anyone may travel in new and unusual ways. A Seniors' operator reported that women especially have become more adventurous than in the past. Over the past two decades more and more women have acquired their own source of outside income, and widows and divorcees have been socially encouraged to stand on their own two feet, to feel free to go and 'do their own thing.'

Cultural principles have the same changeable, elective quality as cultural categories. Principles such as 'hedonism' fall into disrepute in one decade only to be replaced by 'expediency' in the next. The interpretation of what constitutes a dream-holiday changes over time; definitions of the search for happiness and paradise vary in accordance with a changing cultural frame of reference. This can be illustrated in the 1960's and 70's campaign of a well-known international club-style operation promoted within a North American cultural context of free love and anti-establishment mentality. It offered young Americans the opportunity to express hedonism in opposition to a puritanical, work-ethic status quo. In the 1980's decade this company redirected their campaign to complement a context of economic recession and diminished security:

interpretations of paradise shifted and now promotes the attitude of 'live for now, later will come soon enough.'

6.2 Tourism as a Consumer Good

The idea that in industrial societies people have become increasingly interdependent through the things they produce has been commonplace since the time of Karl Marx. This idea implies that social relations are created through the things that people consume, commodities which function as signs of social status (MacCannell 1976:21).

As a commodity, tourism is a production of signs that have been integrated into the Canadian cultural 'lifestyle code' (cf. Thurot & Thurot 1983). This code enables an individual to relay messages of identification with a given group. This individual may, for example, consume travel and leisure goods as one technique to demonstrate a particular, perhaps superior, lifestyle. By virtue of its intrinsic diversity and intangibility, travel is a commodity with enormous capacity for personalization. Thus, tourism defined as a consumer good is given a significance beyond its utilitarian character and leisure value.

Tourism, as travel, is also concerned with the cultivation of hopes and ideals that are otherwise beyond one's grasp. McCracken's concept of "displaced meaning"

illustrates how consumer goods bridge the gap between the real and the ideal in social life (1988:105). In dealing with what is real, a culture or an individual may displace its ideals. By removing them from daily life and transporting them to another cultural universe, ideals are both sheltered and made into practicable realities.

Ideals can be removed to an almost infinite number of locations on the continua of time and place. On the continuum of time, this may include dreams of a future in paradise. The discourse of advertising in tour brochures is illustrative here: worded in the future-tense, brochures describe what is in store for the potential tourist dissatisfied with home and photographs invite him to step into paradise. As a refuge for displaced meaning, the future is accommodating and unconstrained; its limitation is only the imagination that contemplates it. However, the kind of future that will prove a satisfactory location for ideals is partially specified by cultural and social convention.

It is also possible to transport one's ideals across the continuum of space. Individuals are constantly engaged in the study of the lifestyles of others for proof that their personal ideals can be realized. Reminders of the 'lazy pace of life' and the 'carefree existence' on far-away tropical islands are frequent elements of travel advertisements. They have a persuasive effect on individuals

and groups in unhappy situations through the judicious displacement of certain hopes and ideals.

In sum, when ideals have been removed to new locations in time and space, goods can serve as bridges to them. Following is a discussion of how travel acts as a bridge of escape from everyday life, or as a bridge to new social status and to unfulfilled goals. Travel as a good also enables individuals and groups to recover displaced meaning without bringing it fully into the demanding circumstances of the here and now. This is because vacations exist uniquely outside of everyday social space and time, giving it a transparent quality not held by most other durable goods.

6.2.1 Escape

The role of goods in the recovery of displaced meaning has a part to play in what McCracken considers a systematic property of consumption, "escapism" (Ibid.). The annual phenomenon migration to sun destinations indicates that thousands of Canadians perceive long, cold winters as something to be survived by escape to the south. The dream of perfect beaches and endless warm sunshine is a form of therapy shared by a cultural group for whom the January blues are very real.

According to the majority of mainstream tour operators interviewed, the chief holiday symbol held by Canadians is, without doubt, a sunsoaked beach. The sun and the beach are basic to mass-tourist holidays, placing everything else - cultural, educational, historic aspects- second. These vacations of the '4-S' type (sun, sea, sex, sand) are characteristically escape-motivated holidays or 'getting away.'

The separation of work and leisure has helped to define vacation as escape. Schreyer & Beaulieu point out that cultural categorization, say of work and leisure environments, is a strategy people use for keeping images organized when they are involved in vacation planning (1986:234). A person who decides to 'get away from it all'- the home environment - must be able to anticipate her behaviour in the possible other environment - the holiday destination. Thus the link between behaviour and environment - between escape and island resort - is interpreted through the assumption that potential tourists categorize vacation images according to, and in opposition to, their cultural categories of everyday life. In Canada, tourists who link escape behaviour to the enclave of a resort environment comprise the second largest (22%) activities and interests based segments of the market (CTAMS 1983).[1]

This social cycle of work and leisure, home and holiday is, in Turner's terms, "a type of dialectical process that involves successive experience of...communitas and structure, homogeneity and differentiation...(1969:97). What is certain, Turner adds, is that no society can function adequately without this dialectic (Ibid.:107). Thus as an escape into liminality, a time and place of withdrawal from normal modes of social behaviour and action, tourism possesses a significant social value. As a consumer good, this value is translated into a commodity with cultural meaning. For example, the growing popularity of insular club-style holidays suggest that more people are interested in getting out of their Canadian environment - and into liminality - than they are in going to something different.

The expectation of "spontaneous communitas" as typified by Turner (1969) may be an important element of the Canadian tourist experience. Wagner (1977) uses the concept of communitas to describe how people normally subordinate to or enslaved by social structural bonds then become masters of their own social behaviour when these bonds disappear during a holiday in a different setting. Wagner surmises that on the psychological and existential level this structureless living during the holiday is of great importance as it may liberate the individual from the stresses and pains imposed by the formal structure of one's

own society. He is given a chance to recuperate and to recharge the inner being, in preparation of return to the order and regularity of everyday life. As an avenue of social escape, travel is thus seen as a symbolic source of healing and renewed vitality.

This is the apparent concept underlying one club-style tour package which promotes the 'magic' inherent in 'the intangibles of warmth, camaraderie, and peace of mind in an environment radically different from everyday life, where...all of life's unpleasantries (traffic jams, work deadlines, school schedules, money) are set aside...an experience of total relaxation in a setting of unsurpassed beauty.' Sun holiday packagers market rejuvenation of body and mind. Convinced that vacations of the type they offer have become a necessity in today's world where people cannot face stress day after day without taking time off to decompress, they package an 'antidote to civilization.'

A similar concept, that of 'endless vacation,' may underlay the trend toward time-share holiday condominiums whereby individuals make a permanent investment into their leisure lifestyle. However, in this instance communitas is characterized more by its 'normative' nature influenced by time; spontaneous communitas has been prolonged and has become increasingly organized, structured, and preplanned.

In addition to the felt need for escape from a busy urban life, an individual may also wish to escape from feelings of boredom and loneliness. Many tour operators interviewed expressed the opinion that people feel something missing in city life; they want to get to know others and to participate in a community, to feel 'I belong.' Club-style holidays promote such a 'village feeling.' A tour operator specializing in the 18-35 age group believes that selling the people, party, and a bit of the sex idea is important to the singles crowd to whom the whole idea of fun is the potential of meeting others. Wagner points out that the tourist setting is conducive to interaction; informal and fluid, smaller groups are formed for different activities and, apart from personal inclinations, they are based more on being in a structureless condition than on any other criteria (1977:42-43).

6.2.2 Social Status

Goods as tokens in the status game has been an integral element of consumerism since its revolutionary beginnings during the 18th Century (McCracken 1988:17). The history of consumerism records how low-standing individuals could now imitate and counterfeit high standing without fear of detection. The advent of mass tourism in the 19th and 20th centuries erased the 'Grand Tour' as a means for

separating and maintaining the boundaries of nobility from "more common folk" (Turner & Ash 1975:33). Nevertheless, touring has maintained a degree of its status significance.

Today, travel is a socially fashionable pursuit. The number of places one has visited, the frequency of trip taking, the distance travelled, and how exotic the destination is judged to be, possess a combined power to impress one's peers. Although travel vacations are now part of the status quo, travel continues to retain a special allure. In a recent study, "travel for pleasure" received top choice of Canadian consumers asked to specify which of 22 items they associated with "success and accomplishment" (Royal Bank Reporter 1988:3). Travel continues to be a marker of class, status, and lifestyle.

Several informants stressed the significance of peer pressure upon potential buyers as an important element of package sales. Travel has become a common topic of conversation which, as one operator put it, if listened to repeatedly has the 'subliminal' message of 'the thing that you must do.' An adventure tour operator attributes part of his success to 'peer pressure as a strong motivating factor for people to take upscale adventure trips.' In terms of motivation, Schreyer, et.al.(1984:41-2) report that individuals with no previous experience in trip-taking, scored highest in wanting 'to show others I can do it.'[2]

Status conscious people will take the Orient Express as much to impress others as for the adventure of the trip. This idea was reiterated by operators selling sun destination packages: returning to Toronto in February with a suntan is like wearing designer clothes bought at Holt Renfrew or like driving a Porsche. The suntan is a status symbol that tells fellow Canadians you have achieved a level of success that affords both time and money.

Ironically, the upscale adventure tour is said also to act as a 'great equalizer': when facing a steep hill on a bicycle, it does not matter who or what you are. Wagner states that the "tourist life" context does indeed play down status differentiations (1977:42). Tourists attempt to find a common ground for interaction, and temporarily suspend the status differences inherent in their differing financial, educational, and professional standing at home.

However, while it may be true a tourist is able to leave the social demands of everyday life behind, a constant struggle for position may also be going on among a group of tourists (Hanefors & Larsson 1988:15). When a tourist leaves home, his cultural baggage accompanies him; it is always present and affecting his way of behaving. In this sense, the tourist makes a trip on the margins of his own culture, although he may be trying to experience its extreme borders.

The will to succeed is also a strong motivating factor, one which is woven tightly into the Canadian social fabric. Individuals can relate vacation travel to their personal success as an award for work well done; corporate travel incentives and rewards are a part of this same psyche. Sports programs at club-style resorts market 'the thrill of victory: mastering those balmy tradewinds and staying upright on a windsurf board... and victory means not having to spend an arm and a leg doing it.' Unlike material acquisitions such as a new television or microwave oven, a week on Paradise Island is the making of a dream come true. However, the material objects of travel - souvenirs and photographs, for example - are important means of substantiating an otherwise intangible category of cultural meaning. They contribute to the construction of a vital, visible record of an individual's social attainment. Travel can be an extremely personalized reward that says, 'I deserve this,' and at the same time be a boost to one's social self-image.

In summary, the social, cultural, and environmental context shared by Canadians, influences why and how they consume travel. Travel has come to signify an escape from a harsh climate and has taken on a peculiar symbolic status in the social realm. Tour operators are culture brokers who

have been able to interrelate Canadian ideas, values and orientations to create meaningful 'dream vacations'. Like brokers in other contexts, they are both a consequence and often a cause of social and cultural change (Rodman & Counts 1982:1).

NOTES TO CHAPTER 6

1 Demographically the resort segment tends to consist of working couples under the age of 35 with a household income that exceeds $35,000 per year.

2 On the other hand, those individuals with a high level of previous trip-taking expressed 'a sense of achievement, self worth, or personal meaning from the activity.' The disparity of these same motives among the inexperienced group suggests a very different orientation to the needs fulfilled by travel (Schreyer, et.al. 1984:42).

CHAPTER 7

THE TOUR OPERATOR AND THE TRAVEL MARKET: INTERACTION AND TRANSFORMATION

Chapters four and five look at how Canadian tour operators perform as intermediaries, innovators, and communicators within the tourism process. Chapter six defines tourism as a culturally constituted good which derives its meaning from those Canadian tourists who consume that good. As two components of the larger system, Canadian tour operators and the travel market interact with and respond to changes occurring in the other. Thus, Mill and Morrison liken tourism to "a spider's web - touch one part of it and reverberations will be felt throughout" (1985:xix).

Both the Canadian travel market and the package tour industry have experienced dramatic changes in the past forty years. This chapter discusses two recent changes, manifested in the seasoned nature of Canadian tourists and in a polarization of specialty and mainstream tour operators. Each is a partial result of the interactive relationship between the tourist and the operator.

7.1 Canadians as Seasoned Travellers

As Canadians have become increasingly educated about travel, the market has become more demanding of quality and uniqueness. While there remains a significant percentage of tourists with a 'gotta go south during the winter' and 'if you shout loud enough in English you can make anyone understand' mentality, tour operators agree that, in general, Canadians have progressed much beyond that stage. A new generation of young Canadians has grown up familiar with the notion of travel. Increased enrollment in university and college, media exposure, and communication with experienced parents and peers, and interaction with immigrant groups in a multicultural society all work to diminish the feeling of venturing into the unknown.

An informed travel consumer not only shops around for the best deal, but also insists on knowing more about where he is going. Adventure companies describe their clients as self-informed, self-counselled consumers who have read the relevant brochures, guides, and perhaps even library material on their chosen destination before even approaching the travel agent. This pre-trip research has made consumers more demanding in the type and quality of holiday they want. For instance, there appears to be a trend to spend more quality time in one place as opposed to 'it's Tuesday so this must be Belgium' type of trip. Furthermore,

the growing popularity of packages that combine the sun and beach with day-tours to archaeological ruins and the like, may reflect the greater importance Canadians are placing on the educational aspect of their holiday. The more widely read and the more seasoned travellers are, the more sophisticated their process of trip selection and the greater their expectations.

Schreyer, et.al.(1984) discuss the influence of past experience upon one's selection process and expectations regarding leisure activities.[1] They argue that previous participation in an activity contributes evaluative information to the individual in the form of accumulated knowledge. The amount and type of information a person has concerning an activity may affect the selection of that activity to fulfil certain needs. Thus, a first-time traveller may choose a tour package based upon a more restricted set of information than a person with an extensive history of tour package use. Potential tourists with a greater travel experience are likely to have a more specific conception of the rewards available, while first-timers may be responding to more generalized images promoted by commercial entrepreneurs and/or the media. Tourists with varying degrees of experience may differ significantly in the type of trip they book, the relative importance of various motives for buying a particular package tour, and

the subjective evaluation of their satisfaction with the tour.

In addition to the amount of experience, the degree of involvement or commitment to an activity will likely affect trip-selection (Schreyer & Beaulieu 1986). This involvement is described primarily in terms of specialization, wherein a 'process of leisure socialization' will tend to lead tourists into more exacting levels of tourism. "Persons higher in experience and commitment tend to be more specific in the attributes they identify, and identify more attributes as being important in the decision process" (Ibid.:244).

Tourist expectations that include seeing something different are further stimulated by the media: movies, documentaries, and exhibitions have brought unknown places of interest to public attention. An operator who sells tours to New Zealand and Australia believes that the latter country's profile has been heightened worldwide since their televised win of the America's cup, radio exposure of their rock music groups, and most dramatically since the "Crocodile Dundee" movies and accompanying Paul Hogan promotional campaign in North America. Eventually this exposure is transmitted to the international travel market as a seed of desire to go 'downunder', and to the travel industry as a ripe opportunity for packaging new tours. An

operator specializing in tours to Africa ascribes movies such as "Out of Africa" with having done more for tourism in Kenya and Tanzania than any tourist board could have done with the same amount of time or money. Safari package sales have benefitted greatly since Africa became a trendy place to go: seat space into Kenya, especially during the summer months, is now difficult to obtain. Another tour operator said that the King Tut exhibition that toured North America several years back played a significant role in making Egypt a popular destination. Mass media apparently have opened the minds of Canadians to think in more international terms and have tantalized their appetites to see more of the world.

7.2 Polarization of the Tour Industry

With the growing clamour among sophisticated Canadian travellers to experience unpredictable, sometimes strenuous vacation, there has been a proliferation of travel firms promising adventure vacations that will fulfil those desires (Jones 1988). In the past 10 to 15 years an overall increase in the number of franchised wholesale tour operators has occurred throughout Canada (Refer to Table 5.A). In the past six years, both large and small tour operations have increased in number at an equal rate of 12.5% (Statistics Canada 1988b). Packagers of small,

specialized tours have always existed in the industry, catering to a more exclusive segment of travel market and thus keeping a low profile as far as the general public was concerned. It is the tremendous growth of the mass-market operators who cater to the huge remainder of potential Canadian travellers that constitutes a new travel industry phenomenon that began post-World War II.

There exists a fundamental instability in the tour operator industry. A history of high levels of turnover in the package tour industry has caused problems for both retail agencies and consumers in the past (Sheldon 1986). Experienced agents tend to rely on a few major tour operators who have proven to be dependable. This has led to a polarization in the industry of a few large, stable firms apart from many smaller, more vulnerable operators. In Canada, 13 major operators have banded together to establish CATO - Canadian Association of Tour Operators. The association is somewhat exclusive, admitting into membership only stable, large volume operations, in an effort to professionalize the industry, promote ethical standards of advertizing, and cooperatively fight what they view as infringing government regulation.

A major reason for this polarization is that volume is critical for the tour operator to gain good discounts from suppliers and thereby be more price competitive. For

those firms which are not able to generate volume, one way to stay in business is to capitalize on some specialized knowledge. A specialized factor is one that cannot be easily duplicated; these may include the knowledge of specific destinations, their facilities, and attractions, or the knowledge and ability to create special interest tours such as historic, adventure, or archaeological tours. Tour specialists owe their success, in part, to a maturation of travel tastes in the Canadian market.

Most informants choose to think that the polarization of mainstream from specialized tour operations displays ambivalence in both direction and cause: it is a reflection of Canadian consumer experience and demand as well as the creation of an industry that is looking for new avenues to promote. The scramble to reach new markets is evident in brochures which offer a broader spectrum of tours each year in the attempt to provide something for everyone.

In one sense there is a coming together of the polarities of tour packagers, while at the same time a continuing struggle to maintain separate identities. Hiking, cycling, and safari-type companies offer the average Canadian a 'soft-adventure' which romanticize physical endeavour, deprivation of creature comforts, and 'going native.' Mainstream companies offer what have been described as 'adventure holidays' - a combination sun and Maya

archaeology tour in Mexico, for example. From the viewpoint of the consumer, the polarization of the industry into a few larger well-established firms catering to the mainstream, and many smaller less-stable firms catering to a growing special interest travel market, may be the optimum distribution for the tour industry.

7.3 New Directions: Adventure Travel

Increasingly urban Canadians sense that maybe human existence is more than just "getting and spending" (Jones 1988:33). When it comes to vacations, such tourists have tired of buying an all-inclusive trip to a no-surprises beach resort. Instead, they are in the market for a quest that promises a new lease on life.

Venturing off the beaten tourist track is one of the fastest-growing segments of the Canadian travel market. Tour operators specializing in exotic locations are mushrooming as more and more intrepid travellers seek new and offbeat adventures. As indicated, the average Canadian who becomes more experienced in travel, also becomes more sophisticated with regard to travel demands. Many tourists are looking for customization and personalization of service. The Canadian public is acquiring a taste for something different from the conventional sun-holiday, a trend reflected both in the

increase of specialty tour operators and in the movement of mainstream operators towards more specialized packages.

A tenuous correlation may exist between the adventure travel trend and the multicultural backdrop against which urban Canadians live and work. Several mainstream tour operators expressed the opinion that Canada's immigrant heritage and multicultural policy corresponds with a character of flexibility, tolerance and diversity of interests among Canadian travellers. According to most package tour operators interviewed, the Canadian mass tourist is increasingly willing to visit new destinations. Contact with a different culture and language - at a Latin American or French-speaking destination, for example - is an anticipated aspect of the flavour and richness of a foreign holiday. However, among package tour operators the claim that the multicultural Canadian is characteristically venturesome is as disputable as it is supportable. Although clients of adventure tour companies tend to show interest in cultural contact and contrast, mass tourists generally are not.2

The rise of adventure travel and seemingly the adventurous spirit of Canadian tourists that has accompanied and/or created it corresponds with the growth in the overall travel market. Interest in alternate forms of travel has grown in part out of the hippie movement in the 1950's and

60's when young people donned backpacks, rode local modes of transportation, and forsook 5-star hotels for living the way local people lived. Some segment of the travel market has always searched for 'foreignness' and this segment is now developing. However, its notable growth may be due more to the number of specialty holidays that opportunistic tour operators now offer and promote to the general public. While the sun and the sand crowd maintains and replenishes itself, tour operators, mainstream and specialty alike, agree that to fulfil the need of 'I want to do something different,' is a driving force behind new itineraries, new activities, new destinations, and new marketing strategies.

7.3.1 Romanticized Primitivism: Paradise Revisited

A well-known anthropological concept is that to know ourselves culturally we must see ourselves in contrast with another culture. It also appears true that societies tend to favour their structural opposites when searching for the perfect 'other' in a new location (McCracken 1988:107). Industrial societies tend toward a certain fondness for pastoral societies, modern societies admire traditional ones. Turner would typify this as a form of "ideological communitas" (1973:194). Barthel suggests that utopian societies turned tourist attraction may well function as morality plays to the industrial age (1984:157). They serve

purposes both cathartic and ideological for the tourist, filling him with nostalgia for the elemental and the simple. It perpetuates and reinforces the static myth of the "garden" embodied in the rural past, of "agrarian paradise" (Ibid.:174).

The opportunity for face-to-face contact with individuals of another culture, for a first-hand account of foreign lifestyles and living standards, gives many people the chance to appreciate anew their life at home in Canada. Many tour operators believe the opportunities they package broaden Canadian perspectives on the world and teach them about themselves. Being pitted against something different means a release from the routine and the mundane; like a breath of fresh air, it offers a new lease on life.

This notion recognized by both package tour operators and their patrons. Repeatedly, informants attributed motivation in Canadian travel to a desire to see a different culture, to discover how other peoples of the globe live, and to put a face to the mug that was 'made in Taiwan.' While this notion was reiterated by adventure travel operators more frequently than mainstream operators, experiencing a difference appears to be an important motivating factor common to many Canadian tourists.

The sharper the contrast, the deeper the imprint a holiday experience makes. This is a major selling advantage of many

adventure tours. A package labelled the 'Other Orient' contrasts with the Orient supposedly familiar to Canadians; phrases such as 'the opposite continent,' 'a land of wonderful differences,' and 'an intertwining diversity of traditions' create contrast to the commonplace. Sun holidays, on the other hand, provide little contrast from one location to another; repeated year after year, it is difficult to remember to what country the beach one sat on last winter belongs. However, the depth of the imprint is also dependent upon individual definitions of what constitutes 'difference.' Symbols of the exotic and of adventure depend upon preconceptions about the destination held by the potential tourist. For one it may simply be a tropical climate. For another it requires a more complete contrast that may combine the cultural distinctiveness of Masai warriors and the natural wonders of the Serengeti Plains and Mount Kilimanjaro with the uniqueness of open jeep transport and tent accommodation.

In addition to the quest for the unique, the desire to be an active part of adventure, to test and challenge oneself is an aspect of travel motivation that is relatively new. Feelings of danger, excitement, and physical accomplishment provide a psychological contrast to the routine of daily life at home. These experiences also extend to new limits the participation and fitness ideals that have

recently been adopted in North American culture. In this active type of vacation, the motivation to 'getting-away' so prevalent in purchases of the more passive sun-type package, takes second place to an element of 'going-to.' As one operator - whose packages are 'marathons of physicality'- put it, 'the difference between tourism and travel is that one's a business and the other's a way of life.' Ironically, this means he has made a successful business of selling this way of life.

7.3.2 Pilgrimage

Another systematic property of the displacement of ideals across space is found in the tendency of colonized countries to regard the "fatherland" or the "mother country" as the perfect fulfillment of local ideals (McCracken 1988:107). In Canada, a policy of multiculturalism has sharpened our senses of Europe in our day-to-lives; for second, third and further generation Canadians this has created a desire to get back to one's roots.

Turner's theory of pilgrimage (1973) has been paralleled to the motivations and behaviour of a tourist; this includes both the sense of the journey and the filling in of a gap in one's personal past. The tourist is not totally unlike the religious pilgrim: each in his own fashion is searching for and susceptible to a certain myth.

However, although both embody a quest for ideals, the ideals stressed tend to be distinguishable between secular and religious, this-worldly and other-worldly.

The cultural pilgrimage is particularly comparable. The tourist going back to the place where his ancestors lived is as much on a personal journey as the pilgrim enroute to the place of his spiritual origin. Both involve a sense of finding the missing link to one's heritage by experiencing in person a place to which they have long felt spiritually or ancestrally connected. Indeed, MacCannell suggests that the motive behind a pilgrimage is similar to that behind a tour as both are quests for authentic experiences (1973:593). Pilgrims attempt to visit a place where an event of religious importance actually occurred. Tourists present themselves at places of social, historical, and cultural importance.

Both tourist and pilgrim are in the process of achieving some personal goal. Both also involve the element of journey that commences at one point and arrives at its goal by one's own means. Cycle tours and hiking tours that require personal energy to arrive at the end point of each day most strongly emphasize the element of personal journey. Tours that encourage cyclists to get lost, to discover and explore on an individual basis promote the notion of creating your own adventure and watching it unfold moment by

moment. Organized cultural pilgrimages are meant to be 'celebrations of peculiarities and delights.' It is a chance to realize individual impressions of the romantic, the exotic, or the adventurous.

As one travel writer put it; "If the(se)...adventures have any value, beyond that of dream stuff, it lies in their confirmation of the poet's wisdom: that at the end of our journey's we must return to the place where we began and know it for the first time" (Jones 1988:33).

A transformative process is taking place in the subject and the means of Canadian international travel. The polarization of specialized from mainstream firms has partially been a result of changes in the Canadian travel public who are now more experienced and have higher expectations. Consequently a demand for adventure travel has fostered a growth in the number of specialty tour operators catering to that demand. The new adventure packages have, in turn, created a larger and more diverse appetite for this type of tour. Cultural pilgrimage and romanticized primitive tours are two examples of this nascent trend. Each represents a new form of self-discovery that Canadians now can buy from tour operators.

NOTES TO CHAPTER 7

1 Although Schreyer, et.al. (1984) are concerned specifically with recreation behaviour - river trips specifically - their discussion would seem to be applicable to travel behaviour as well.

2 Of those Canadian trips that involve a package, the 'planned adventurer' is by far the major market segment represented (CTAMS 1983). This segment is composed of people who like to make all their travel arrangements before setting out on a trip, which preferably is to a different place each trip. The benefits this group look for in a package holiday is, first of all, experience - change from job and home, excitement, and a desire to see as much as possible - and, secondly, active participation or physical activity. This group is, on average, better educated, more affluent, and tends to live in urban areas.

CHAPTER 8

CONCLUSIONS

To propose that package tour operators play a brokerage role requires evidence of their performance of this role: to be a broker is to act like one. This has been demonstrated and evaluated at two interactive levels. First, the tour operator is shown to be a vital link within the tourism process. This position of linkage allows him to package what the destination is and has according to what Canadians need and want. Second, the tour operator is shown to package an amalgam of touristic goods into a culturally constituted whole and then market it as a dream vacation. He enables this dream to become a reality in the easiest, least expensive way.

In conclusion, the interrelationship of these two levels of operation is a dialectic. Situated between the dream and the dreamer, the tour operator commoditizes one for the other; skilled in marketing that commodity, his situation between the two is secured.

7.1 A Vital Link

As an actor in the tourism process, the tour operator has brought tourism to the masses and the masses to

tourist regions. Historically, tour operators have been intermediaries of considerable commercial significance between the host and the home regions. Over the years they have proven themselves to be innovative entrepreneurs and successful profit-oriented communicators. For the Canadian consumer, package tour operators have made travel as desireable and available to the public as basic goods. By the 1970's tour operators had become a fully-fledged part of tourism, their growth achieving something of a revolution in tourism. Tour operation succeeded in reducing the real price of travel abroad and in so doing brought overseas holidays to a segment of the market not reached by conventional methods.

Tour operators communicate necessary information to potential tourists about the destination and the holiday. This is a need inherent to selling a product that is intangible; unless the client has previous experience and/or acquaintance with the destination, he is in effect purchasing an expectation. Operators also act as communicators to destination personnel who supply the product and who likewise must cater to an unseen consumer of his services.

Tourist hosts and their societies are considered only briefly in this study. The research conducted here on package tour operators cannot provide adequately for the

hosts' point of view, a matter which therefore must be charged to future investigation. Nevertheless, the direct negotiations operators hold with destination personnel indicate that hosts are potentially influenced by the networking role of the tour operator. Studies of the tourism industry such as this one may contribute to a fuller understanding of the host-guest interaction and tourism effect in destination regions.

It has been argued elsewhere (Hanefors and Larsson 1988:26) that tour operators are in the position, and therefore have a responsibility, to work as mediators between cultures. A generally poor level of host-guest interaction and understanding can begin to be remedied by educating destination representatives about the hosts as well as about the tourists. This raises questions as to the quality of and control tour operators hold over communication between hosts and guests.

The success of a destination aiming for a share of the Canadian market depends in part on a thorough understanding of the reasons behind Canadian travel, and on communicating their message of product and value in tune with Canadian travel motivations. In choosing, contracting and advertising a particular destination, the tour operator is in a strong position to mediate and convey this information in harmony with his own profit motives. This is

especially true with regard to destinations like Cuba or the Dominican Republic which Canadian tour operators claim were popularized as a direct result of their intervention.

Questions such as the effect that vertical integration of the travel industry - franchising and standardization - has upon the flexibility of linkages for developing host countries, are worth investigating. For example, the study of package tour operators as economic brokers shows how sets of relations deriving from different industrial contexts can be combined toward entrepreneurial profit. However, the establishment of organizations like CATO may have implications of stronger bargaining power on the side of the Canadian operator negotiating in destinations made popular among the Canadian public. This may have ramifications of weakened local control over tourism development in these areas.

As the industry and the market matures and develops, a greater demand presents itself for holidays to remote areas. This growing demand has implications of economic, social, and cultural effect brought about by tourism development in these 'undisturbed' regions. New directions and growing popularity of 'adventure tours' being packaged by the industry causes one to look more critically at the scope, nature and future of international tourism.

7.2 Packaged Dreams

The intermediary role of the tour operator is interrelated with his role as a dream packager. In order to be a packager of travel dreams, the tour operator needs first to be in a brokerage position between the subject and object of tourism. Conversely, the more effective he is in packaging and marketing that dream, the stronger his brokerage role becomes as a means of connecting the subject and means of tourism.

In the generating region, the package tour operator acts as a culture broker in his home society by interpreting values and motivations and marketing holiday dreams accordingly. As a packager of dreams, he both responds to and directs movements within the Canadian travel market. In reality, this is manifested in the tightly knit interactive relationship the marketer holds with the consumer.

Presumably, package tour operators perceive a base of consumer needs and wants, and then select culturally relevant images that further shape those needs and wants in order to create demand for their specific product. This implies that tourism as a commodity has a value as a sum of social signs in the minds of the people who produce and market them. Brochure photos and discourse are illustrative in their presentation of images of paradise and of dichotomies between the mundane and the exotic. By feeding

on and projecting the value of 'getting away' mainstream package tour operators have been able to standardize their product, making it marketable to a wide audience. Thus, the social meaning is based not on tourist behaviour itself, but on representations of that behaviour. This is an idea basic to advertising discourse (Thurot & Thurot 1983:178). In this view, the meaning of travel to the Canadian market and the social codes which act on tourism can be determined by how it is presented and represented by the marketing arm of the tourism process.

Tour operators exploit the notion of goods as bridges to displaced meaning. They consistently suggest through their brochures and television advertisements that a holiday vacation will give the consumer access to displaced ideals. The unspecified nature of future holidays possesses great powers of persuasion and optimism. In fact, well before the tourist departs, he anticipates the experience and the possession of certain ideal circumstances that exist now only in a distant destination. In this case, a package tour helps the individual contemplate the possession of an emotional condition, a social circumstance, even an entire style of life. The package becomes a vision of life as it should be lived.

The role of advertising consists of transmitting a message to the larger social milieu which verifies and

responds to it. An advertisement to escape to paradise is effective only if the consumer is from the culture in which the advertisement occurs. If, however, the social milieu decides that certain messages no longer suit them, advertising fails and marketing strategies must be adjusted. The packager strives for "expressive coherence", as Goffman (1959) calls it, in order to successfully create a compatible and consistent impression with the tourist's overall definition of the holiday situation. If the tourist is secretly skeptical of the reality being impressed upon him, the tendency may be "to pounce on trifling flaws as a sign that the whole show is false" (Goffman 1959:51).

Travel consumers are active participants in an ongoing enterprise of self-creation. The tour industry supplies individuals with the means and products to realize their various and changing ideas of what it is to be an adventurer or a member of the leisure class. The 'stuff that dreams are made of' is as variable as it is individualistic. For this reason, specialty tour operators consider personal client consultation a common priority. Because adventure packages are generally more expensive, of longer duration, and thus more 'once-in-a-lifetime', the reality must be as close to the dream as possible. Individual consultation has become an indispensable service of specialty operators for whom success lies not in selling a general dream in volume

quantities, but in the professional ability to satisfy the individual dream.

Time-share condominiums and the idea of an 'endless vacation' may threaten the sales of package tours which must be repurchased year after year. Standardized sun, sea, sand tours may increasingly be at risk by the growing sophistication of the Canadian tourist market that either wants to travel independently or looks for a more customized adventure tour. The dream appears to be under threat of being redefined.

This has implications for the continued success of tour operators. In competition with each other and for the larger leisure dollar, it would seem that tour operators are living in a fools paradise to think they have no need for accurate knowledge of their market. Nevertheless, the low priority most tour operators give to market research seems not to abate their financial success. This suggests that the dream of travel is indeed a powerful symbol to Canadians who continue to buy packaged tours. Consequently, tour operators need not compete in terms of their actual product, but rather in terms of image. As part of the Canadian culture themselves, packagers operate within McCracken's world of meaning: as a culturally constituted good, tourism has an implicit value for consumer and marketer alike.

North American culture is characterized by constant and rapid change. The dynamic quality of cultural categories makes them not only indeterminate, but also subject to the manipulative effort of individuals and groups. Marketers, for example, can seek to establish or encourage a new culture category of person (e.g., the 'adventurer,' the 'leisure class,' the 'horizon club') in order to create a new market segment. In this way, travel marketers transform material relations into symbolic expressions and back again, a capacity MacCannell believes unique to the modern world (1976:145).

McCracken believes that the role goods play in the negotiation of constant social change is fundamental (1988:137). Committed to continual change, it is partly due to the role goods play that our society does not fall apart. By coding travel goods with a social meaning, society is able to both encourage and endure change; in this sense tourism acts as an agent of continuity and change.

As an agent of change, tourism allows the borrowing from one status to another. It helps social groups establish alternative ways of seeing themselves and also serves to help society incorporate these changes into the existing cultural framework. Tours encourage seniors, for example, to adopt a 'me' mentality and to enter and be recognized as participants in the cultural category of 'traveller'.

As an agent of cultural continuity, tourism establishes and re-establishes status. While travel itself has become an activity of the masses, particular destinations and types of travel serve to distinguish between positions of status. In addition, tourism has a stabilizing capacity to promote communitas in the midst of structure as part of the modern social cycle.

The study of the tour operator industry is vicariously a study of Canadian social/cultural reality and change. A cultural analysis of what motivates Canadians to buy tour packages identifies the importance of travel as a means of status and escape. The interactive relationship between tour operators and their travel market indicates the degree to which tourism has become an integral part of the Canadian lifestyle. As part of the process of continuity and change, package tour operators are brokers who manipulate cultural categories of meaning, who promote social alternatives, and who mediate between fantasy and reality.

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