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PACKAGE TOURS: NEW TRENDS AND SOCIO-ECONOMIC
ENVIRONMENTAL INFLUENCES

by

© Carol Anne Chovanec, B.A. (Honours)

A thesis submitted to
the Faculty of Graduate Studies and Research
in partial fulfilment of
the requirements for the degree of
Master of Arts

Department of Geography

Carleton University

Ottawa, Ontario

January 19, 1987

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PACKAGE TOURS: NEW TRENDS AND SOCIO-ECONOMIC
ENVIRONMENTAL INFLUENCES

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Abstract

Tourism is a growing phenomenon. The numbers of participants are growing, thus causing expansion in many areas of the industry. This research hypothesizes that package tours catering to the special interests of tourists is one such area of expansion. This hypothesis is examined in the context of the broader field of society. Explanatory variables for the hypothesized increase are sought in the changing conditions of the political, economic, social and technological environments. Both a content analysis of newspaper travel advertising and a survey of Ontario tour operators are used to determine the validity of the hypothesis. It is found that special interest tours are increasing and that this increase has been influenced by external environmental elements.

Table of Contents

	<u>Page</u>
Chapter 1: Package Tours in Context	1
1.1 Introduction and Objectives	1
1.2 Context	2
1.3 Tourism and Geography	7
1.4 Thesis Structure and Research Procedure	9
Chapter 2: Tourism and Package Tours	14
2.1 Introduction	14
2.2 Definitions	15
2.3 Tourist Types	16
2.4 Package Tour Variety	20
2.5 Package Tour Travel Rationale	22
2.5.1 Security	22
2.5.2 Sociability	23
2.5.3 Identity	24
2.5.4 Time	25
2.5.5 Money	26
2.6 Criticisms and Developments in Package Tour Travel	28
2.7 Conclusion	32
Chapter 3: The Broader Societal Environment and Package Tours	34
3.1 Introduction	34
3.2 Reasons for Participating in Package Tour Travel	38
3.2.1 Security/Safety	38
3.2.2 Sociability: A New Process of Socialization	40
3.2.3 Identity	43
3.2.4 Time	45
3.2.5 Money	47
3.3 Manifestations of the Broader Environmental Developments in Package Tours	49
Chapter 4: Methodology	54
4.1 Context of Thesis Research Questions	54
4.2 Content Analysis of Newspaper Travel Advertisements	59
4.3 Survey of Ontario Tour Operators	67
4.3.1 Verbal Interviews of Selected Tour Operators	69
4.3.2 Mail-Back Questionnaire of Ontario Tour Operators	72
4.4 Summary of the Research Methodology	74

Table of Contents cont'd.

	<u>Page</u>
Chapter 5: Analysis	75
5.1 Introduction	75
5.2 Content Analysis of Newspaper Travel Advertising	76
5.2.1 Newspaper Travel Advertising Deviations and Frequency	77
5.2.2 Number and Variety of Destinations in Newspaper Travel Advertising	82
5.2.3 Trends Found in the 'Descriptors' Used in the Newspaper Travel Advertising	85
5.2.4 Trends Found in the 'Tour Types' Offered in the Newspaper Travel Advertising	96
5.3 Analysis of the Results of the Tour Operators Survey	104
5.3.1 Growth in the Numbers of Tourists and the Amount of Tourism	105
5.3.2 The Tourist Demand for Value	109
5.3.3 The Need for Flexibility of the Tour Operators and The Package Tour Product	113
5.4 Summary and Conclusions of the Analyzed Data and Results	116
Chapter 6: Conclusion	124
6.1 Introduction	124
6.2 Summary of the Thesis Research	125
6.3 Conclusions of the Thesis Research	128
Bibliography	132
Appendix	138

List of Tables

Page

4.1	Population of Capital Cities, Selected Census Years	56
4.2	Population of Census Metropolitan Years, Census Years	56
4.3	Circulation Figures Presented in the March 1986 Publisher's Statements for Canada's Largest Newspapers	57
4.4	Population Summaries, Selected Years	58
4.5	Urban and Rural Population, Canada and Provinces 1981	58
4.6	Dates and Page Totals for the Saturday Travel Sections Analyzed for Content	62
4.7	Description of the Elements of the Research Categories	65
4.8	Selected Totals and Percentages of Head Office Locations of Canadian Tour Operators	68
5.1	Total Number of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> Travel Sections in the Years 1955, 1965, 1975 and 1985	79
5.2	Total Number of Different Destinations in the Travel Advertisements Analysis in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985	83
5.3	Total Number and Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of 'Budget'	86
5.4	Total Number and Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of 'Pleasure'	89
5.5	Total Number and Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of 'Exciting'	91
5.6	Total Number and Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of 'Planned'	93

List of Tables cont'd.

Page

5.7	Total Number and Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Describing 'Once-over-lightly' Tour Types	97
5.8	Total Number and Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Describing 'Fixed Site' Tour Types	99
5.9	Total Number and Percentage of Advertising Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Describing 'Special Interest' Tour Types	102
5.10	Ranking of Factors Described as Effecting the Individual Tour Operators' Package Tour Demand	110
5.11	Changes in the Number of Special Intest Tour Operators in Existence	114

<u>List of Figures</u>	<u>Page</u>
1.1 The Relationship Between Leisure and Tourism	5
1.2 The Geographical Elements of Tourism	10
1.3 The Tourism System	10
2.1 A Model of The Tourist Industry	17
2.2 Plog's Continuum	18
2.3 Tour Package Codes	21
2.4 Tour Operators in the Tourism Market	27
5.1 Total Number of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> Travel Sections in the Years 1955, 1965, 1975 and 1985	80
5.2 Total Number of Different Destinations Mentioned in the Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985	84
5.3 Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of 'Budget'	87
5.4 Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of 'Pleasure'	90
5.5 Percentage of Travel Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> Travel for Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of 'Exciting'	92
5.6 Percentage of Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of 'Planned'	94
5.7 Percentage of Advertisements Analyzed in <u>The Globe and Mail</u> and <u>The Toronto Star</u> for the Years 1955, 1965, 1975 and 1985 Describing 'Once-over-lightly' Tour Types	98

List of Figures cont'd.

Page

5.8 Percentage of Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Describing 'Fixed Site' Tour Types 101

5.9 Percentage of Advertising Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Describing 'Special Interest' Tour Types 103

CHAPTER 1

PACKAGE TOURS IN CONTEXT

1.1 Introduction and Objectives

It is suggested by some that tourism is becoming a principal industry in Canada as well as many other countries around the world. It is expected by authorities in the field to continue the steady rate of growth it has demonstrated since the end of World War II and throughout its modern history (Papson, 1979; Sheldon, 1986). Its growth has been, and continues to be, influenced by developments in the broader environment and the consequent changes in the many individual elements within the industry itself.

In the 1840's, Thomas Cook introduced the first package tour, an event that initiated the tourism industry's existence and instigated its future growth. Package tours or inclusive tours, are defined as "...the combination of components of a vacation (such as accommodation, transportation, entertainment, and meals) which are sold to the consumer as a single product at a single price" (Sheldon, 1986: 349). They form a substantial and influential element of the tourism industry. As such, package tours have been chosen as a solid reference point from which to research the growth in this industry. More specifically, the research presented herein hypothesizes that there is an increase in the numbers of package tours catering to the special interest of the tourists. The research then examines this potential growth area in the context of the

external environment. It attempts to explain the increase in special interest tours in light of the conditions and changes in the social, technological, political and economic environments. Recognizing links between the broader environment and package tours should provide a better foundation from which future preparations and planning for package tours, and conceivably tourism generally, can be conducted. A thorough comprehension of package tours can prevent adverse effects from befalling the environments popular with tourists and can produce better marketing strategies to sustain and stimulate the industry. Thoroughly comprehending package tours includes understanding their position within the industry, considering them in the context of more global developments and recognizing their geographical significance. These associations of package tours are presented in the following sections.

1.2 Context

Package tour travel is a single form of tourism and package tours, a single element within the industry. Factors influencing tourism and the tourism industry generally must also, therefore, affect package tours. Two such factors are economic conditions and political circumstances in both the generating and the host countries. Without the economic stability or prosperity of the generating regions, tourists will be limited. Without governmental cooperation and the tolerance of continual movements of people, tourist destinations will be limited. As relative prosperity flourishes in the Western

world, and as more and more countries open up to tourists (i.e., China, the Eastern bloc countries, Third World nations) in recognition of tourism's potential for cultural and economic exchange, few limitations are expected (British Tourist Authority (BTA), 1977; Economic Intelligence Unit (EIU), 1976; Nash, 1979). In fact, as was mentioned in the introduction, a continued expansion of tourism is predicted.

Also affecting tourism and, thus, package tours, is transportation technology. Tourism is concerned, ultimately, with the movement of people (Robinson, 1976), and transportation is required to move people. Thus, without adequate transportation, tourism is limited. Conversely, as transportation efficiency improves with technological advances, tourism prospers. In fact, major developments in the history of tourism occur coincidentally with major developments in transportation technology (Cohen, 1972; Robinson, 1976). Until the invention of steam in the 1840's, "...travel...was something to be endured rather than enjoyed" (Holloway, 1983: 23). The new railroads and steamships replaced older, arduous modes of transportation enabling more people to travel farther, faster and more comfortably. Early in this century, the automobile made major inroads in travel. But the most significant development to date has been the introduction of the aircraft for domestic, non-military use (Burkart and Medlik, 1974). It brought about the final phase of a changeover from what was once an activity engaged in only by the upper classes of society to an activity to be enjoyed by the majority in the industrialized

countries.

Although the reasons for travel may vary over time and among individuals ranging from business to pleasure, from rest and relaxation to participation and exhilaration, and from the passive to the active acquisition of knowledge, the means to that end remain the same. Transportation is that means. As transportation technology increases the efficiency of the movement of people, it continues to shrink travel time and space.

Tourism is also dependent on a set of social values corresponding to the lifestyles and activities it promotes. It is not only the economics, the politics or the transportation technology that are necessary for tourism to prosper but also the folkways, the mores and the ethics dictating society's conduct that ascertain whether and how tourism will develop.

Tourism, along with the related and overlapping topic of recreation, is part of a much broader subject of leisure (Figure 1.1). Leisure activities are generally described as those activities that individuals choose to do. Except for the smaller subset of tourism that involves those required activities such as business, tourism is a subset of leisure. It is distinguished as that aspect of leisure involving travel beyond the local environs. And it is within this broader field of leisure that societal values regarding tourism are identified. The amount and importance of leisure time establishes the same or similar circumstances for tourism.

Leisure time and related activities have grown in importance

Figure 1.1

The Relationship Between Leisure and Tourism

Source: Murphy, 1983, p. 9.

as part of life in industrialized nations of the 1980's (Kabanoff, 1980; Mihovilovic, 1980; Parker, 1976; Robinson, 1976). In times of self-subsistence, leisure was inextricably intertwined with other elements of daily life (Kabanoff, 1976; Parker, 1976). With the Industrial Revolution, however, paid work was removed from the home and leisure from the work place thus establishing a differentiation between the two (Hoivik and Heiberg, 1980; Friedman, 1960; Kabanoff, 1980). Over the years this differentiation has become more distinct as a result of the reduction by half of the number of work hours per week for the wage worker in industrial society. Where once the time outside of work was scarcely long enough to recuperate and regenerate before returning to work, leisure time now accounts for approximately one third of the wage employee's time (Chubb and Chubb, 1981; Mihovilovic, 1980). The other two-thirds are generally accounted for in time required for biological and social needs and time required for work.

Along with these dramatic changes that have occurred in work and leisure patterns, there have been corresponding attitudinal changes. Leisure time has come to be regarded as a fundamental and necessary part of life. It has come to be regarded as a right (Parker, 1976). A consequence of these new views has been a growing interest in what is being done during that leisure time. Since it has come to account for such a significant part of life, the activities engaged in are significant. Since tourism constitutes a portion of those activities, it, too, has generated a heightened interest.

The time available for leisure is predicted to continue to rise as a result of developments toward a still shorter work week (Kabanoff, 1980; Mihovilovic, 1980; Papsen, 1979). A new emphasis and even more importance will be placed on leisure activities such as tourism. It is foreseeable, therefore, that tourism will succeed in accomplishing the growth expected of it in the years to come.

Thus far a number of factors have been presented, all of which potentially influence tourism. These factors, far from being distinct however, are very much interrelated. As one changes, it has the capacity to change one or more of the others. As technology progresses and enhances the capability of computers to serve, or to possibly replace, people in the workplace, it is conceivable that the number of work hours will continue to decrease and, thus, leisure time increase. As leisure time increases, it is likely that tourism activity will also increase. It is, therefore, understandable and feasible that the combination and interrelationship of economics, politics, technology and values have been and can be influential determinants in tourism's expected climb to prominence. Along with the growth in tourism activity, there is a need for, and evidence of, increased interest in tourism research particularly from a geographical standpoint. This geographic research is described below.

1.3 Tourism and Geography

The prosperity experienced by the tourism industry and its expected continuation in a similar manner has had its effects on

tourism research. The scope of tourism research has expanded beyond its traditional boundaries of study. The increased interest illustrated earlier in this chapter has prompted the investigation of tourism and its surrounding circumstances from a variety of viewpoints in a number of fields of interest. Within geography, tourism is no longer the sole concern of the economists, but has become a significant topic of research in all branches of the discipline. "There is scarcely an aspect of tourism which does not have some geographical implications and there are few branches of geography which do not have some contribution to make to the study of the phenomenon of tourism" (Matley, 1976: 5).

Tourism's connections with geography have been documented by many geographers (Britton, 1979; De Groot, 1983; Leiper, 1979; L. Mitchell, 1979, 1984; L. Mitchell and Smith, 1986; Pearce, 1979; Robinson, 1976), all of whom review the influence geographical theories have had on tourism research in the past. They outline how tourism research has focused on economic concerns, on spatial differentiation and environmental impacts, for the most part conforming to, and consistent with the geographical paradigm in power (Carlson, 1980; Pearce, 1979). These geographers have also advocated the need for tourism to be recognized as a serious and unique field of research and not simply a topic within a broader field of interest as it was under economic geography and as it is now under recreational geography. Tourism has proven itself to be of widespread interest and concern and deserving of independent consideration.

The geographic approach to tourism has been outlined differently by different geographers but the essence of many of these discussions is best described here:

The geographer's point-of-view is a trilogy of biases pertaining to place, environment, and relationships....The geographer...is concerned about earth space in general and about place and places in particular....The environmental bias of the geographer is divided into two segments: physical and cultural....The third bias of the geographer is to understand the relationship which exists between places and between environments (L. Mitchell, 1979: 237).

Both 'space' and 'place' are required before tourism can transpire. Tourism requires a 'place' to come from (the generating region), a 'place' to go to (the destination) and 'space' between (the transit route). These places and space make up the 'Geographical Elements of Tourism' as graphically depicted in Figure 1.2. By adding in the other two elements mentioned by L. Mitchell, environment and relationships, Leiper comes up with "The Tourism System" (Figure 1.3).

This thesis follows the geographical point-of-view presented here. It researches the relationship, portrayed in Figure 1.3, between the components of tourism, specifically package tours, and the broader physical, cultural, social, economic, political and technological environments and its most recent manifestations.

1.4 Thesis Structure and Research Procedure

A content analysis of newspaper advertisements, personal interviews, mail-back questionnaires and a literature review are the methods of research employed in this thesis. The literature

Figure 1.2

The Geographical Elements of Tourism

Source: Leiper, 1979, p. 397.

Figure 1.3

The Tourism System

Source: Leiper, 1979, p. 404.

Signifies
The Tourist
Industry

regarding package tours is reviewed in Chapter 2 along with definitions of the various terms used in tourism. This chapter discusses the type of tourists who take package tours; the content or components of package tours; the reasons for, and criticism of, package tour travel; and traditional forms, and modern modifications, in package tours. All are intended to provide the necessary background information on package tours before going on to suggest how and why they may be changing.

The literature review continues in Chapter 3 but concerns a different topic. It covers recent societal changes such as the effects of modern technology on work and leisure patterns, and their consequent influences on tourism. It covers the changes occurring in the work place and at home. It covers changing views of leisure and the activities involved therein. It searches for and examines value changes in society. This chapter also searches for potential connections between these societal changes and the package tours. Do changing technology, work and leisure patterns, and attitudes toward them influence the type of package tours taken, where people go on such tours and what they see and do?

Chapter 4 describes the two major methods of research used to obtain data. The first is a content analysis of newspaper travel advertisements beginning in 1955 and carried out at ten year intervals thereafter (1965, 1975, 1985). The Saturday travel sections of both The Globe and Mail and The Toronto Star*

*Note: The Toronto Star before April 1, 1972 was entitled The Toronto Daily Star. To avoid complication, however, the newspaper will be referred to as The Toronto Star throughout the thesis.

were reviewed twice in each of these years, the summer and winter vacation periods, and an analysis of their content executed.

The second is a survey using interviews and mail-back questionnaires and directed at all Ontario tour operators. "A tour operator is defined to be a company which negotiates with hotels, transportation companies, and other suppliers and combines these vacation components into a package tour" (Sheldon, 1986: 352). In other words, it is the tour operator who should best be informed as to the why's and wherefore's of package tour trends.

Twelve Ontario tour operators were personally interviewed in Ottawa and Toronto. They were asked questions regarding package tour trends and their influencing factors. Following these interviews, and with the information obtained from them, a questionnaire was drawn up to be mailed out to all the remaining Ontario tour operators asking similar but refined questions.

The tour operators contacted were those whose names appeared on the most complete, up-to-date listing available, the Personnel Guide to Canada's Travel Industry: Spring/Summer 1986 (Canadian Travel Press), and those whose companies were based in the province of Ontario. Ontario was chosen as the research study area for a number of reasons, one being its large percentage of resident Canadian tour operators. But it was also chosen for its large population concentration; the high distribution figures for the two newspapers in question; and its accessibility to these and other research resources.

The data accumulated from the content analysis, the questionnaires and the interviews were analyzed to determine if a trend toward an increased number of special interest tours was evident or if there might have been any other trend developing. This analysis is found in Chapter 5 along with a description and discussion of the results.

Chapter 6, the final chapter summarizes the thesis research and results and concludes by suggesting how, by understanding the causal links and connections between the changes in the broader societal factors and the developing trends, tourism can better plan and prepare for a potentially prosperous future.

But before the causal links and the connections can be understood and the consequent appropriate planning transpire, a basic knowledge of the fundamental element involved, package tours, is essential. The next chapter deals with this issue.

CHAPTER 2

TOURISM AND PACKAGE TOURS

2.1 Introduction

The purpose of this research, as outlined in Chapter 1, is to examine tourism in the context of the external environment. In order to accomplish this goal, however, it is necessary to narrow the broad field of 'tourism' down to a smaller, more manageable field. The package tour, as a single, manageable, and important component of the tourism industry was, thus, chosen as the object of study. The research, then, specifically investigates recent and developing trends in package tours. Particularly, it investigates the possibility of an increase in special interest package tours. Subsequently, it investigates if and how this trend is influenced by the broader societal situation.

A review of exactly where and how package tours fit into the tourism industry is necessary before finding and analyzing any recent trends and their causes. To that end, this chapter reviews the relevant literature including definitions of tourism and related concepts and descriptions of tourist types, thus providing a frame of reference for the more specific description of package tour travel. Of particular importance to this research and the hypothesis set out is a description of the content of package tours which may later serve as a basis for a discussion of the findings of this research. Also important are the reasons for and against package tour travel. Once

described, these reasons may help to understand any change in the use of this form of travel. The literature concerning these two factors is, therefore, also discussed in this chapter. But first package tours must be placed in the context of tourism.

2.2 Definitions

Tourism is a growing phenomenon. The tourism industry generally, and the individual elements within the industry, have had to make appropriate adjustments in order to keep pace. Even the concept of tourism itself has undergone some modifications through the various stages of this growth.

...tourism, as we understand the term today, is of relatively modern origin. Tourism is distinguished by its mass character from the travel undertaken in the past....The annual migrations of people began rather more than a hundred years ago but the present day exodus...is essentially a post-war phenomenon (Robinson, 1976: xxi).

Detailed descriptions of this 'post-war phenomenon' have been undertaken by many authors. For the most part, their definitions have been unique to the particular author's purpose and perspective (Leiper, 1979). There is, however, a definition of 'tourist' proposed by the U.N. Conference on International Travel and Tourism (1963) which is "...the most specific, but also the most inclusive of the various definitions..." (Cohen, 1974: 530) as well as the one most frequently referred to.

'Tourists', then, are:

...temporary visitors staying at least twenty-four hours in the country visited and the purpose of whose journey can be classified under one of the following headings: (a) leisure (recreation, holiday, health, study, religion, sport), (b) business, family, mission, meeting (U.N. Conference on International Travel and Tourism, 1963).

A corresponding definition of 'tourism', thus, would include the actual movement and activities of those 'tourists' at the destinations as well as enroute. Or, more precisely, "...the temporary short term movement of peoples to destinations outside the places where they normally live and work and their activities during the stay at these destinations" (Burkart and Medlik, 1974: 311).

And lastly, the "...tourism industry consists of all those firms, organizations and facilities which are intended to serve the specific needs and wants of tourists" (Leiper, 1974: 400). The elements of the tourist industry are geographically represented in Figure 2.1.

2.3 Tourist Types

This model illustrates the variety and interrelationship of elements in the industry. Although the tour operator element is central within the model and to the purpose of this thesis, not all tourism or tourists draw on the services of the tour operators. Just as there are different purposes for travel, as was outlined in the 'tourist' definition, there are different ways of travelling to meet those purposes. Some tourists do use the services of tour operators and travel as part of a larger group. Or they may purchase a package that also allows for some independent decisions and activities. These two types of tourists are what Erik Cohen (1972) would refer to in his typology of tourist roles as 'the organised mass tourist' and 'the individual mass tourist' respectively. Together these two types are dichotomized

Figure 2.1
A Model of the Tourist Industry

Source: Robinson, 1976: xxx.

by Cohen as 'institutionalized tourist roles' due to their use of, and participation in, the tourism system or establishment.

The other half of this dichotomy represents those tourists who choose not to partake in package itineraries. Rather, they choose to either plan their trip independently, as in the case of Cohen's 'explorer', tourist type, or not to pre-plan at all and, as much as possible, avoid the entire tourism establishment as does the 'drifter' in Cohen's typology. These last two types make up the 'uninstitutionalized tourist roles'.

Another predominant typology of tourists relates tourist type to destination choice. S. Plog (1972) describes five tourist types along a continuum ranging from 'allocentric' to 'psychocentric' (Figure 2.2). Allocentric tourists include those tourists found first at new destinations; the forerunners who refuse to revisit an area unless they are the only type there. At the opposite end are the psychocentric tourists who will not go anywhere that has not been well-frequented by many before them.

Figure 2.2

Plog's Continuum

Source: S. Plog, 1972.

These tourist typologies represent efforts to define and describe tourists; to disclose market segmentations in order to better understand different groups of people and their touristic tendencies. A considerable amount of recent research on market segmentation and tourist activity delves into the psyche of modern men and women. Maslow's 'hierarchy of needs' and its level of psychological maturity, motivation, personality, morality and intellect have been reviewed for such purposes (Pearce, 1982). Similar reviews have been made of a study examining values, drives, beliefs, needs, dreams and special points of view to describe values and lifestyles (VALS) at different stages of life (A. Mitchell, 1983). "Psychographics, also referred to as life style data and activities, interests and opinions (AIO's)..." (Schewe and Calantone, 1978: 14) and demographics are two more methods of segmenting an everchanging market and, subsequently, categorizing tourists.

It is evident that, just as there are many types of people, there are many types of tourists. These tourist types may or may not choose to use the services of tour operators or to purchase and be a part of package tours. Package tours, however, do account for a large share of all trips taken and are a vital part of tourism and the tourist industry (EIU, 1976; Travel and Tourism Consultants International, 1980). "Package tours represent a significant portion of the domestic tourism industry...[and] an even greater share of overseas tourism" (Sheldon, 1986; 350).*

*Note: References to the two preceding statements are both British (EIU) and American (TTCI and Sheldon). They do not refer to the Canadian case specifically. In a personal communication (Taylor, 1987), however, it was learned that the American and Canadian case are not too much at odds. It was also learned that there are varying opinions and statistics on package tour travel. Another source on the U.S. market (Taylor, 1986) indicates a less extensive use of package tours.

Package tour popularity is one of the reasons it was chosen as the object of investigation in this research. The other reason is that there is information available indicating both the motivations for package tour travel and the variety of package tours offered. This information serves to describe the package tour situation and, therefore, provides a point of reference from which to compare more recent developments.

2.4 Package Tour Variety

"A feature of the inclusive tour market, both air and surface borne, is the exceptionally wide range of holidays in terms of type, cost, destination and seasonality, which are on offer" (EIU, 1976: 30). Package tours, technically referred to as 'inclusive tours' (IT's), are available in different lengths from weekends to entire seasons. They are available throughout the year although peak periods do exist during the winter and summer vacation periods. They vary according to the components they consist of from a very basic package of transportation and accommodation to a totally inclusive tour such as Club Meditteranee, Butlin's or Jack Tar Villages where even the drinks and the tips might be included (Butlin's, 1986; The Globe and Mail; The Toronto Star). Their destinations have become essentially limitless and the modes of transportation are continually improving and expanding.

Package tours make use of coaches, railways, ships, cars, aircraft and even bicycles or a combination of one or more of these (EIU, March, 1971). The possibilities are almost

endless. It is recognized, however, that some modes of transportation are better suited for different types of packages. Ground transport, for instance, is more appropriate for general sightseeing tours than other modes. As well, some modes of transportation are more popular with particular individuals, groups or in general. But "[a]ir inclusive tours will...always comprise the lion's share of the market..." (EIU, 1976: 18). Air inclusive tours provide the most extensive example of options available within the modes of transport. The air packages can be arranged in the interest of the individuals and their requirements or they can be pre-set with restrictions on length of stay, components included, and numbers involved, and, then, coded accordingly (Figure 2.3)

Figure 2.3

TOUR PACKAGE CODES

FIT — FOREIGN INDEPENDENT TOUR

A trip where transportation, accommodation and sightseeing are specifically arranged by a travel agent for individual travellers.

GIT — GROUP INCLUSIVE TOUR

A special fare given to a group that meets certain conditions including a minimum number of people and a prepaid tour.

ITC — INCLUSIVE TOUR CHARTER

A round-trip, organized by a tour operator which combines air transportation, land services and accommodation in the price.

CBIT — CHARTER BULK INCLUSIVE TOUR

A special bulk fare purchase by a tour operator on a scheduled flight and packaged in conjunction with hotel and transfers/or car rental arrangements at the destination.

ABC — ADVANCE BOOKING CHARTER

A round-trip flight requiring advance booking and deposit, and involving restrictions on the length of stay.

86

Evidently, then, package tour options are many and varied and, thus, appeal to a wide range of potential participants. The decision to purchase and partake in a package tour, however, depends on more than variety. There are a number of other significant motives involved which are delineated below.

2.5 Package Tour Travel Rationale

2.5.1 Security

"Humans apparently need stimulation and travel can stimulate" (Lundberg, 1974: 106). Humans need variety. They need a break from routine; something new. They need to escape (Crompton, 1979; Davidson-Peterson Associates, 1986; Lundberg, 1974). But, at the same time, people also have a fear of the unknown (Pearce, 1982). Travelling to new places can cause anxiety (Pearce, 1982). A small dose of anxiety and adventure stimulates but too much can lead to discomfort, uncertainty and fear. Package tours, the tourism establishment they require and the tour guides they employ, serve as mediators between the familiar and the unknown (Crompton, 1979; Schmidt, 1979).

The problem of the system, then, is to enable the mass tourist to 'take-in' the novelty of the host country without experiencing any physical discomfort...he has to be given the illusion of adventure, while all the risks and uncertainties of adventure are taken out of his tour (Cohen, 1972: 169).

Since contemporary tourists generally generate from the Western, industrial countries, that which is familiar to the bulk of the tourists relates to the standards of their Western, industrial society (Holloway, 1983; Turner and Ash, 1975). They

want and need the modern, up-to-date, high-tech infrastructure and amenities they are used to. If they do not need to be constantly encapsulated in their environmental bubble, then they at least need to be able to retreat to it (MacCannell, 1976; McIntosh, 1977).

Once tourists have been to a destination on one or more occasions, the novelty begins to wear thin and their need for variety and adventure sends them off in search of new destinations. As tourists continue to demand these comforts of home and the security of the familiar at each new destination, there develops a geographic spread of a Western landscape (Eckbo, 1969; Turner and Ash, 1977). And instead of mixing in and with the local settings and peoples, the tourists are only surrounded by them (Cohen, 1972). Ironically, then, in their quest for something different, tourists insist on the presence and security of familiar environs, thus, defeating the original purpose of their travels (Cohen, 1972; Eckbo, 1969).

2.5.2 Sociability

"Much of travel grows out of man's social nature" (Lundberg, 1974: 115). Package tours, and particularly group package tours, are necessarily comprised of people and, therefore, provide the opportunity for indulgence in interaction (Crompton, 1979; Davidson-Peterson Associates, 1986). The interaction may be initiated with others directly or indirectly through the use of the tour representatives or guides as middlemen (Schuchat, 1983). Sometimes it is not so much the travel experience as the

conversation and companionship that are available through package tours that prompt people to participate in them. Package tours, however, do offer both, and tourists looking for either one or the other or both will be satisfied.

2.5.3 Identity

Not only do "people travel with people to be with people..." (Davidson-Peterson Associates, 1986: 8), as is the case with 'sociability', they also travel with people to provide a frame of reference with which to recognize their individual attributes and normalcy (Crompton, 1979; Schuchat, 1983). Although the 'identity' and the 'sociability' divisions have areas of potential overlap, there is distinction between the two in the psychological motivation involved. 'Sociability' refers to an individual's desire to participate in the package tour solely for the purpose of social stimulation. 'Identity', on the other hand, refers to an individual's need to identify with others and/or him or herself. "Tour groups offer a delimited and defined testing ground for the resolution of identity crises.... The group also reinforces a seemingly independent existence and the ability to co-exist with others..." (Schuchat, 1983: 469).

The package tour taken may have been originally organized around some common bond such as interests, affiliations or demographic groupings. Thus, identification with others is easy and obvious. On the other hand, it may also be the case that the tourists are a random group of individuals who may or may not find common denominators between them. According to P.J.

Sheldon's (1986) study of package tours to the Hawaiian Islands, however, it is not karma, kismet or coincidence that has brought the package tour group together. She found that the people purchasing a particular package tour, for that reason alone, possessed some personality parallels. And the more inclusive the tour, the more parallels there were among the tour-takers. "Therefore, the purchase of an inclusive tour ensures the traveller of similar companions" (Sheldon, 1986: 364).

The common denominator between the tour package takers need not be profound. Sometimes just being within a group of others provides the opportunity for the recognition of attributes in those others and, subsequently, the perception of one's own peculiarities and personality traits. It allows for the acknowledgement and definition of one's own identity (Crompton, 1979; Pearce, 1982; Schuchat, 1983).

2.5.4 Time

Attempting to coordinate and arrange one's own trips can involve a great deal of effort, be very time consuming and potentially very frustrating. Purchasing a pre-packaged tour alleviates the complication of independent planning (Davidson-Peterson Associates, 1986). Package tours are as their name suggests: an all-in-one, already-done-for-you commodity. It saves many tourists their highly cherished, and hard-to-find time by allowing tour operators and agents to do the arranging for them.

Package tours also indicate in advance the things to see and

do at the destination, thus, saving the usually limited trip time for actually seeing and doing as opposed to searching and wondering (Schuchat, 1983). Often, as much as some tourists might like learning in depth about the people and the place visited, it is unrealistic given that the majority of vacation periods average approximately two weeks in length. It is unrealistic to assume that anyone could acquire an advanced, or even adequate, comprehension of a foreign culture, particularly where there is a language barrier. Package and group tours can provide the tourists with, not a first-hand, but an insulated and encapsulated introductory version of the host community's characteristics.

2.5.5 Moneyp

Time-saving advantages provide a powerful motive toward the purchase of, and participation in, package tours. "Price is the real persuader, however.." (EIU, March, 1971: 63).

Tour operators buy the various components of a package in bulk, thus reducing the overall cost of those components. They are, then, able to arrange and combine the components into a package available for resale to the tourist at a lower price than if the independent tourist had attempted to purchase the same components individually (Holloway, 1983; Robinson, 1976) (Figure 2.4).

The package tour, then, is an economical way to travel (Davidson-Peterson Associates, 1986; Sheldon, 1986). It has been instrumental in the transformation of an historically

Figure 2.4

Tour Operators in the Tourism Market

Sale of goods/services

Arranging a sale for commission

Source: Holloway, 1983, p. 147.

aristocratic activity into one that can be enjoyed by the majority (Carlson, 1980; Nash, 1979). It has been responsible for setting in motion the phenomenon of 'successive class intrusion' at tourist destinations. The generalization that 'mass follows class' can be witnessed in touristic activity as the less wealthy (but now able to afford package deals) try to emulate their more wealthy counterparts by following them to their favourite destinations, thus changing the entire character of the activity and the place (Nash, 1979).

Thus, package tours are a popular form of travel for many because it is a safe, economical way to see and do that which is possible and reasonable in the time allotted. They can be personally enlightening as well as socially stimulating. But for every reason given in favour of packaging tour travel, there is an opposing viewpoint (Davidson-Peterson Associates, 1986).

2.6 Criticisms and Developments in Package Tour Travel

Instead of a 'safe and secure means of travel, the package tour is considered by some as boring. It is viewed as too sheltered and regimented for many who would prefer more spontaneity and contact with local activities. These people do not want to be confined with a group of strangers with whom they fear they may have little or nothing in common. They shun the possibility of being treated as a number in a group rather than as an individual. They complain of the speed of the tour. It's too fast. It's too slow. "It's hurry up and wait" (Davidson-Peterson Associates, 1986: 10). These critics of package tour

travel are generally not those who have experienced this form of travel (EIU, March, 1971; 1976). "The people who have never taken a tour are the people who are rejecting it negatively" (Davidson-Peterson Associates, 1986: 10-11).

It was determined earlier in this chapter that package tours are not for everyone. Good marketing strategies, however, continually work toward improving the product and winning an ever greater share of the market. Listening to the opinion of the critics can help the industry to better understand the pros and cons of package tours and, hence, the means of adapting appropriately. Quite clearly, in this instance, the crux of the problem lies not in the actual tours themselves, in that the criticisms are coming from those that have not taken them, but in the perceptions and stereotypical versions of them that the non-users and even the system itself adheres to

[M]ost tourism and travel operations...are premised around only three very simplified, if not over simplified models of what travel is all about. First is the business trip. Second is the trip to the fixed site to visit or stay, and finally, is the once-over-lightly tour (Coates, 1985: 78).

These perceptions and stereotypes are fashioned from traditional and early modern forms of travel. In fact, travel for the purpose of either commercial or government business were two of the earliest forms of travel (Holloway, 1983). The idea of the trip to the fixed site flourished during the Renaissance with the popularity of the spas and the seaside resorts (Holloway, 1983; Robinson, 1976). Its more modern manifestations are typically witnessed in the widespread demand for sun, sea and sand vacations. Originating during the same period as

the spas and seaside resorts, the 'once-over-lightly' tour has descended from 'The Grand Tour'. At that time, such a tour was considered an essential element of the education of young English ladies and gentlemen. They would spend a number of years exploring and absorbing the cultures of continental Europe (Holloway, 1983; Robinson, 1976). The modern day comparison has reduced the time spent on the tour from a couple of years to a couple of weeks. Hence, the term 'once-over-lightly'. The very rushed and very glossed over version of a once indepth appreciation of the countries and cultures involved has come to be recognized as the 'If it's Tuesday, this must be Belgium' syndrome.

Thus, traditional forms of travel provided the basis and beginnings of the modern mass renditions of the same. It is these renditions that have become stereotypical of package tours. What is not often realized, however, is that although these stereotyped forms of travel are prevalent, there is a whole host of variations beyond, as well as within, these options; some of which were described earlier in this chapter.

Although the wide range of options available have sufficed in the past, there have been two recent developments in the tourism industry that have put pressure on tour operators to produce package tours with still more diversity and variety. One of these developments is the public's ever expanding travel experience. The outcome of such experience can be that those who had been relying on the safety and security of package tours now have the knowledge and confidence to organize their trip

independently (Lundberg, 1974; Markham, 1985). The increased confidence has made it necessary for tour operators to expand their product geographically by producing tours to destinations as yet untravelled by the majority. These destinations are now few and far between and diminishing rapidly. There is evidence of the Soviet Union and mainland China slowly opening up to the travelling public and expectations that tourism to these areas will increase (Coates, 1985). But beyond these seemingly last frontiers, there are predictions that destinations will become man-made attractions (i.e., Canada's Wonderland or marine parks) (Turner and Ash, 1975). Or they will "...probably mean something to do, not just to see..." (Davidson-Peterson Associates, 1986: 31). If tour operators are to maintain their prominent status in the industry and with the public, they will have to adapt accordingly.

The other development compelling tour operators to update and diversify their product is deregulation of the airline industry. In the past package tours were the most economical way to travel because of the tour operator's position to buy in bulk at a cheap price and then pass the savings on to the tourist. With deregulation it has become possible for individual travellers to find and buy bargain air fares independently. Deregulation has generated a number of special reduced air fares such as the 'red-eye specials' or general seat sales, as well as the birth of such organizations as 'The Last Minute Club' that offer low-cost air fares for last minute purchases. Consequently, package tours are losing their

economic advantage. Tour operators are under pressure to produce packages that will be well worth the cost to the customers.

Rather than attempting to regain the economical value of the package tour for the individual tourist, the tour operator should perhaps be concentrating on the potential personal value of that package (Davidson-Peterson Associates, 1986; Travel and Tourism Consultants International, 1980). Personal value for these tourists seems to be emerging, of late, in the form of package tours catering to their special interests (Coates, 1985; Ferrario, 1986; Medlick, 1982; Sheldon, 1986). The emergence of this new trend may be in response to the criticisms of package tour travel and the new developments (increased travel experience and deregulation) within the industry as have been outlined here. There are, however, other factors that may play a role in the emergence of special interest tours as a new trend. These factors are introduced in the following section.

2.7 Conclusion

The tourism industry is a dynamic set of interrelated elements, one affecting another. This chapter has outlined some instances of change occurring in one of those elements (package tours) created by other elements (tourists and transport) within the industry. One specific change that the literature suggests is the need for, and emergence of, a new trend toward special interest package tours. This suggestion supports the research hypothesis which predicts an increase in such tours. In search

of possible causes and to further substantiate the hypothesis, this increase must be examined in the context of the broader society, as was suggested in Chapter 1. To that end, the conditions of the external environment and their potential connections with package tours, are described in the following chapter.

CHAPTER 3

THE BROADER SOCIETAL ENVIRONMENT AND PACKAGE TOURS

3.1 Introduction

An attempt to gain insight into the package tour has made it evident that it does not exist independently or in isolation. It cannot be separated and studied as a unique entity, but must be considered as one of a number of elements forming the tourism industry. But as package tours are subject to developments within the industry, so too are they subject to developments in the broader field of society. Tourism, like package tours, is a single component of a larger whole. Societal developments influence tourism activity and, consequently, package tour travel. It is therefore necessary to examine package tours in the context of this broader environment in order to fully understand and recognize the hypothesized trend of any other trend made evident by the research data.

To that end, this chapter reviews the relevant societal developments and their consequences. It reviews recent political and economic conditions. It reviews some of the major technological advancements of the recent past which have had, and continue to have, consequences for the restructuring of work and leisure patterns and lifestyles generally. And it reviews these conditions, advancements and consequences with specific reference to their impact on package tour travel.

The new technology and social values, although very critical factors affecting tourism both directly and indirectly, are not

the only factors with that potential. The questions addressed in this thesis are influenced by a wide variety of factors. Politics and economics are two more influential determinants of touristic movement. Political unrest or instability commonly constitute cause for the curtailment of touristic activities in affected areas. Even with relative stability, each particular governing body has the option and the prerogative of either promoting or restricting tourism development, according to what is deemed appropriate by that government for its lands and its people. In any case, the political situation can dictate the degree of tourist movement (Mihovilovic, 1980).

Similarly, the economic conditions of both the host and the generating countries can have an impact on tourist flows (Nash, 1979; Mihovilovic, 1980). For struggling Third World nations, often the only resource for revenue available to them is their natural environment, a resource required for tourism. If not properly planned, however, returns from tourism, far from remaining within these countries, can end up in the hands of foreign multinational corporations. Rather than respecting natural resources, tourism can ruin the physical environment it relies upon. Tourism can have detrimental effects on host regions.

Similarly, the economy of generating regions influences individuals' tourism decisions. Depressions, recessions and inflation are all important determinants of who goes where for how long and how. Over the years it has become evident that in economically difficult periods, tourism has not declined but has

simply experienced a slower rate of growth (EIU, 1976; Holloway, 1983). It has also become evident that in economically difficult times people will do without other goods and services rather than give up their vacation (EIU, 1976). In fact,

...the demand for tourism is not much influenced by the level of economic activity when people think that the downturn is likely to be temporary...in hard times it is clear that holidays are highly valued. Thus, tourism and leisure activities may be maintained by the use of savings and by foregoing expenditures on other items with a lower priority (Aviation and Tourism International, 1983: 12).

Politics and economics, then, do influence tourism. The dynamics of political actions and systems, and the continuous cycle of economic conditions, however, generally affect short-term situations and tourism activities favourably or unfavourably. In comparison, technological developments and social value changes have more of a long-term, uni-directional effect on society and tourism alike. The impacts tend to be more profound than passing.

Although technological developments are emphasized, attitudes and values also play a key role in this societal restructuring but are less easily and accurately definable. Often, the almost simultaneous occurrence of changes in each of technology and values makes it difficult to differentiate which is the cause and which is the effect. The most vital component of society, however, is the people. As such, it is their beliefs and values, and not technology, that determine the direction their society will take.

Scientific progress and invention however, as the primary or secondary instigator, can cause significant consequences in

contemporary societies. The invention of the steam engine totally revolutionized industry some three hundred years ago (Gill, 1985; Holloway, 1983). The consequences did not end with the reorganization of the industry, however. Entirely new work and leisure patterns emerged with new systems of production; new labour demands and consequently, new labour laws; and the distinction of leisure time (Gill, 1985). Although there have been many influential and consequential inventions before and since, there have been none so extensive and comprehensive as that which gave rise to the Industrial Revolution. The introduction of the silicon chip, however, is possibly producing as great, or potentially greater effects on society. As the steam engine was to the Industrial Revolution and society generally, so is the silicon chip to the age of modern technology (Gill, 1985). The silicon chip has computerized modern society. It is responsible for another reformation of the system of production. It is reducing labour demand, increasing leisure time, and generating new and appropriate lifestyles (Gill, 1985; Kabanoff, 1980).

Modern technology, as an element in society, has influenced the many, major changes that have occurred in society to date, some of which are pursued in this chapter as they pertain to package tours. The five 'reasons' for choosing package tour travel presented in Chapter 2, are reassessed in light of these recent technological advances, the corresponding value changes, and the subsequent societal restructuring. Due to this restructuring, it has been necessary for package tours, and the

tourism industry generally, to reevaluate their position and product and prepare for the emerging society.

3.2 Reasons for Participating in Package Tour Travel

3.2.1 Security/Safety

It was suggested in Chapter 2 that people need variety and a break from routine and this provided their incentive to travel. There was also, however, the counteracting force, fear of the unknown, with which to contend. A balance between these two opposites is being provided in package tour travel. Essentially this balanced relationship remains the same. What has changed is the connotations of some of the central concepts. What 'variety' and the 'unknown' mean to today's tourists is not quite the same as it was in the 1950's when modern mass tourism, quite literally, took-off. 'Variety' or 'a break from routine', then, could be found in almost any form of tourism. The activity itself was a novelty to tourism's new middle class participants. The 'unknown' was virtually everywhere but home. For the most part, these tourists had only read or heard about, and could only imagine the newly accessible destinations. Thus, these destinations and their inhabitants were, logically, perceived as distant, different and unknown (Crompton, 1979; McIntosh, 1977).

These novice travellers have, however, in the past thirty years given way to new generations of well-travelled individuals. People have grown to regard leisure, and travel as

a leisure activity, as a regular part of life (Aviation and Tourism International, 1983). The consequence has been a considerable increase in the level of travel experience among young and old alike. In fact, today's seniors are the first generation to have had the opportunity, as well as the income, to accumulate such extensive experience in travel. With an aging population structure and longer lives due to improved health and medical care, these seniors have introduced a new, large and growing market of experienced travellers (Mihovilovic, 1980; Papson, 1979; White, 1984). They have also served as role models of a lifestyle where travel is common, if not the norm, for younger generations.

The steady accumulation of travel experience over time is not the only factor promoting a general increase in the level of travel experience. There has been a trend toward higher education (Gill, 1985; Handy, 1984). "Education presumably broadens one's perspective, stimulates curiosity and, quite naturally, arouses an interest in travel..." (Lundberg, 1974: 109). Thus, education too has encouraged travel and expanded travel experience.

The two demographic evolutions described - an aging population accumulating travel experience with time and higher levels of education supposedly stimulating the desire for travel experiences - have been accompanied by evolutions in the concepts of 'variety' and the 'unknown'. 'Variety', to those with travel experience, implies more than just travelling or travelling to already familiar destinations, or places like

them. 'Variety' now means something substantially more exotic (Lundberg, 1974). It means doing new things in new places. The 'unknown' is an area shrinking in size. More and more destinations have been travelled and experienced and are, therefore, no longer 'unknown' or risky. No longer will traditional tours suffice. Package tours, to maintain their popularity with tourists seeking a balance between the exciting adventure that they want and the uncomfortable fear it may cause, need to incorporate the new connotations of these terms into the development of products for today's tourists.

The redefining of 'variety', the 'unknown' and the required levels of security and safety for package tour patrons is but one of the adjustments necessary as a result of changing societal conditions. There are a number of other developments occurring in society which have generated the need for similar such adjustments to package tours. These adjustments are revealed in the review of the remaining four 'reasons'.

3.2.2 Sociability: A New Process of Socialization

It was stated in Chapter 2 that humans are essentially social creatures and that this need for sociability can be met through package tours and the people that comprise them. If this need was indeed met in the past, package tours have a promising future ahead of them. If modern technology is redefining the world of work, it is also reshaping the process of socialization (Gill, 1985; Handy, 1984; Mingione, 1985).

The silicon chip or the micro-processor responsible for the

new technology has the capacity to computerize virtually all aspects of society excluding, perhaps, some personal services and nurturing (Gill, 1985). In the home, the computer can organize the household budget, keep a recipe registry or personal itineraries. It can also provide the opportunity to do self-employed or wage work from the home, thus saving on rental fees of offices and other such overhead (Gill, 1985). In the work place, manufacturing plants are becoming almost totally roboticized leaving only a few individuals for the specialized and isolated tasks of watching, servicing, or tending the equipment. Similarly, in the office, work is becoming almost completely centered around the computer terminals (Gershuny, 1978). In all cases, social contact is diminished considerably.

The Americans have a phrase, 'hi-tech needs hi-touch', meaning that the dehumanizing element of much of the new technology has to be compensated for by accentuating other ways of relating to people. People want to be with people. If we are locked into our computer terminals all day, in the home or the office, we shall socialize more intensively at night (Handy, 1984: 89).

Computer technology is not only dehumanizing, it also reduces the need for manual labour. It can be both more cost efficient and time efficient than its human counterpart. There is, thus, an inevitable reduction in, and possibly even the eventual and total replacement of, human labour in a wide variety of workplaces (Gershuny, 1978; Gill, 1985). On the other hand, there is expected to be an increase in the need for personnel with highly specialized and technical skills to maintain and operate the electronics as well as personnel in the service sectors (Gershuny, 1978; Handy, 1984; Mingione, 1985;

Pizam, 1982). These employment opportunities, however, will be far from capable of accommodating or compensating for all of the jobs lost in the other sectors (Handy, 1984). The unfortunate consequence of the implementation of the new technology, then, may be widespread unemployment (Mingione, 1985).

Unemployment, like computerized employment, causes social isolation (Gill, 1985). The work place has been the source for that essential social contact. But with the loss of the job and the "...withdrawal of individuals into a place of refuge (the family)...[or a] retreat into the 'private sphere'..." (Godard, 1985: 324), there is a search for new forms of social contact outside the work place.

Modern technology has, thus, restructured the work world in and around computer electronics. However, "it is unlikely that people will orient their lives completely around the computer, given that the human need for social contact with others is universal" (Gill, 1985: 6). It is also evident that there is a search for new sources of social contact to compensate for the loss of that in the work place. The home, community and leisure activities become those potential sources.

Package tours in the past have provided patrons with the sociability they anticipated. With the desire for social contact conceivably and considerably intensified, package tour demand, solely for this purpose, should increase.

3.2.3 Identity

Unemployment, as already mentioned, causes social & isolation. It also results in the loss of identity, social or otherwise (Gershuny, 1978). Work had not only provided a major source of social contact, it also influenced how an individual was perceived by others and by him or herself. "The status and identity of individuals in the wider society have been largely influenced by their occupation...our self-esteem and the opinion that others hold of us is measured almost entirely by what we do rather than what we are" (Gill, 1985: 168-169). Here, as was the case with 'sociability', individuals will need to search and find identity in activities other than work, including leisure activities. Package tour travel, as a leisure activity, has previously been portrayed as providing the opportunity for identifying with others and oneself. Tour operators should, therefore, have another reason to anticipate an increased demand for these services. A remaining question, discussed in Chapter 5, is: will these unemployed have the money to travel?

A similar situation applies to those people who have maintained employment. Their employment circumstances and conditions may have altered, changing their need for, or level of, soul searching (Pearce, 1982; Turner and Ash, 1975). What they are looking for in their leisure activities as a result of their dehumanising work world may be different. There are competing theories as to the relationship between work and leisure, but it is conclusively considered to be true that "...the uses of leisure relate, often quite deeply, to the

(nature and conditions of work..." (Parker, 1976: 43). The competing theories suggest that leisure activities either complement work activities (spill-over or extension theories), are contrary to work activities (compensatory or opposition theories), or are independent of them (neutrality theory) (Parker, 1976; Pearce, 1982).

It should be noted though, that leisure theories serve to describe people's activities in response to day-to-day work pressures. Travel behavior may well prove to have several distinct and unique properties from that of other leisure behavior because it may be seen as an infrequent, long-term and cumulative response to the work situation (Pearce, 1982: 20).

It is apparent, then, that more research needs to be done to determine exactly how work patterns might influence travel generally and package tours specifically. It also must be recognized, however, that there are more factors involved, over and above work activities which affect travel behavior and that must be taken into account. Package tours have already been depicted as allowing for, and contributing to, the discovery and development of identity. This capacity provides a solid foundation for package tour travel to build on. But to grow to potential it must consider new developments in the work world. It may be that an increasing dependence on, and dictation by, the new technology, will lead people to seek out and engage in leisure and travel activities offering the opportunity for more self-expression

3.2.4 Time

When the Industrial Revolution was at its peak, the average work week for the wage worker was approximately 80 hours. Since that time, there has been a steady decrease in those demanding hours. Wage work in industrialized countries now occupies somewhere between 35 to 40 hours per week and the hours are expected to continue to decline, reaching an average work week of 32 hours in the next few years (Mihovilovic, 1980; Pizam, 1982). Corresponding to this reduction in work hours is the predicted shortening of the work week from five days to four (Kabanoff, 1980).

Beginning with the granting of statutory holidays followed by the introduction of the paid holiday in the 1930s, the numbers of weeks worked per year have also declined. A more recent reason for the further reduction of the number of weeks or months worked in a year, results from modern technology. The permanent, long-term job guarantees previously prevalent are rapidly being replaced by part-time, shift work and short-term contracts, a consequence of an unstable work environment (Handy, 1984). There has been a new emphasis on the hiring of temporary, specialized personnel required for a particular job for a particular time period (Handy, 1984). There is also the movement toward the reduction and replacement of human labour by technology often necessitating the appropriate retraining of the remaining staff (Gershuny, 1978; Gill, 1985).

Yet another factor affecting the amount of time spent at

work, is the increased desire for a higher education. More people are spending more years in school and fewer years in the work force. Accompanying and complementing the shorter working life of individuals due to longer study periods, is a new emphasis on earlier retirement whether voluntary or obligatory (Handy, 1984; Mihovilovic, 1980).

The outcome of this gradual reduction of work hours, work days, work weeks and months, even work years, is the expansion of available leisure time (Gershuny, 1978; Mihovilovic, 1980; Papsen, 1979). As explained in Chapter 2 people were often too busy working to find time to thoroughly appreciate a travel destination or even to make the arrangements for the trip. Package tours were convenient. They were pre-packaged saving planning problems and providing a brief but adequate overview of the destination's characteristics. Conditions have evidently evolved such that, for a growing number of people, there is an abundance of time available to both personally plan and thoroughly acquaint oneself with the physical and cultural environment visited. The 'time' purpose of package tour travel is, thus, seriously threatened. Tour operators must try to develop, but not depend on, the dwindling demand for these services. They must also, however, take these new developments into consideration and diversify their product accordingly. This diversification might mean concentrating their efforts on the other purposes or 'reasons' behind package tour popularity. It may also mean producing a product providing travel to places and events that would be difficult and confusing to try to

coordinate without the advantages and connections available to, and through, tour operators.

3.2.5 Money

Disappearing jobs and job time have ensured that in the times ahead, "we shall tend...to have more time but less money..." (Handy, 1984: 8). Travel requires the availability of both time and money. Job loss, then, has produced two counteracting forces affecting the opportunity for travel. It has increased discretionary time but has, simultaneously, decreased discretionary income.

There have been a number of developments in the past few decades which have supplemented disposable dollar resources, beginning with the paid holiday and including an increase in real incomes over the years (Carlson, 1980; EIU, 1976; Holloway, 1983; Papson, 1979). For a while these supplements served their purpose. But with the changing nature of work and an economy in recession, alternative sources of income became essential in order to maintain an established level of subsistence (Mackenzie, 1985). One of these alternatives sent all employable members of the household out looking for jobs. This alternative generally involved the housewife searching for work with monetary pay and the consequent change in traditional male-female/husband-wife roles (Handy, 1984; Mackenzie, 1985). Other alternatives have included attempts at independent business, new enterprising and entrepreneurial endeavours initiated in and from the home, as well as efforts toward

enhanced self-sufficiency (Gershuny, 1978; Handy, 1984; Redclift, 1985). "More time and more accessible technological aids may allow everyone to be more self-sufficient, all doing for themselves what they had previously paid others to do for them" (Handy, 1984: 9).

People are necessarily becoming more and more budget-conscious. They are realizing the difficulty in finding and keeping employment. They are generating new ways of compensating for these economic complications witnessed in the entry of women in the work place and the emergence of 'home work'. Economic conservation has also been made possible by later marriages, smaller families and dual income households.

Although discretionary income is increasingly difficult to come by, the recently established annual vacation remains popular. Societal values have shifted such that travel and vacations are no longer a luxury for a few but expected by most. What is often the case in this increasingly leisure-oriented society is that people will sooner sacrifice in other areas in order to ensure some amount of travel time (EIU, 1976). It is also the case, however, that these same people will search and find the best travel bargains obtainable. For this reason, package tours will be in a better position to prosper than other forms of tourism. Package tours are established on an economy basis, thus providing that for which the contemporary, budget-conscious tourist is looking.

3.3 Manifestations of the Broader Environmental Developments in Package Tours

Society's acceptance of modern technological advances and its reorganization of the value system have given rise to the restructuring of that society. Modern technology has given rise to faster and more efficient transportation and communication systems that are shrinking the perceptual maps of the majority (Carlson, 1980; Papson, 1979). It has also given rise to new definitions of, and options for, 'work'. 'Work' now can refer to traditional wage employment with the variations as to part-time, shift or contractual agreements often based on specialized skills. Or, it can refer to small independent and/or cooperative enterprises, as well as the 'work' engaged in attempting to achieve some level of self-sufficiency. The new values have allowed this technological restructuring and together they have given rise to new lifestyles (Aviation and Tourism International, 1983; Gershuny, 1978). With more and more individuals retreating to, or working in and out of, the home, there is an increasing fusion between the previously distinct home and work place (Hoivik and Heiberg, 1980; Rabanoff, 1980; Mackenzie, 1985; Redclift, 1985). The increase in the amount and importance of leisure in today's society has similarly encouraged a fusion between leisure and work activities. People are now more apt to seek out activities in leisure or work that are self-fulfilling in order to fill the gap left when permanent, long-term employment began to disappear. The results of these fusions is a movement toward

lifestyles which integrate work and leisure (Gershuny, 1978; Handy, 1984; Hoivik and Heiberg, 1980; Pizam, 1982).

It has become quite clear that societal components, headed by value changes and modern invention, are very much interrelated. The changes occurring within leisure, as well as the other components, are necessarily effecting changes in tourism generally and package tours particularly. The tourism industry generally has become more efficient as a result of modern technology. Specifically this efficiency is a result of decreased travel time as well as "...improved communications equipment, better scheduling of routes, automated bookings via telecommunications networks, and automated ticket control" (Gill, 1985: 108). Package tours particularly have had to adapt to a society with new values and lifestyles and corresponding work and leisure patterns. This adaptation has meant attempting to satisfy new markets of more highly educated and well-travelled individuals; of more affluent yet more budget-conscious individuals; of young, childless couples and more seniors; or more single mothers and more women in general; of individuals used to more variety and options in the type of 'work' available to them and expecting the same in their leisure activities; and of individuals seeking fulfillment and identity in their leisure pursuits (Aviation and Tourism International, 1983; Carlson, 1980; Davidson-Peterson Associates, 1986; Medlik, 1982; Minister of State (Tourism), 1985).

The relevant conclusion is that times are changing, even in relation to leisure activities, and it will be unwise to rely too heavily on conventional structures. New times, and changing requirements, need new approaches and fresher ideas (Ferrario, 1986: 344).

No longer will traditional holiday packages suffice. There are a number of expected and developing trends changing the nature of tourism. There are more shorter vacations being taken per year; more people, particularly seniors, travelling farther for longer periods; load levelling is occurring taking the pressure off peak seasons; and the more educated and better travelled customers are demanding more variety, more options, better value, and more activity (Coates, 1985; Davidson-Peterson Associates, 1986; McIntosh, 1977; Minister of State (Tourism), 1985; Travel and Tourism Research Association (TTRA), 1985; Markham, 1984).

The tourism literature has stressed that what is required of package tours is to satisfy these new market demands through a shift away from traditional types of tours and toward geographic or product specialization (EIU, 1976; White, 1984).

A specialized factor is one that cannot easily be duplicated. [It is] the knowledge of different destinations and their facilities, the knowledge and ability to create special interest tours (such as historic, adventure, or archeological tours)...—(Sheldon, 1986: 359).

Special interest tours do not cater to large groups as do the Inclusive Tour Charters (ITCs). They cater to specialized groups of people and cannot, therefore, provide the same profit margin as ITCs can (EIU, June, 1971). In an industry experiencing a high level of vertical as well as horizontal integration, a predominance of a small number of large operators, and a general instability of a great many smaller operators, there are two ways of making special interest tours work. First, for the large tour operators, they can offset the

small profit operations with the continued operation of the larger profit ITC's (EIU, June, 1971; Holloway, 1983; Sheldon, 1986). Secondly, the smaller, unstable firms can specialize in the product offered and, thus, develop a niche in the market and achieve better odds of survival (Sheldon, 1986).

Although special interest tours, by their very nature, cannot produce the large profits per tour desired, in the long run it is the more profitable alternative. Those operators who neglect this new demand will find they have left themselves out of a very substantial market (White, 1984). The tour operator has to differentiate between a passing fad and a long term value change, such as that discussed herein, and act accordingly (Carlson, 1980). Although neither situation should be overlooked, it would be far more detrimental to that tour operator to slight a major societal adjustment.

Recent literature suggests the need for the development of and, in a few instances, the existence of the specialized product; a product which should provide a higher degree of involvement on the part of the experience-seeking tourists in the activities included (Mihovilovic, 1980).

The research carried out and described in the following chapter sets out to examine these trends. Specifically, it sets out to determine if there is an increase in the number of special interest tour operators in existence of late. It also sets out to determine exactly how the changing values, advancing technology and the changing nature of work have affected package tours and if these changes have in some way influenced the

special interest, our trend or any other trends that may become evident in the research data. Before these questions can be answered, it is first necessary to describe the methods of research employed and the procedures followed. This description is the purpose of the next chapter.

CHAPTER 4

METHODOLOGY

4.1 Context of Thesis Research Questions

The review of tourism and related literature has, thus far, established that there has been substantial and steady growth in tourism and that this growth has been influenced by various interrelated internal and external elements. It has been argued that modern technology and new social values have been of particular significance in influencing changes in society as a whole and tourism more specifically. Society's work patterns and corresponding leisure pursuits, its attitudes, values and lifestyles have all been altered as a consequence. The tourism industry has increased in efficiency in response to greatly improved systems of transportation and communication, and in popularity in response to the emerging leisure society.

The many intricate relationships between package tours and the surrounding social, economic, political and technological situations described thus far in the thesis, provides the context within which the specific research questions were formulated and explored. A need for, and observation of, more tours catering to special interests has been suggested in the literature reviewed. Is this, in fact, a developing trend? Is it a result of these recent conditions and developments? Are there other trends developing coincidentally?

The research described and analyzed in this thesis attempts to answer these questions based on the data in this thesis from

Ontario sources. Although it would have provided a more solid data base, research encompassing all of Canada was beyond the time and monetary budget of the researcher. Thus, the scope of the research was limited. Specifically, it was limited to the province of Ontario for the following reasons: 1) Of the 463 Canadian tour operators listed in the Personnel Guide to Canada's Travel Industry: Spring/Summer 1986 (Canadian Travel Press), 234 are located in Ontario; 2) Ontario is home to Toronto, Canada's most populous urban center (Tables 4.1 and 4.2) providing the largest market for the tour operator product as well as printing two of the most widely distributed newspapers (and, thus, sources of package tour advertisements) in Canada, namely The Toronto Star and The Globe and Mail (Table 4.3); 3) The province of Ontario has the highest population density, urban or rural (Tables 4.4 and 4.5) to consume these newspapers' advertisements and to, subsequently, be the best possible representation of Canada as a whole; and 4) Ontario is home to Tourism Canada's Tourism Research and Data Center located in Ottawa and providing a plethora of statistics and tourism data.

Two research methods were employed to obtain the primary data desired, and to discover any developing package tour trends and their corresponding causal factors. These methods are a content analysis of newspaper travel advertisements and a survey of tour operators.

These two methods were chosen as complementary sources of data. The content analysis was employed to provide objective evidence of the subjective opinions offered in the surveys.

Table 4.1: Population of Capital Cities, Selected Census Years

City	1961	1974	1976	1981
St. John's, Nfld.	61,633	88,102	86,576	73,770
Charlottetown, PEI	18,318	19,133	17,063	15,282
Halifax, NS	92,511	122,035	117,882	114,594
Quebec, Que.	171,979	186,088	177,082	166,474
Toronto, Ont.	672,407	712,786	633,318	599,217
Winnipeg, Man.	265,429	246,246	360,874	564,473
Regina, Sask.	112,141	139,469	149,593	162,613
Edmonton, Alta.	281,027	438,152	461,361	532,246
Victoria, BC	54,941	61,751	62,551	64,379
Whitehorse, YN	5,031	11,217	13,311	14,814
Yellowknife, NWT	*	6,122	8,256	9,483
Ottawa, Ont.	268,206	302,341	304,462	295,163

*Incorporated after June 1, 1961

Source: Canada Yearbook, 1985.

Table 4.2: Population of Census Metropolitan Areas, Census Years

Census Metropolitan Area	1961	1966	1971	1976**	1981**
Calgary	279,062	330,575	403,319	471,397*	592,743
Chicoutimi-Jonquiere	127,616	132,954	133,703	128,643	135,172
Edmonton	359,821	425,370	495,702	556,270*	657,057
Halifax	193,353	209,901	222,637	267,991	277,727
Hamilton	401,071	457,410	498,523	529,371	542,095
Kitchener	154,864	192,275	226,846	272,158	287,801
London	226,669	253,701	286,011	270,383	283,668
Montreal	2,215,627	2,570,982	2,743,208	2,802,547*	2,828,349
Oshawa			120,318**	135,196	154,217
Ottawa-Hull	457,038	528,774	602,510	693,288	717,978
Quebec	379,067	436,918	480,502	542,158	576,075
Regina	113,749	132,432	140,734	151,191	164,313
Saint John, NB	98,083	104,195	106,744	112,974	114,048
St. Catharines-Niagara	257,796	285,453	303,429	301,921	304,353
St. John's, Nfld.	106,666	117,533	131,814	145,400*	154,820
Saskatoon	95,564	115,900	126,449	133,793*	154,210
Sudbury	127,446	136,739	155,424	157,030	149,923
Thunder Bay	102,085	108,035	112,093	119,253	121,379
Toronto	1,919,409	2,289,900	2,628,043	2,803,101*	2,998,947
Trois-Rivieres				106,031	111,453
Vancouver	826,798	933,091	1,082,352	1,166,348	1,268,183
Victoria	155,763	175,262	195,800	218,250	233,481
Windsor	217,215	238,323	258,643	247,582	246,110
Winnipeg	476,543	508,759	540,262	578,217	584,842

* Based on 1981 census metropolitan area

**Adjusted due to boundary changes.

Source: Canada Year Book 1985.

Table 4.3: Circulation Figures Presented in the March 1986
Publisher's Statements for Canada's Largest
Newspapers

Newspaper	Circulation Figures
The Vancouver Sun	285,478
Times-Colonist (Victoria)	77,425
Calgary Herald	141,086
The Calgary Sun	73,616
The Edmonton Journal	174,734
The Edmonton Sun	84,516
The Leader Post (Regina)	72,657
Star Phoenix (Saskatoon)	62,622
Winnipeg Free Press	241,033
The Winnipeg Sun	43,533
The Hamilton Spectator	142,606
The London Free Press	128,695
The Ottawa Citizen	239,070
The Globe and Mail (National edition)	319,162
The Globe and Mail (Toronto edition)	189,882
The Toronto Star	815,902
The Toronto Sun	276,618
The Windsor Star	87,201
The Gazette (Montreal)	272,624
Le Journal de Montreal	369,452
La Press (Montreal)	323,170
Le Journal de Quebec	111,559
Le Soleil (Quebec)	143,898
The Telegraph-Journal (Saint John, N.B.)	63,264
The Chronicle-Herald (Halifax, N.S.)	80,187
Telegram (St. John's, Nfld.)	54,889

*Note: The above figures represent "average paid" numbers of newspapers per day. Specific Saturday figures were given when available.

Source: Summarized data from Canadian Advertising Rates and Data, Dec. 1986, pp. 2-28.

Table 4.4: Population Summaries, Selected Years (Thousands)

Province or Territory	1961	1971	1976	1981	1983*
Newfoundland	458	522	558	568	576
Prince Edward Is.	105	112	118	123	124
Nova Scotia	737	789	829	847	858
New Brunswick	598	635	677	696	705
Quebec	5,259	6,028	6,234	6,438	6,515
Ontario	6,236	7,703	8,264	8,625	8,800
Manitoba	922	988	1,022	1,026	1,045
Saskatchewan	925	926	921	968	991
Alberta	1,332	1,628	1,838	2,238	2,345
British Columbia	1,629	2,185	2,467	2,744	2,818
Yukon	15	18	22	23	22
Northwest Terr.	23	35	43	46	48
Canada	18,238	21,568	22,993	24,343	24,848

*April 1983, preliminary estimates, other years, Census of Canada.

Source: Canada Year Book, 1985.

Table 4.5: Urban and Rural Population, Canada and Provinces, 1981

Province or Territory	Rural				Total Population No.
	Urban No.	Non-Farm No.	Farm No.	Total	
Newfoundland	332,898 (58.6)	232,858 (41.0)	1,925 (0.4)	234,782 (41.4)	567,681
Prince Ed. Is.	44,515 (36.3)	65,976 (53.9)	12,015 (9.8)	77,991 (63.7)	122,506
Nova Scotia	466,842 (55.1)	362,919 (42.8)	17,681 (2.1)	380,600 (44.9)	847,442
New Brunswick	353,220 (50.6)	328,211 (47.1)	14,972 (2.2)	343,383 (49.3)	696,403
Quebec	4,993,839 (77.6)	1,258,202 (19.5)	186,362 (2.9)	1,444,564 (22.4)	6,438,403
Ontario	7,047,032 (81.7)	1,298,249 (15.1)	279,826 (3.2)	1,578,075 (18.3)	8,625,107
Manitoba	730,659 (71.2)	199,188 (19.4)	96,394 (9.4)	295,582 (28.8)	1,026,241
Saskatchewan	563,166 (58.1)	224,892 (23.2)	180,255 (18.6)	405,147 (41.8)	968,313
Alberta	1,727,545 (77.2)	319,424 (14.3)	190,755 (8.5)	510,179 (22.8)	2,237,724
British Col.	2,139,412 (78.0)	545,400 (19.9)	59,555 (2.2)	605,055 (22.1)	2,744,467
Yukon	14,814 (64.0)	8,335 (36.0)	4	8,339 (36.0)	23,153
Northwest Terr.	21,985 (48.1)	23,749 (51.9)	7	23,756 (51.9)	45,741
Canada	18,435,927 (75.8)	4,867,403 (20.0)	1,039,851 (4.3)	5,907,254 (24.3)	24,343,181

*Figures in brackets are percentages

Source: Canada Year Book 1985.

Conversely, the survey data was used to further, and to more directly substantiate, the findings of the content analysis. Each method is discussed in detail below.

4.2 Content Analysis of Newspaper Travel Advertisements

Content analysis in search of trends, as in this instance, is also recognized as trend analysis. "A trend refers to the increase or decrease of the frequency of given symbols (or content) over a period of time" (Budd, Thorp and Donohew, 1967: 60). Records of old newspapers retained on microfilm provide a source to be reviewed over an extended period, thereby determining the existence of a trend. The travel advertisements, although not indicative of tours taken, are reasonably representative of tours offered. A comparison over time of the travel advertisements in the newspapers, then, should prove illustrative of potential trends in supply, if not in demand.

The newspapers used for the content analysis in this research are The Toronto Star and The Globe and Mail, two widely distributed newspapers both within the province of Ontario and beyond its borders. The Toronto Star has the highest distribution figures of any Canadian newspaper. As more people buy the newspaper, it can be suggested that more people will read and respond to the travel advertisements within. The Toronto Sun, another major Ontario newspaper, was considered but as its distribution was less extensive and its travel advertisements and readership were essentially equivalent to The

Toronto Star, The Toronto Star was retained as the better alternative. The Globe and Mail, on the other hand, as a newspaper supposedly directed at and read by a more business oriented group of people rather than the more extensive general public readership of The Toronto Star, was not expected to exhibit a great deal of overlap in its travel advertisements as compared with the advertisements in The Toronto Star. The inclusion and utilization of The Globe and Mail as a second source provides a broader and more diverse sample of potential readers and diminishes the possibility of bias in the sample.

The Toronto edition of The Globe and Mail newspaper was the resource reviewed, as opposed to the national edition. The national edition of the newspaper has only been in print since 1980, excepting the "Report on Business" section which has always been national (personal communication, The Globe and Mail, July 10, 1986). In consideration of the fact that detecting a trend requires a longer period of time and that consistency in research is an asset, the more established Toronto edition was used throughout.

The travel section of both newspapers has regularly and routinely been found in the Saturday editions. Although there may be travel advertisements on other days of the week, the Saturday travel section provides a concentrated and consistent representation of the available products.

In addition to determining on which day of the week to best execute the content analysis, it was necessary to define which years to analyze as well as how often during each of those years

the analysis should be carried out. Newspaper travel advertising seems to present two peak seasons just preceding both the summer and winter peak vacation periods. To include samples of both seasons, one Saturday in each of these two peak advertising periods were chosen to best represent that year's products. The pre-summer season stretches from late April through May and June, and the pre-winter period covers November and December. The specific Saturday selected was decided upon according to volume. The more travel advertisements, the more representative the sample. The number of pages comprising each of the Saturday travel sections in the specified months were added up and the week with the highest total was chosen for an extensive content analysis. The procedure outlined was performed for both of the newspapers in question. For the most part, the two papers had corresponding high quantity dates, but for those few dates that differed, the week of the greatest combined total was singled out.

In summary, two Saturdays per year, once in each of the two aforementioned seasons and in each of the two newspapers were thoroughly analyzed as to content. The exact years to be reviewed were then determined. To identify a trend, a yearly analysis was not felt to be necessary and, in fact, it was felt that it might make the trend more difficult to discern. Periodic checks for content can be quite conclusive. The contemporary version and understanding of tourism grew out of, and with, the domestic use of the aircraft beginning in the post-war period, a period thus selected as a starting point.

Years reviewed regularly from that time period to the present should produce the desired results. The years selected were set at ten year intervals starting with 1955 and including 1965, 1975 and 1985, thus providing a manageable yet significant sample.

The data for the content analysis, then, were accumulated from sixteen separate Saturday travel sections, two in each of four years and from two different newspapers. A list of the dates analyzed for their travel advertisement content and their page totals is presented in Table 4.6.

Table 4.6: Dates and Page Totals for the Saturday Travel Sections Analysed for Content

Year	Date	Newspaper	No. of pages of ads
1955	Sat., May 4	<u>The Globe and Mail</u>	2.3
		<u>The Toronto Star</u>	3
	Sat., Dec. 10	<u>The Globe and Mail</u>	4
		<u>The Toronto Star</u>	3.6
<hr/>			
1965	Sat., April 24	<u>The Globe and Mail</u>	9
		<u>The Toronto Star</u>	6
	Sat., Nov. 13	<u>The Globe and Mail</u>	11
		<u>The Toronto Star</u>	5
<hr/>			
1975	Sat., May 10	<u>The Globe and Mail</u>	8
		<u>The Toronto Star</u>	18
	Sat., Nov. 29	<u>The Globe and Mail</u>	6
		<u>The Toronto Star</u>	15
<hr/>			
1985	Sat., May 4	<u>The Globe and Mail</u>	19
		<u>The Toronto Star</u>	22
	Sat. Nov. 9	<u>The Globe and Mail</u>	22
		<u>The Toronto Star</u>	31
Total Sample			16

Source: The Globe and Mail and The Toronto Star.

The actual content analysis was then carried out. There were two more steps in this process. First, categories of content were selected from the advertisements involved, and second, each category's frequency was determined. The selection of the categories took into account the fact that "...the categories should be chosen according to the nature of the content, the research problem and its goals, and the hypothesis tested" (Budd, Thorp and Donohew, 1967: 47). The categories, therefore, were not concrete or pre-determined but variable and subjective.

Before categories depicting tour type could be outlined, it was first necessary to amass the raw data from the travel advertisements and then to determine the type of tour being promoted. The following categories were formed from the raw data collected and used to determine the second set of categories which follow. (Sample advertisements can be found in Appendix 3.)

1) The organization - this category includes the establishments promoting their product whether it be the tour operators, the travel agents, the transportation companies or governments (city, state, province, region, country).

2) The key words or emphasis - this category takes into account those words or phrases which are most boldly displayed or repeated and which are generally the aspects of the package tours that the organization is trying to promote or sell. The range of possibilities in this category are extensive. The organization may be attempting to advertize itself, its quality

of service, the advantages of the transportation, or the particular elements of its products such as the destination(s), the added extras, the price, or the type of experience that can be expected (i.e., escorted, adventurous, comfortable).

3) The destination(s) - this category lists all destinations mentioned in the advertising.

4) The transportation - this category outlines the transportation methods mentioned, if any.

The essence of the advertisements was more easily identified, interpreted, and reorganized into new categories more plainly pertinent to the primary purpose of the analysis (to establish whether there was a trend toward more special interest tours) with the raw data from the travel advertisements collected and collapsed into the categories outlined above. The new categories, of which there are two, are based on: 1) the type of tour promoted; and 2) the descriptors used to promote it (Table 4.7).

The information necessary to distinguish 'tour types' was not plainly printed in the text of the advertisement but determined by the combination of data from the four original categories. Nor are the actual 'tour types' themselves a given. They, like the other categories outlined, are designed and chosen for the purpose at hand. The 'tour types' adopted for this analysis were kept broad, general and consistent with an earlier discussion of tour types in Chapter 2, thus avoiding any undue complications. In the 'tour types' category, then, are: 1) the once-over-lightly tour - where a number of places

Table 4.7: Description of the Elements of the Research Categories

'Tour Types':

Once over lightly = number of places on one trip; countries or continents, province or state if tours suggested; regions (i.e., Rockies, Great Lakes); world cruises.

Fixed site = sun spots; cities; resorts; Caribbean Islands; cruises other than world cruises and not including cruises for the purpose of transport.

Special interest = theme, activity, interest, 'adventure' oriented or hobby specific.

General = offers variety of types in ad; no specific tour type or destination mentioned.

'Descriptors':

Budget = budget, value, save, free, all inclusive, general price listings, charters, deals.

Pleasure = pleasure, fun, leisurely, enjoy, happy, luxury, quality.

Exciting = exciting, fascinating, experience, discover, adventure, wilderness, exhilarating, exotic, thrilling.

Planned = planned, escorted, conducted, pre-arranged, guided.

Others:

Transportation = ads promoted by the transportation companies not advertising a particular tour type but the transportation itself.

Government = all advertisements put out to promote that government's region of responsibility (i.e., state, province, region, country).

Source: The Globe and Mail and The Toronto Star.

are visited on the same tour, and where countries and continents are mentioned generally (i.e., key words "escorted tour"; destination: "Europe"); 2) the trip to the fixed site - which includes resorts (i.e., Club Mediterranee), specific regions or cities, specific islands, sun, sea and sand spots, and sea cruises. In the case of cruises, the cruise ship becomes the fixed site. Those cruises whose primary purpose was transportation which were not counted in this category; 3) the special interest tour - where the trip is oriented toward specific themes, hobbies, interests and adventures; 4) general - where a single or specific tour type could not be determined (Table 4.7) (Appendix 3).

The 'descriptors' category was created and retained to support the results found under 'tour types'. The descriptors are adjectives describing the type of experience that can be expected from the tour taken and often correlate quite closely with the actual tour type. The descriptors were also expected to be useful in pointing out any trends occurring beyond tour type popularity. The 'descriptors' category and their equivalent adjectives are: 1) budget - save, value, all-inclusive, general price listings, charters, deals; 2) pleasure - fun, leisurely, enjoy, happy, quality, luxury; 3) exciting - fascinating, experience, discover, adventure, wilderness, exhilarating, exotic, thrilling; 4) planned - escorted, conducted, pre-arranged (Table 4.7) (Appendix 3).

Each advertisement analysed may or may not have established a 'tour type' and it may or may not have 'descriptors'. If the

advertisement has one or the other or both, they are counted in the sample. If there is more than one 'descriptor' in a single advertisement, which occurs rather infrequently, all are included. But only one tour type was counted per advertisement. Advertisements found in the specific Saturday travel sections but not categorized with the other data include: hotel, motel or cottage ads; rent-a-car ads; travel hotlines or clubs; park and fly ads; or audio-visual presentation ads. The advertisements were not in any way related to tour packages so were not considered relevant to this content analysis. And a last qualification, the advertisements of the transportation companies not promoting any sort of package tour and the government ads not offering any 'tour type', provided 'descriptors' only.

The categories or 'symbols' for the analysis have, thus far, been described. The frequency of those 'symbols' remains to be determined. The number of times each of the 'tour types' or 'descriptors' appeared were totalled for each Saturday in each season in both newspapers for all of the four specified years. The frequency in numbers as well as percentages were tabulated and graphically displayed in histograms. The results of the content analysis are presented in Chapter 5.

4.3 Survey of Ontario Tour Operators

The second research method employed to test the hypothesis of this research is a survey of Ontario tour operators. It is the tour operators who should best be able to describe the

changes in the supply and demand of their products over time. It is they who are most likely to be aware of a trend toward special interest tours and the contributing causal factors. Thus, with the aid of the Personnel Guide to Canada's Travel Industry: Spring/Summer 1986 (Canadian Travel Press), the province's tour operators were asked to respond to a survey. Although this personnel guide was the most complete listing available, it must be remembered that the tour operator element of the industry is characterized by instability. These companies can come and go rather rapidly, making it difficult to maintain an accurate account of them. Thus, the results will be unavoidably biased towards those whose names appear on the list.

Earlier in this chapter, it was mentioned that there was a large percentage of Canadian tour operators with head offices in Ontario. The relevant statistics for the province, as well as Toronto and area, are available in Table 4.8.

Table 4.8: Selected Totals and Percentages of Head Office
Locations of Canadian Tour Operators

Region	No. of Tour Operators	% of Total
Metropolitan Toronto	175	38%
Census Metropolitan Toronto	188	41%
Ontario	234	51%
Canada	463	100%

Source: Canadian Travel Press, spring/summer, 1986.

All of the 234 Ontario based tour operators listed were surveyed using one of two methods: interviews or mail-back questionnaires. Although the mail-back questionnaire is typically characterized by a low response rate, it was considered the most efficient method of obtaining data from such a dispersed group. The interviews were included primarily to provide a means of developing and refining the questions later to be mailed out. They also enhanced the information acquired from the impersonal questionnaire. Developing the questionnaire included a pilot test carried out through personal interviews, more extensive interviews, a preliminary questionnaire design, a pilot test of that format, and finally the resulting questionnaire which was then mailed out (Appendix 2). Both the interviews and the questionnaire are discussed in more detail below.

4.3.1 Verbal Interviews of Selected Tour Operators

The interviews planned were personally conducted in the Toronto area. Toronto was chosen as it was able to provide the broadest range and sample of tour operators in one accessible center. Before travelling to Toronto, however, preliminary interviews were arranged with three of the nine listed local Ottawa tour operators as a pilot test. The three were Ottawa Valley Tours, Travac Tours, and Voyageur Travel Services. These tour operators were chosen by going through the listing, calling each and interviewing the first three. The purpose of these preliminary interviews was to provide a practical understanding

of the interview process itself as well as an idea of the numbers and kinds of questions that needed to be asked. There was no pre-established itinerary for these interviews other than an explanatory introduction outlining the reason for the research and the interview. The intent was to find out what sort of information these tour operators had to offer without leading them with specific questions.

The open-ended approach applied in these preliminary interviews proved acceptable and even advantageous and was followed with the addition of a few formal questions for the interviews to follow in Toronto. The specific questions added asked for details concerning company and client data that were not offered by the three tour operator representatives in the pilot test but were necessary for the research. Information regarding the age of the company and the type of package(s) produced was sought. Both of these factors greatly influenced all of the comments to follow. If the company was only a couple of years old, it would be difficult for its representative to recognize and remark on long-term trends in supply and demand. If the company dealt exclusively or primarily with any particular package tour type, the comments are likely to be concerned most with that factor of the industry.

The questions regarding the client were demographic in nature and were searching for trends or links between the tourists and the packages they purchase. Other questions asked for general comments on how package tours had changed over the years and why, and how package tours might change in the years

ahead. Above and beyond these questions, the representatives were free to offer any information they thought was related and relevant.

The interview content was thus prepared for the Toronto tour operators. Ten interviews of Toronto area tour operators were seen as sufficient for research purposes and were possible within the one week's time available to the researcher. In order to ensure a broad sample of diversely oriented operators, the ten companies were selected according to either the age and size of their establishment or the particular type of tours they offered, or both. Letters were sent to each of the ten tour operators informing them of the researcher's intents and purposes and days expected in Toronto, and requesting their assistance (Appendix 1). Telephone calls were made to arrange appointments with the representatives once in Toronto. Three of the selected tour operators were unable, for a variety of reasons to entertain the request for an interview. Due to time constraints, only two alternatives were found both of whom agreed to answer any questions on the telephone but could not arrange a meeting in person.

The final nine tour operators, American Express Canada, Inc., Blyth & Company, Butterfield & Robinson, CP Air Holidays (recently merged with Treasure Tours), Goliger's Tours, Intervac (whose branch office only is in Toronto), and Thomson Vacations, were interviewed personally and Adventure Tours and Canadian Friendship Tours were interviewed over the telephone. These interviews, along with the three Ottawa interviews, were all

included in the research and analysis. (Reference details of the personal communications can be found at the end of the Bibliography.)

4.3.2 Mail-Back Questionnaire of Ontario Tour Operators

Throughout the interview process, the questions for the questionnaire were being formulated and reformulated so that with the last interview, the questionnaire simply needed to be arranged into an acceptable format and mailed out. The questionnaire included the specific questions already mentioned along with some more detailed inquiries as to destination, transportation, and variety of content in packages. Questions regarding potential causal factors for any changes suggested or described were added. To avoid wording the questions in such a way as to lead the respondents, a number of factors were simply listed with instructions for the respondent to comment on their effect on the industry. Also in keeping with the interview format, plenty of space was left for any additional comments. (A copy of the questionnaire is found in Appendix 2.)

As with the interviews, three different, randomly chosen, local Ottawa tour operators were personally approached in order to conduct a pilot test for the questionnaire. These tour operators were asked to comment on the questionnaire's design, its format, the clarity and relevance of the questions or any other element of it as they thought necessary. The three tour operators involved were: B & W Tours, Greater Heights Mountain

Adventures and Iberica Travel. There were no criticisms and only one minor suggestion that an "other" category be added to one of the causal factor lists. After careful consideration, it was decided that the 'comments' section or a related question on the following page could provide the opportunities needed to add 'other' elements. Consequently, the questionnaire was considered satisfactory and sent out. It was mailed, along with a covering letter of explanation and a self-addressed, stamped return envelope, to all of the listed tour operators in Ontario other than those already interviewed but including the three representatives who had commented on the questionnaire. The total number of questionnaires mailed out was 223.

In reference to the response, eight questionnaires were returned marked "moved" or "out of business"; four were returned unanswered; and forty-three were completed and returned. Reminder notices were considered as a means of improving the low response rate but as the questionnaires were confidential, it was impossible to know who had not yet responded in order to send them the notices. No follow-up was attempted and the response rate stands at forty-three (19%).

The frequency of the responses to both the closed and open-ended questions was ascertained, total numbers and percentages were accumulated and the results were tabulated where possible. But, as the comments are often more qualitative than quantitative, so, too, is the analysis of the results.

4.4 Summary of the Research Methodology

The analysis of the research, then, is based on twelve interviews, ten personal and two telephone, forty-three completed questionnaires, and sixteen separate Saturday travel sections. The use of the two research methods employed did prove to be complementary as was expected. The information obtained and time period considered overlapped. Each, however, provided unique information. The content analysis allowed for a longer time frame to be reviewed thus providing an overview of the package tour situation over time. The survey of tour operators provided more direct and up-to-date information and included speculation on future trends. The results of these research methods are presented in the following chapter.

CHAPTER 5

ANALYSIS

5.1 Introduction

The research described in the preceding chapter was conducted to determine the validity of the hypothesis set out in Chapter 1. Specifically and primarily it was conducted to determine if there is a growing demand for and supply of special interest package tours. Once determined, this developing trend, or any other potential trend, was to be considered in the context of the external environment. Before it is possible to either confirm or disprove the hypothesis and identify relationships, it is necessary to present the research data and analyze the results. It is the intent in this chapter to examine first, the data found from the content analysis of the travel advertisements, second, that from the surveys of tour operators, and third, the combined data sets to draw overall conclusions.

This chapter will also discuss whether the results substantiate the package tour situation specified and suggested in the literature reviewed in Chapters 2 and 3. The literature in Chapter 2 describes recent developments that have had, or should have, an effect on package tour design. Airline deregulation was said to be causing a reduction of fares and of regulations on time restrictions. It was also suggested that an increasing number of well-travelled individuals in a growing industry is producing more demand for new destinations, new

experiences and variety generally. Chapter 3 reviews literature which describes the conditions of the political, economic, technological, and social environments. It suggests that a major societal transformation is occurring. New values and new technology are leading the way to a new emphasis on leisure and new ways and forms of work. It is expected that there will be evidence of these developments and their consequences for package tours in the data analyzed in this chapter. Specifically, it is expected that such developments and consequences have produced the increase in special interest tours hypothesized and that this will be made apparent by the analysis.

5.2 Content Analysis of Newspaper Travel Advertising

The key words and ideas noted in the newspaper travel advertising over the thirty year period of study should show the trend or trends that have developed through the period of modern mass tourism. The most recent year analyzed (1985) should show a shift in emphasis appropriate to the developments mentioned above.

The data gathered from the content analysis are grouped into sections. The first section analyzes the advertisements generally; their numbers from year to year, from season to season and from newspaper to newspaper. The second section describes the number and type of destinations attended and any changes therein. The third and fourth sections review the 'descriptors' and the 'tour types' respectively over time,

between seasons and between newspapers. The data are then summarized and their relevance to the research described.

The advertisement and destination totals are both expected to support the literature describing tourism as a growing industry. It was suggested earlier that this growing industry has produced an increasing number of well-travelled individuals who are demanding something more and something different. It was also suggested that that something was taking the form of special interest package tours. It is also expected, therefore, that these totals indirectly provide support for the research hypothesis. Similarly, it is expected that the 'descriptors' indicate an increase in adjectives that would correspond to the new needs for something different and ultimately to the increase in special interest packages. More direct evidence is expected from the 'tour types' data. The results should indicate specifically that there is, in fact, an increase in these tours, thus confirming the hypothesis.

5.2.1 Newspaper Travel Advertising Deviations and Frequency

This section describes any deviations that may have occurred in the sample sizes causing deviations in the results of the content analysis generally. It also describes any trends found in the frequency of the travel advertising over the study period.

As was evident in Table 4.6, there has been an overall increase in the number of pages comprising the Saturday travel sections of both The Globe and Mail and The Toronto Star over

the thirty year period in question. Correspondingly, there has been a steady increase in the actual size of the advertisements as well as in the total numbers of advertisements in each of those travel sections. The figures representing those total numbers are tabulated in Table 5.1 and graphically displayed in Figure 5.1

Tables 4.6 and 5.1 and Figure 5.1, however, all illustrate a slight deviation from the overall escalation of advertising. The 1975 summer and winter Globe and Mail samples decreased slightly from the previous year's samples, and in contrast to its Toronto Star counterparts. In fact, the page totals for The Toronto Star samples for that same year more than doubled those of The Globe and Mail. Although the reason for the smaller Globe and Mail travel sections is not known, it is necessary to point out the deviation as it influences the results described in the sections to follow.

The amount of advertising, then, has consistently increased over the study period with the exception of the deviation described above. If the amount of advertising can be seen to portray overall awareness and interest in tourism, then the aforementioned increases support the descriptions and predictions outlined in the literature of a growing travel industry. They support the description of tourism as an activity catering in the past to a small minority but now available to a large majority. They support the description of the phenomenal growth the industry has experienced since the end of World War II. They also support the prediction that tourism

Table 5.1: Total Number of Travel Advertisements Analyzed in
The Globe and Mail and The Toronto Star Travel
 Sections in the Years 1955, 1965, 1975 and 1985.

<u>The Globe and Mail</u>					<u>The Toronto Star</u>				
Year Season	1955	1965	1975	1985	Year Season	1955	1965	1975	1985
Summer	20	37	22	62	Summer	18	27	66	82
Winter	18	24	12	65	Winter	14	14	53	91

Source: The Globe and Mail and The Toronto Star Saturday Travel
 Sections for May 14 and December 19, 1955; April 24 and
 November 13, 1965; May 10 and November 29, 1975; May 4
 and November 9, 1985.

Figure 5.1: Total Number of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star Travel Sections in the Years 1955, 1965, 1975 and 1985

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1966; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985.

is growing to become a more significant industry in Canada. As a part of that industry, it is expected that package tour participation and production will also grow. It is also expected that, as more and more package tours are produced, there will be a growing need for the tour operator to offer something different in order to compete in the market. It may be, in part, as a result of this need that the hypothesized increase in special interest tours exist. They fill the need for a unique product.

Other than the deviation of the smaller sample size in The Globe and Mail (1975), the two newspapers correspond quite closely. The two seasons sampled each year similarly correspond closely. But they too have an exception to the rule. There is consistently a greater number of summer than winter travel advertisements over the years and between the newspapers. The exception occurs in the last year of both papers where the winter season surpasses the summer in advertising totals by a small margin. Support, but no explanation, for this trend is provided in "Outbound Canadian Travel" (Tourism Canada, 1984). The article describes a slow but steady levelling off of the difference between peak and non-peak periods of tourist re-entry into Canada. Here again, the tour operators are demonstrating their understanding of the need to offer a unique product. Offering package tours in all seasons rather than in only one or two, provides more opportunity for packages involving seasonal activities.

5.2.2 Number and Variety of Destinations in Newspaper Travel Advertising

A similar pattern developed with regard to the numbers of different destinations listed in each of the two seasons. Here again, the summer season regularly exceeds the winter, this time in total numbers of destinations. In comparison to the total advertising figures, however, the reverse is true only of The Toronto Star's 1985 sample rather than that same sample in both newspapers (Table 5.2 and Figure 5.2).

It is likely more than coincidence that the total number of advertisements and the total number of destinations demonstrate similar trends. It is actually plausible and probable that the more destinations available, the more advertisements possible and necessary. Therefore, there must, in fact, have been a slight increase in packaged winter destinations and activities since 1975 to explain the above findings.

The destinations listed in the analyzed advertising also indicate an overall increase. The destinations described in 1955 include an assortment of North American spots, a few Caribbean Islands, and a general "Europe" category. The situation in 1965 is similar to that of 1955 with the addition of a few new destinations which increase the total. The 1975 data demonstrates a discrepancy between newspapers. As a result of the small sample size, The Globe and Mail again does not follow the developing trend. Rather, that newspaper's sample decreases slightly in total number of destinations advertised. The Toronto Star, however, does add a few new destinations and

Table 5.2: Total Number of Different Destinations in the Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985.

<u>The Globe and Mail</u>					<u>The Toronto Star</u>				
<u>Year</u>					<u>Year</u>				
<u>Season</u>	1955	1965	1975	1985	<u>Season</u>	1955	1965	1975	1985
Summer	29	34	29	68	Summer	24	28	56	93
Winter	15	32	14	51	Winter	12	27	48	106

Source: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and December 10, 1955; April 24 and November 13, 1965; May 10 and November 29, 1975; May 4 and November 9, 1985.

Figure 5.2: Total Number of Different Destinations Mentioned in the Travel Advertisements Analysed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1965; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985

continues to increase the totals. In 1985, the number of destinations doubled from the previous year's totals in both newspapers. The world has apparently 'opened up', with tourists travelling to almost anywhere and everywhere. The consistent expansion of the number of tourist destinations suggests a continual addition of sites as opposed to a process of dropping-off one and replacing it with another. It also corresponds to the claims in the literature declaring the need for more and for new destinations to serve a significantly larger and more experienced travel market. This is a market which, of late, seems to be demanding more variety and which, in turn, is hypothesized to be supplied in the form of special interest package tours.

5.2.3 Trends Found in the 'Descriptors' Used in the Newspaper Travel Advertising

Of the four 'descriptor' categories outlined in Chapter 4 (Table 4.7), "Budget" demonstrates the strongest trend; an upward trend. It is a trend illustrating an elevated emphasis on economic value (Table 5.3 and Figure 5.3). In this category, as in the others, the two newspapers and the two seasons, for the most part, parallel each other. The differences are generally minimal and do not alter the overall trend. There are, however, a few unusual larger discrepancies that can only be explained, with the information available, by interpreting the sample as unrepresentative of the situation. This category, unlike the others, does demonstrate a small but distinct edge of

that as the "Once-over-lightly" tours increase, the "Fixed site" tours of the same newspaper and year decreases or vice versa.

A pattern in the "Fixed Site" tour type is even less perceptible than in the "Once-over-lightly" tour type. For the most part, what seems to have developed is a slight rise in the mid-years, 1965 and 1975, and then a slight decline in 1985. Part of the problem of the perceived inconsistencies also lies in the difficulty in categorizing tours into specific types when often they contain elements of more than one "type". This category overlap is particularly true of the first two categories.

The "Special interest" tours are more easily identifiable because it is the 'special interest' that is being promoted. The "Special interest" tours can actually be divided into either a "Once-over-lightly" or a "Fixed site" tour type. The difference is the activity or theme of that tour. For instance, a classical music cruise can be categorized with the other cruises under "Fixed site", but because of its specific theme, it is classified as a "Special interest" tour. The pattern that has developed in this tour type is a small but clear increase (Table 5.9 and Figure 5.9).

As with the 'descriptors', when viewed more generally, the wider trends are more obvious. In 1955, "Once-over-lightly" tours had a slight advantage over "Fixed site" tours but together they comprised all but ten percent of the total tour types. The remaining percent were accounted for, not by the third tour type, "Special interest", but by the "General"

Table 5.3: Total Number and Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of "Budget".

<u>The Globe and Mail</u>					<u>The Toronto Star</u>				
Year	1955	1965	1975	1985	Year	1955	1965	1975	1985
Frequency					Frequency				
Season	N. %	N. %	N. %	N. %	Season	N. %	N. %	N. %	N. %
Summer	2 14	8 42	7 47	15 60	Summer	1 17	5 56	21 53	43 77
Winter	2 40	2 50	5 63	18 78	Winter	0 0	5 63	19 76	49 88

Source: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and December 19, 1955; April 24 and November 13, 1965; May 10 and November 29, 1975; May 4 and November 9, 1985.

Figure 5.3: Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of "Budget"

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1965; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985.

The Toronto Star over The Globe and Mail in the consistently higher number of "Budget" descriptors in its advertisements. This edge might be explained by the differing readerships of the two newspapers. The business orientation of The Globe and Mail may imply a more affluent thus slightly less cost conscious readership.

In the "Pleasure" category, although less consistent and sharp than the "Budget" category, a trend toward a slow decline is apparent (Table 5.4 and Figure 5.4).

A trend less uni-directional is observable in the category designated "Exciting". The applicable adjectives appear to increase gradually peaking in 1975 and then decreasing somewhat in 1985 (Table 5.5 and Figure 5.5).

The last of the four 'descriptor' categories demonstrates a decline of emphasis. Unlike the decline apparent in the "Pleasure" category which was slow and steady, the "Planned" category's decline has a sharp drop from 1955 to 1965 and from there continues a less distinct downward trend (Table 5.6 and Figure 5.6).

It is easier to see the shift in emphasis that has evolved over the study period when looking at the four 'descriptor' categories more collectively and more generally. In 1955, the "Planned" and "Pleasure" categories account for 50% and 30% respectively of the total descriptors. The other two categories constituting the remaining 20%. Conversely, by 1985, the "Budget" category accounts for a phenomenal 70% of the total and "Exciting" another 25%. Thus, the "Planned" and "Pleasure"

Table 5.4: Total Number and Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of "Pleasure".

<u>The Globe and Mail</u>								<u>The Toronto Star</u>									
Year	1955		1965		1975		1985		Year	1955		1965		1975		1985	
Frequency									Frequency								
Season	N.	%	N.	%	N.	%	N.	%	Season	N.	%	N.	%	N.	%	N.	%
Summer	4	29	6	32	0	0	2	8	Summer	2	34	1	11	6	15	3	5
Winter	0	0	1	25	2	25	2	9	Winter	2	40	2	25	0	0	1	2

Source: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and December 19, 1955; April 24 and November 13, 1965; May 10 and November 29, 1975; May 4 and November 9, 1985.

Figure 5.4: Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of "Pleasure"

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1965; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985.

Table 5.5: Total Number and Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of "Exciting".

<u>The Globe and Mail</u>										<u>The Toronto Star</u>									
Year		1955		1965		1975		1985		Year		1955		1965		1975		1985	
Frequency										Frequency									
Season		N. %		N. %		N. %		N. %		Season		N. %		N. %		N. %		N. %	
Summer		0	0	3	16	6	40	7	28	Summer		0	0	1	11	11	28	10	18
Winter		0	0	1	25	0	0	2	9	Winter		0	0	0	0	3	12	4	7

Source: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and December 19, 1955; April 24 and November 13, 1965; May 10 and November 29, 1975; May 4 and November 9, 1985.

Figure 5.5: Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star Travel for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of "Exciting"

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1965; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985.

Table 5.6: Total Number and Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985. Emphasizing the Concept of "Planned".

<u>The Globe and Mail</u>								<u>The Toronto Star</u>							
Year	1955		1965		1975		1985	Year	1955		1965		1975		1985
Frequency								Frequency							
Season	N.	%	N.	%	N.	%	N.	Season	N.	%	N.	%	N.	%	N.
Summer	8	58	2	11	2	13	1 4	Summer	3	50	2	22	2	5	0 0
Winter	3	60	0	0	1	13	1 4	Winter	3	60	1	13	3	12	2 4

Source: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and December 19, 1955; April 24 and November 13, 1965; May 10 and November 29, 1975; May 4 and November 9, 1985.

Figure 5.6: Percentage of Advertisements Analysed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Emphasizing the Concept of "Planned"

summer season (s)

winter season (w)

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1965; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985.

categories, previously responsible for 80% of all descriptors, are now left to make-up less than 10% of the total.

The substitution of key adjectives does not mean that the packages are now less 'planned' or 'pleasurable', but only that these elements are no longer emphasized or evident in the advertising. It seems that these elements, particularly 'planned', have come to be synonymous with package tour travel and, thus, not in need of promotion. It also seems that new tourist demands have necessitated new advertising, not necessarily a new supply of package tours, but necessarily a new wrapping for that same package which presents people with what they want to see. According to the 'descriptors' emphasized in 1985, what the tourists are looking for are economy and excitement.

This finding fits quite accurately with the literature previously reviewed. As with the increased number of destinations, the emphasis on 'excitement' demonstrates the need for something more than that which the tourists have already done and seen. They are now more experienced and are continually searching for new destinations or new variations to old destinations. The 'excitement' descriptor and the need for variety that it implies, provides still more indirect support for the hypothesized increase in special interest tours. With reference to the 'Budget' element, the literature indicates that, even in an economically difficult period, vacations would be maintained but a search and demand for value would prevail. The data from the content analysis substantially supports this

claim. It is an educated guess that the severity and complexity of developments in the economy and the work world interfered with what would otherwise have been a continued upward trend of "Exciting" and necessitated an exaggerated interest in "Budget". This exaggerated interest might be particularly true of younger rather than older, more established generations.

5.2.4 Trends Found in the 'Tour Types' Offered in The Newspaper Travel Advertising

The patterns developing in the total 'tour types' over the 30 year period studied, are less consistent than those of the descriptors both with regard to yearly variations and between newspapers. The seasons are still similar, however, and more importantly, there are still general trends perceptible.

The number of "Once-over-lightly" tour types advertised declines over time (Table 4.7). There are, however, some major fluctuations in the bar graph (Table 5.7 and Figure 5.7). The raw data indicated that the "Once-over-lightly" tours are almost always presented and popular with new, culturally distinct destinations (i.e., "The Orient" or "South America"). Although there is an increase in the total number of destinations, the culturally distinct destinations are randomly intermixed with the sun, sea and sand destinations and not necessarily following the same uni-directional pattern. It is this intermixing of destination types that may account for the larger fluctuations in both the "Once-over-lightly" and "Fixed Site" graphs (Table 5.8 and Figure 5.8). What is generally apparent, however, is

Table 5.7: Total Number and Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Describing "Once-over-lightly" Tour Types.

<u>The Globe and Mail</u>					<u>The Toronto Star</u>				
Year	1955	1965	1975	1985	Year	1955	1965	1975	1985
Frequency					Frequency				
Season	N. %	N. %	N. %	N. %	Season	N. %	N. %	N. %	N. %
Summer	8 53	7 35	7 53	12 27	Summer	5 56	5 45	4 9	20 42
Winter	9 75	5 34	2 29	14 23	Winter	7 64	4 50	5 14	21 27

Source: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and December 19, 1955; April 24 and November 13, 1965; May 10 and November 29, 1975; May 4 and November 9, 1985.

Figure 5.7: Percentage of Advertisements Analysed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Describing 'Once-over-lightly' Tour Types

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1965; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985.

Table 5.8: Total Number and Percentage of Travel Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Describing 'Fixed Site' Tour Types.

<u>The Globe and Mail</u>					<u>The Toronto Star</u>				
Year	1955	1965	1975	1985	Year	1955	1965	1975	1985
Frequency					Frequency				
Season	N. %	N. %	N. %	N. %	Season	N. %	N. %	N. %	N. %
Summer	6 40	9 45	5 38	13 30	Summer	3 34	5 45	37 82	25 38
Winter	2 17	5 34	5 71	25 41	Winter	2 18	4 50	26 70	32 41

Source: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and December 19, 1955; April 24 and November 13, 1965; May 10 and November 29, 1975; May 4 and November 9, 1985.

Figure 5.8: Percentage of Advertisements Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Describing 'Fixed Site' Tour Types

summer season (s) winter season (w)

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1965; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985.

that as the "Once-over-lightly" tours increase, the "Fixed site" tours of the same newspaper and year decreases or vice versa.

A pattern in the "Fixed Site" tour type is even less perceptible than in the "Once-over-lightly" tour type. For the most part, what seems to have developed is a slight rise in the mid-years, 1965 and 1975, and then a slight decline in 1985. Part of the problem of the perceived inconsistencies also lies in the difficulty in categorizing tours into specific types when often they contain elements of more than one "type". This category overlap is particularly true of the first two categories.

The "Special interest" tours are more easily identifiable because it is the 'special interest' that is being promoted. The "Special interest" tours can actually be divided into either a "Once-over-lightly" or a "Fixed site" tour type. The difference is the activity or theme of that tour. For instance, a classical music cruise can be categorized with the other cruises under "Fixed site", but because of its specific theme, it is classified as a "Special interest" tour. The pattern that has developed in this tour type is a small but clear increase (Table 5.9 and Figure 5.9).

As with the 'descriptors', when viewed more generally, the wider trends are more obvious. In 1955, "Once-over-lightly" tours had a slight advantage over "Fixed site" tours but together they comprised all but ten percent of the total tour types. The remaining percent were accounted for, not by the third tour type, "Special interest", but by the "General"

Table 5.9: Total Number and Percentage of Advertising Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Describing 'Special Interest' Tour Types

<u>The Globe and Mail</u>									<u>The Toronto Star</u>										
Year		1955		1965		1975		1985		Year		1955		1965		1975		1985	
Frequency										Frequency									
Season		N. %		N. %		N. %		N. %		Season		N. %		N. %		N. %		N. %	
Summer		0	0	3	15	1	8	17	39	Summer		0	0	0	0	1	2	4	6
Winter		0	0	2	13	0	0	18	30	Winter		0	0	0	0	2	5	15	19

Source: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and December 19, 1955; April 24 and November 13, 1965; May 10 and November 29, 1975; May 4 and November 9, 1985.

Figure 5.9: Percentage of Advertising Analyzed in The Globe and Mail and The Toronto Star for the Years 1955, 1965, 1975 and 1985 Describing 'Special Interest' Tour Types

Sources: The Globe and Mail and The Toronto Star Saturday Travel Sections for May 14 and Dec. 10, 1955; April 24 and Nov. 13, 1965; May 10 and Nov. 29, 1975; May 4 and Nov. 9, 1985.

category (Table 4.7). By 1985, The Toronto Star is moving toward, and The Globe and Mail has achieved, a three-way split between the 'tour types' advertised.

The relevant discovery here is that there is indeed evidence of a growing attention toward special interest tours as was hypothesized. The data here, however, proves only that there is an increase in the advertising of these tours. To further substantiate the actual existence and increased popularity of special interest tours, an analysis of the data accumulated from the survey research is required.

5.3 Analysis of the Results of the Tour Operators Survey

The responses to the questions in the interviews and the questionnaires were comments unique to each tour operator's specific circumstances and experiences. It was found, however, that a great many of these responses were, in fact, similar. For this reason, and because of the qualitative nature of both survey methods used, the ensuing analysis identifies three very broad, general themes recurring throughout the responses, details related comments and supports the findings with the few quantifiable results. The system of analysis used seems to be the most appropriate and organized way of dealing with the very many and complex interrelationships of concepts and observations involved. The three themes, then, are growth, value and flexibility.

It is intended that within the discussion of these three themes, evidence in support of the hypothesized trend toward an

increased number of special interest package tours will be found. It is also expected that any other trends occurring will surface along with the external determinants of those trends. More specifically, it is expected that the 'growth' theme will correspond to the evidence of growth found in the content analysis; that the 'value' theme will support the discussion regarding the 'Budget' descriptor, and that the 'flexibility' theme will describe the need for and existence of more special interest package tours.

5.3.1 Growth in the Numbers of Tourists and the Amount of Tourism

Throughout the survey data, there exists a very evident emphasis on growth. The tour operators talk about a growth in the industry generally. They talk about "more leisure time"* in terms of, and as a result of "increased vacation periods" and "earlier retirement" and recognize this increased leisure as conducive to increased travel. They talk about a growth in interest and importance of travel to the extent that they describe it as a "necessity" and "routine" part of life for the whole family. They talk about "more people travelling"; about the "wider market"; and about the range of ages of tourists as "too wide to assess". They describe the ages as "students to

*Note: The following quotations are taken from specific mail-back questionnaires. The comments, however, are not unique to any one questionnaire. Similar comments are common throughout the survey data. For this reason and due to confidentiality, the quotations are not referenced. Comments unique to a particular verbal interview, on the other hand, can and will be referenced.

seniors" or as "all ages". More specifically the ages range from six to ninety with an average age of approximately forty-four. The tour operators also make particular reference to a growing number of both women and senior citizens travelling. They explain the growth in the number of women as a result of their increased numbers as independent income earners. "Females can more and more afford a holiday". They explain the growth in the number of seniors as a result of more time due to earlier retirement, of more experience with travel and, consequently, of being more prepared to participate than the seniors before them.

The growth in experience is not limited to the seniors, however. The tour operators talk emphatically about the significant amount of travel experience recognized in tourists generally. They describe tourists today as "more sophisticated". They are more discerning; "they know what they want". They are "more and more aware and knowledgeable". They are more adventurous and receptive to new and different experiences. "More people are willing to take exotic vacations" and travel experience makes more people "more receptive to different packages". And questionnaire data show thirty to forty-two respondents (71%) agreeing that tourists are more demanding and particular. Responses as to exactly what tourists are looking for can be condensed into three repeated requests:

1) a unique experience: tourists are looking for something "off the beaten track"; for "more activities and adventure"; for "education and experience"; for "variety" and "different

destinations". Essentially they are looking for "unique features".

2) Quality: tourists are looking for "personal service", "more service", "better service", "good accommodation and transportation", "good meals" and "quality of sightseeing". Essentially, they are demanding "quality";

3) Economic value: the primary response involved comments such as a demand for "all inclusive arrangements", "economical price", "no hidden cost", "honest value", "freebies", "bargains" and "lower price". Essentially, the tourists are looking for "value for money".

Lastly the tour operators talk about a growth in the number of tourist destinations. Questionnaire results show twenty-four of thirty-six respondents (67%) having made more destination alterations in the past fifteen years. In attempts to continue to satisfy the growing curiosity of a growing number of tourists, tour operators describe the need for more destination options. They are turning to destinations increasingly further afield and increasingly 'exotic'. South America and China are two such recent examples. But, as destinations are a limited and rapidly depleting resource, such efforts as recycling old popular spots with new creativity are becoming more evident and necessary. Some tour operators believe that there are destinations which are able to maintain a relative degree of popularity over time. One such example is Europe where "there is variety, history and strong cultural ties" (American Express Canada Inc.). It has large metropolitan centers and all of the

activities that go along with them. It has a number of different nations and cultures in a relatively small area. It has unique historical significance and cultural heritage. And it has the 'sun, sea and sand' spots as well. It appeals to a variety of tastes and interests and is, therefore, highly marketable.

Destination decisions are not made purely on what a particular destination has to offer, however. The tour operators point out that accessibility is often dependent on political circumstances. They give China as an example of a new government slowly opening its doors to tourists (Canadian Friendship Tours, Travac Tours), and political acts such as terrorism as obstructing already existing tourist flows (Voyageur Travel Services; Butterfield & Robinson; CP Air Holidays/Treasure Tours; Thomson Vacations). Terrorism is ranked third (Table 5.10) by the questionnaire respondents in a list of six factors (recession, dollar value, unemployment, energy crisis, deregulation) affecting, or potentially affecting, the tourism industry. It was not asked, however, -- whether the effect was positive or negative. From the comments offered, however, it was, as might be expected, negative for those operators with package tours destined for the affected areas and positive for inbound tour operators. All agree, however, that the effects are short-lived; people unaffected quickly forget.

5.3.2 The Tourist Demand for Value

If destination accessibility is dependent on political circumstances, destination popularity is dependent on economic conditions. The tour operators list dollar value as an extremely important determinant of where tourists travel. The more buying power the Canadian dollar has at a particular, foreign destination, the more likely it is that tourists will frequent that spot and the more popular it will be. Dollar value is ranked number one in the list of six factors (Table 5.10). It is regarded by the tour operators surveyed as having the most effect on the tourism industry. In addition to affecting where tourists go outside of the country, it also affects the number of tourists coming into the country. With a weak Canadian dollar, the tour operators are experiencing a larger than usual influx of foreign tourists, particularly American, trying to make their travel dollar stretch a little further.

The recent recession and unemployment situation are named by the tour operators as the two other economically related factors affecting the tourism industry. They are ranked second and fourth respectively in the list of six (Table 5.10). They are both seen as influencing the length and numbers of vacations taken. For the most part, the tour operators agree that the length of individual travel periods are decreasing. They are shorter. A number of three or four day weekend type tours are now being produced and becoming increasingly popular (Thomson Vacations; Goliger's). There are comments to the effect that

Table 5.10: Ranking of Factors Described as Effecting the Individual Tour Operators' Package Tour Demand

Rank Factor	1	2	3	4	5	6	Other	N/A	Total Res- ponses	Average Rank	Rank Overall
Recession	9	9	7	4	2	0	0	8	39	2.4	2
Dollar value	23	6	3	1	1	1	0	6	41	1.4	1
Unemploy- ment	0	6	5	5	4	3	0	14	37	3.7	4
Energy crisis	1	3	2	2	9	2	1	16	36	4.25	6
Terrorism	10	10	4	4	1	2	1	6	38	2.6	3
Deregula- tion	1	3	5	3	3	5	1	14	35	4.1	5

Note: #1 = most effect

'Other' = ranking given above the number of factors (6) in the list. The exact ranking given is in parentheses beside the number of the responses.

N/A = no effect (not included in the scoring of the 'average rank').

Source: Questionnaire data.

the recession has caused a reduction in the frequency of travel (CP Air Holidays/Treasure Tours). On the other hand, there are comments suggesting that unemployment is allowing tourists more time to travel (Canadian Friendship Tours). The apparently contradictory comments relate back to the discussion in Chapter 3 which describes the situation in the recent past and the present as one where most people are employed and they, therefore, have the money but no time for travel. It also describes the situation which is evolving where fewer people have full-time, permanent employment and, therefore, have the time but less disposable income. In agreement with the idea of more longer stays, are the comments concerning early retirement (as previously discussed) and the effect of deregulation on the industry. Deregulation, ranked fifth of six, decreases the number of restrictions regarding length of stay, therefore, there are "more long stays".

If the tour operators do not agree on exactly how the recession and unemployment are affecting the industry with regard to length and frequency of travel, they do agree that there is a reduction in Advance Booking Charters (ABC's) or long-term travel planning. They see, as the potential tourists see, the instability and uncertainty of the present and future economies as an occasion to exercise caution. Last minute bookings are, consequently, becoming more common. Terrorism is also a factor in this new trend. People travel where and when it is safe to do so, economically and/or politically. If they are unsure, they generally do not indulge.

The tour operators, even more decidedly, agree on a second, related outcome of the present poor economic conditions: the demand for value. The reasons causing the decline in ABC's, namely an unstable and uncertain economic and employment future, are the same reasons causing a rise in budget conscious tourists. A virtually unanimous observation by the tour operators of both personal and mail-back surveys see tourists seeking and searching out the most economical package tours available. Evidence of this trend has already been encountered in the package tour advertising analyzed in the previous section, as well as earlier in this section with reference to what today's more experienced tourists are demanding. As a consequence, tour operators see an increased interest in all-inclusive package tours; package tours with no hidden costs; package tours to club-type resorts and cruises that cater to this request. The increased interest in all-inclusive package tours is one of two main responses to a question in the questionnaire asking the tour operators if and how package tours will change in the future. Twenty-four of thirty-seven respondents (65%) believed that package tours would, in fact, change and that more all-inclusive package tours as well as more variety, activity and flexibility within package tours would be the two definitive directions of change.

5.3.3 The Need for Flexibility of the Tour Operators and the Package Tour Product

In order to maintain their clientele, to produce profits and, ultimately, to survive, the tour operators surveyed recognize the need to entertain the tourists' requests. They recognize the need to be flexible with regard to the variety of activities newly sought. They recognize also that there are, within the general demand for variety, some particular and presently popular requests. One request is for physical activity options within the tour packages, a request considered consistent with the fitness 'fascination' of the past few years (Butterfield & Robinson; Goliger's; Travac Tours). Another request is for special interest or 'theme' tours. In response, some tour operators are adding and incorporating these elements, or versions of them, into their package tours. The questionnaire data support this claim to a limited extent. When asked if the respondents saw non-specialized, as opposed to specialized, tour operators changing their package tours in any way in the past, twenty-one of thirty-eight respondents (55%) answered that they had, as well as specifically stating that they were ensuring more variety in their packaged product.

Also in response to the new demands of the tourists, the number of tour operators catering to special interests are growing. Questionnaire statistics supporting this claim are considerably more conclusive than the last claim. The respondents, when asked if they had noticed an increase in the number of special interest tour operators in existence in the

recent past, answered quite significantly in the affirmative (Table 5.11).

Table 5.11: Changes in the Number of Special Interest Tour Operators in Existence

<u>Special Interest Tour Operators</u>	<u>Number</u>	<u>Percentage</u>
Increase	34	79
Decrease	3	7
No Change	6	14
Total	43	100

Source: Questionnaire Data.

Special interest tours, by their very nature, cater to small groups only. As a result, they cannot produce the same profit margin in the same manner as the larger, mass produced ITC's. The tour operators must, somehow, compensate for this circumstance in order to continue to be able to offer such products and not go bankrupt in the process. The tour operators surveyed described two methods of compensation. The first is to raise the price of the product to ensure some level of profit. Such a step, however, automatically alters the clientele. Special interest tours, therefore, tend to cater to a more upscale market. The second method of compensation necessitates the special interest tour operators finding and securing their own particular niche or unique interests to cater to, thus alleviating any undue competition.

The competition between tour operators and their products is typically stiff. The tour operators surveyed commented on this

competition as well as the fact that all tour operators, not just special interest tour operators, need to find a niche in the market. A sole comment was included in the questionnaire to the effect that each company was doing something a little differently in order to provide that 'something extra' demanded by the tourists. After individually analyzing all of the questionnaires, it was quite clear that each company is unique in some way. There is not one tour operator that absolutely or completely overlapped in content, clientele, transportation or destination with another. The difference can be as small as the age group of the clientele or as large as the type of experience encountered on the trip (i.e., suntanning on a beach or taking a French immersion program in Paris).

Thus, the information provided from the survey does indicate that tour operators are slightly and slowly altering their product in consideration of the new demands of the tourists. It shows tour operators and their products as flexible and adaptable to current conditions. The surveys have shown that there is a growth in the number and kinds of tourists, their experience and tourism generally. They show that, as a result of these growths, there are new demands on the tourism industry. The surveys have shown that political and economic conditions affect the frequency and direction of tourist flows. They have shown that the recession and unemployment have helped increase the number of budget conscious tourists but have had little effect on the actual amount of tourism. And, most importantly, the surveys indicate that the tour operators are

attempting to produce package tours in keeping with the contemporary situations.

According to the tour operators, there are two major demands which seem to have emerged from present conditions. They are economy and variety, two factors far from dissimilar to the dominant 'descriptors' ('Budget' and 'Exciting') found in the recent travel advertising. The tour operators seem to have responded to the 'economy' demand by including less luxurious accommodations or by eliminating some of the excess extras. The 'variety' demand continues to be met by changing destinations and adding activities. But of particular relevance to this research is the emerging existence, very apparent in Table 5.11, of special interest tour operators catering to particular, specific and unique interests.

5.4 Summary and Conclusions of the Analyzed Data and Results

The intent of this chapter, and the thesis generally, was to determine if, in fact, there is a growing number of special interest tours being produced. Both the content analysis of newspapers and the survey of tour operators quite clearly indicate that there are more such tours and tour operators in existence. It was also the intent of the research to identify any other trends that may have become evident through the analysis of the data. Both research methods distinguished an emphasis on economy and the growth of tourism as two other significant trends. It was, finally, the intent of this research and the purpose of this section, to examine these

trends in the context of the current external environmental conditions in an attempt to find explanatory variables.

The emphasis on economy evident in the data provided by the tour operators is backed by the results of the content analysis. The 'Budget' theme as of 1985 was, by far, the predominant 'descriptor' in the advertising. The tour operators attribute this predominating theme to recent economic conditions. They describe 'dollar value' as a major determinant of tourist destination flows. Tourists travel to where they will get the best value for their dollar. They describe the recession and unemployment as affecting the length and frequency of vacations taken in a polarized manner. Specifically, the tour operators see an increased demand for shorter (three to five day weekend) vacations by a growing number of people who have high disposable incomes and little time. In contrast, they also see increased demand for longer (one to three month) vacations by a growing number of retired people and by the unemployed; those with potentially less disposable income and more time. But, in general, there is an increased demand for value. The difficult economic period of the last few years has affected everyone differently, but it has affected everyone. People are, consequently, more value conscious with regards to their travel plans. They are searching for the package deal that can provide them with the most/best value for their money. And the tour operators are responding appropriately where possible. They are offering 'bare bones' packages, more all inclusive packages, and emphasizing the value of those and other

packages in their advertising.

The observations of the tour operators as to the impact of the economy on tourism agree with the description of the situation outlined in the literature reviewed. The authors cited describe the economy as an important influence on touristic movement. They describe tourism as relatively resilient to minor fluctuations but recognize, too, that the severity of the recent recession will necessarily affect the industry. The research confirms this description by revealing that there is growing tourism activity and more emphasis on economic value.

Far from observing a decline in tourism, the tour operators surveyed describe an overall growth in the industry. More specifically, they describe a growth in the numbers of tourists, the types of tourists (i.e., wider age range and more female participants), and the level of travel experience of tourists. As causes of this growth, the tour operators see earlier retirement as encouraging more seniors to travel; an increase in the number of economically independent females as encouraging more females to travel; and a general increase in leisure time as encouraging the increase in the numbers and experience of tourists. This growth trend and its causes correspond to the information presented in Chapters 2 and 3. Specifically, it relates to the relatively new emphasis on leisure time and the possibility of tourism becoming one of Canada's largest industries.

The tour operators' responses to this growth indicate that

they realize the need to provide more packages, to more destinations and appeal to more and different market segments. These responses are supported by the data described by the content analysis of newspaper travel advertising. The content analysis found more and larger advertisements to more and different destinations and more and distinct groups of tourists. The result is product variety.

An even more specific response to the growth in tourism, the numbers of tourists and the tourists' level of experience is the increased number of special interest tour packages being made available and being advertised. Chapter 2 describes new generations emerging in society that have grown up in the jet age. Travel and tourism are more and more commonly engaged in by a large majority of the population. The consequence has been a heightened level of travel experience for many more people. The authors cited in Chapter 2 suggest a growing need for diversity, variety and flexibility of the package tour product in order to continue to attract the well-travelled individuals. This need and its relevant response are exactly what the tour operators surveyed have recognized. And it is in their efforts to accommodate these new requests that special interest tours are increasing in numbers. Special interest package tours provide tourists with a new type of experience, new activities in which to engage and a new perspective to an increasingly common form of entertainment and leisure.

In essence, the research data has supported the literature reviewed and the tour operators have responded to the new needs

and demands of the tourists in an appropriate manner. What the tour operators surveyed did not include in the data obtained was some evidence of recognition of the less obvious and less direct causes for these new trends. They did not make reference to the deeper, underlying causes of the recent developments in tourism. They acknowledge the conditions of the economy (the recession and unemployment) as affecting tourism. They, in effect, acknowledge the polarity between the employed and the unemployed and their differing demands with regard to the length and frequency of their vacations. But they do not delve beyond these conditions in search of more profound causes. They recognize a growth in tourism and attribute it to an increase in amount and importance of leisure. But, again, they do not describe exactly why this growth and increase is occurring. The tour operators surveyed do not acknowledge the substantial influence modern technology and shifting social values have had on society generally and consequently on tourism.

The literature in Chapter 3 describes modern technology as infiltrating the work place and reorganizing the system of production. It describes a society emerging where 'work' and 'employment' are no longer synonymous. It describes a society with a new concept of 'home work' emerging. It describes a decrease in the use of human labour resources and a consequent continued increase in the number of unemployed. Chapter 3 also describes a society emerging with a new emphasis on leisure time; a society shifting away from the previous prevalent Protestant work ethic to a society where work and leisure time

together determine the quality of life.

The tour operators do not attribute the current work and leisure conditions to the more crucial changes occurring with modern technology and social values as was suggested in the literature cited. In fact, a section of the questionnaire was specifically designed to allow the tour operators to provide the researcher with comments as to how these elements have influenced tourism (Appendix 2). The comments expected, however, were not the comments received. It was expected that the comments would describe modern technology and social values as fundamental determinants of society and ultimately of tourism. It was expected that they be recognized as determinants, at least partially, of unemployment and the increase in the amount and importance of leisure time and, therefore, of tourism.

The comments collected with respect to modern technology were made up primarily of three themes: "more efficiency but impersonal"; "shorter travel time"; and "instant communication". All three of which are valid and vital comments in agreement with related discussions presented in Chapter 3, but which do not directly deal with the issue of how the technology may have altered societal conditions thus altering aspects of tourism. The comments deal only with the direct link of technology to tourism. More to the point, the tour operators were asked to comment on the 'work ethic'. Their responses, for the most part, referred to the level of service provided to the client (i.e., "low work ethic affects level of service to

clients"; "less commitment to tourist") or the competition between companies (i.e., "undercutting name of the game"; "industry cut throat"). These comments were not anticipated by the researcher and did not offer any insight as to how the changing nature and importance of work (wage or otherwise) have affected tourism. They do, however, give an indication of the state of the business generally. Similarly, when asked to comment on 'values' the replies dealt with economic value rather than the expected social values. The tour operators talk about the saving and spending habits of the tourists and include comments such as "everybody looking for a deal" or "consumer demanding better value" or "people more value conscious and picky".

The unexpected points of view from which the responses were made may be, in part, due to the format of the question itself. Only the specific terms (i.e., 'modern technology', 'work ethic', and 'values') were set forth for the tour operators to comment on the influence of these elements on the industry. No further clarification of purpose was presented so as to avoid influencing the direction of the responses. In light of the results, however, it seems that the question and the key words may have been too vague.

The resulting responses, however, may also suggest that this is the frame of reference from which the tour operators conduct their day to day business. It may suggest that they do not look beyond the direct cause and effect links to the more significant developments occurring in society. And it may suggest that it

is not necessary for the tour operators to recognize the broader underlying trends but to simply meet the present demands of their customers. When asked how package tours will change in the future (Appendix 2), the tour operators essentially described the need to alter their packages according to the demands now being put forth (i.e., "wider variety"; "more all inclusive programs"; "shorter duration"). These responses seem to suggest that the tour operators are operating on a year to year basis without any substantial longer term planning. The tour operators recognize and describe the contemporary trends of a general growth in the industry, an emphasis on value and an increase in the numbers of special interest package tours. But, their lack of more thorough research on societal trends may, in the long run, affect their ability to keep up to, and cater to, the changing needs of their most essential element - the tourist. It may reduce their ability to effectively compete with the more thoroughly researched companies. It may, as a result, sustain the characteristic instability of the industry.

CHAPTER 6

CONCLUSION

6.1 Introduction

The introductory comments and the literature reviewed in earlier chapters of this thesis described the current circumstances of a growing tourism industry, of package tour popularity and of changing conditions of the broader society. These chapters also established the interrelationship of these three concepts. They established that tourism, and subsequently package tours, is influenced by societal changes. They established that modern technology and modern values have produced new procedures for work and new perspectives on leisure. What they did not establish was exactly how the societal changes influenced tourism generally and package tours specifically. Therein lies the reason for the research that followed. The research described in Chapter 4 and analyzed in Chapter 5 was intended to determine how external environmental conditions influenced tourism and, more particularly, how these conditions may have influenced the supply and demand of the special interest package tours. The information gathered and the results obtained do, in fact, describe broader societal trends determining the direction of recent package tour trends. The information and results will hopefully provide evidence for tour operators of the importance of considering broader conditions in society when researching and designing package tours. Acknowledgement of this relationship and appropriate

alterations to their products should make them better able to compete in an already highly competitive business.

6.2 Summary of the Thesis Research

It was hypothesized in Chapter 1 that there is an increase in the number of special interest package tours available. It was also specified that this hypothesized trend would be examined in the context of contemporary societal conditions in an attempt to find explanatory variables. The hypothesis and the context of study were derived from the reviews of the state of tourism, package tours and society generally. They were derived from the realization that tourism is an increasingly common leisure engagement continually enhancing the level of experience of its participants. They were derived from the realization that the package tour product, as part of the growing tourism industry, has had to grow along with this enhanced experience. It has had to diversify its content in order to continue to satisfy the new demands of these increasingly sophisticated tourists. The hypothesis and the context of study were also derived from the recognition of the role of the various external elements in tourism and package tour development. Political events including terrorism and governmental concession and cooperation were described as important influences on the flows of tourists. Economic conditions were recognized as a determinant, not in the decision of whether or not to partake in tourism, but in the decisions as to the length and frequency of the activity. Increased leisure

time was also perceived as a condition supporting tourism growth. But, as it was recognized that these external elements affected tourism, so, too, was it recognized that modern technology and changing social values are the more profound causes of these specific situations in society and, consequently, of recent tourism activity. Modern technology is advancing in efficiency to the point of replacing human labour and, thus, contributing to the rates of unemployment. It is changing the nature of 'work'. It is producing a shift away from permanent, long-term employment to more short-term, contractual employment. It is producing more innovative and independent industry from the home environment to make up for and/or supplement office, wage work. Changing social values are responsible for the gradual displacement of the Protestant work ethic with an emerging leisure ethic. The importance of leisure time and leisure activities is increasing and, therefore, lessening the importance of employment. Together modern technology and modern values play a major part in determining societal directions. They determine tourism activity either directly through developments in transportation and communication equipment allowing for faster service and through an increased importance of tourism for the individual. Or they can determine tourism activity indirectly by affecting work and leisure patterns which, in turn, determine the amount of time spent in either and the amount of disposable income available for tourism.

It was found that each of the two research methods employed

to verify if the hypothesis was valid, complemented the findings of the other. The content analysis of newspaper travel advertising provided information on the conditions and situation of package tours described by the tour operators in the survey. It also provided a broader overview of how package tours have changed over the thirty year study period. The survey of Ontario tour operators proved to be more informative in identifying causes for the status of package tours. It offered reasons why the tour operators saw, and the newspapers confirmed, a particular trend occurring. Both of the research methods were, however, more qualitative than quantitative making it difficult to categorize and, therefore, analyze the results.

The results that were found confirmed the hypothesis set out. Both the travel advertising and the tour operators clearly indicated an increase in the number of special interest package tours available. Both research methods attribute this new trend to an increased demand for variety from emerging generations of well-travelled individuals; from individuals who have come to regularly participate in tourism and commonly consider it a routine and necessary part of life; and from individuals whose definition of 'variety' has become increasingly complicated as a result of this enhanced experience.

Both of the research methods also clearly indicate the existence of another significant trend which was not hypothesized in this thesis. They indicate an increased emphasis on economic value. The tour operators attribute this

trend to the economy generally. They attribute it to the devalued Canadian dollar; to the high rates of unemployment; and to the recent recession. Tourist destinations have changed in favour of those with the best value for the dollar. There has been an increase in both long and short term vacations as a result of more time available due to unemployment but less money available for long trips. And there has been an increased consciousness of cost by those affected by the recession.

Thus, it is evident that the tour operators surveyed have recognized elements of the external environment to have influenced tourism and have recognized how these elements have determined the trends described. They have recognized the direct determinants of tourism trends. They have not, however, identified modern technology and modern values as having been the cause of the economic and social conditions that have given rise to contemporary tourism trends. They have not identified the emphasis in economic value as a result of changing work and leisure ethics. They have not identified the more fundamental changes in society that ultimately affect tourism.

6.3 Conclusions of the Thesis Research

The thesis research has established that there is an increase in the number of special interest package tours available. It has established that there is an increased emphasis on economic value. It has established that external elements have determined the direction of tourism trends. It has also established that the tour operators surveyed, although

aware of direct causes affecting package tours, are not aware of the broader environmental causes.

The consequence of this limited scope of research and knowledge is a similarly limited ability to deal with and satisfy the demands of the tourist. The tourist is the primary and most essential element of tourism. Without the tourist, there can be no tourism or package tours. What the tourist demands, therefore, is crucial not only to the tour operator, but also to all aspects of the industry. In a more general sense, the tourist is a subset of people and people constitute society. Tourists, therefore, are a part of society. And it is, therefore, feasible and likely that the activities of the tourists are in some way related to their role in society and the way in which their changing society has affected them. As they are affected by a technological reformation of the work world and a societal redefinition and emphasis on leisure, they, in turn, affect tourism with new demands corresponding to the new situations. If tour operators are not aware of, nor acting on, new demands and new situations, their companies will suffer. It is a function of their business, of any business, to satisfy the customers' needs. If it does not, it cannot survive. Evidence of the tour operators' inability to sufficiently satisfy their customers is found in the instability of the industry.

What the tour operators must do to maintain their clients' business is to recognize the effects of modern technology and changing social values on the tourist as a member of society.

They must recognize the decreasing emphasis on work and the increasing emphasis on leisure. They must recognize that leisure has grown in importance. It is no longer the time left to recuperate from and for work. It is more and more an important determinant of the quality of life. The tour operators must recognize that leisure no longer simply complements work.

Recognizing these shifting emphases will allow the tour operators to better understand the needs of their clients. It will help them to better understand and satisfy the new demands for value and variety.

The tour operators surveyed have indicated that they have recognized and responded to the demand for value (a fact supported by the travel advertising) by producing the all inclusive or 'bare-bones' packages. They are beginning to satisfy the demand for variety by catering to the special interests of tourists. But, as special interest tours necessarily cater to smaller groups of tourists, the tour operators must increase the cost in order to maintain a sufficient profit margin. The variety demanded, therefore, seems to contradict the value demand. There are those, however, who have not yet been affected by the poor economic conditions or who have not been affected to a great extent. There are still those who have the disposable income necessary for the more costly packages. It is these people who can and will purchase the new special interest package tours. It is the allocentrics described in S. Plog's continuum (Chapter 2) that

will want to experience what is at the leading edge of the market. But, as the research shows, the variety component is highly valued generally, not only by particular market segments. The tour operators should, therefore, accommodate this general demand by introducing more variety and even special interest aspects into their existing tours. Or they should incorporate one or a few special interest packages into their repertoire of tours. The tour operator should work toward the satisfaction of today's tourists' demands.

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Appendix 1

Correspondence Between the Researcher and the
Personally Interviewed Tour Operators

Carleton University
Ottawa, Canada K1S 5B6

Tourism is a fast growing, dynamic industry. Where it has been and where it will go seems closely connected with those events and values which are contemporary. Package tours (IT's), as part of that industry, are similarly subject to contemporary trends. One such recent trend seems to be an increase in the availability of package tours catering to the special interests of the tourist.

In view of your knowledge of the tour operator/wholesaler industry, I am hoping that I might have an opportunity to speak to you directly regarding this subject.

I am a graduate student at Carleton University, Ottawa. It would assist me immensely in my thesis research if you could find a few spare minutes of your busy schedule to see me. I am hoping that, with your help, my research will provide some indication of the current and future trends of package tours as well as what factors might affect or determine these trends. If desired, I would be happy to provide you with a brief, generalized summary of my results once my thesis is completed.

I will be in the Toronto area during the week of July 14-18, 1986 (longer if necessary). I hope I am not being presumptuous in saying that I will call you when I arrive in Toronto in the hopes of making an appointment to see you on this matter.

If you have any questions, please feel free to contact me at 564-2611/237-0116 or the Department of Geography at 564-2641.

I am looking forward to meeting with you.

Sincerely,

Carol Chovanec

Carleton University
Ottawa, Canada K1S 5B6

In reference to our meeting, I wish to express my appreciation for your having taken time out of your busy schedule to talk with me. Your answers and observations have provided me with valuable and useful information for my Master's thesis.

When I have completed my research, I will send you a copy of a brief, generalized summary of my findings.

Many thanks for sharing your knowledge and experience and for offering your assistance.

Sincerely,

Carol Chovanec

Appendix 2

Mail-back Questionnaire and Accompanying Letter

Carleton University
Ottawa, Canada K1S 5B6

I am a Master's student in Geography at Carleton University in Ottawa. Through my research, I have learned that tourism is a fast growing, dynamic industry. Its past and future success appears to depend on adapting to contemporary values. Package tours, in particular, seem to reflect changes in public taste. One recent trend seems to be an increase in the number of package tours which cater to the specialized interests of the tourist.

To determine if, in fact, this is the case, I am conducting a survey to obtain opinions and information on the subject of package tours from Ontario based tour wholesalers and operators. The enclosed questionnaire is intended, also, to identify what sort of services and activities are being added or developed to accommodate any demand for these special interest packages; to whom and by whom they are being supplied; and what factors might have played a role in creating this new trend.

This survey is being administered as partial fulfillment of the Master's thesis program. Your knowledge and experience in your field, as well as your comments will be of great value to me in my research endeavours. I will make available the results of the survey to interested parties in the tourism field and your assistance will help in making it more useful to those concerned.

For your convenience, I have enclosed a self-addressed, stamped envelope. I would appreciate it if you could ensure that the questionnaire is returned whether completed or not. Your individual responses will be held in strict confidence.

If you have any questions regarding this matter, please feel free to contact myself at 237-0116, my supervisor Dr. Sr Mackenzie at 564-5622, or the Department of Geography at 564-2641.

Thank-you for your attention.

Sincerely,

(Ms.) Carol A. Chovanec

P.S. If you would like to receive a brief, generalized summary of the results, please indicate so on the following page.

PACKAGE TOUR SURVEY

Note: If you would like a copy of a brief, generalized summary of the research results, please fill in your name, your company name and address below or submit on a separate piece of paper. Your individual responses will be held in strict confidence and only statistical totals will be reported.

name _____
company name _____
address _____

QUESTIONS

If you would like to elaborate on any particular question, or make some general comments, please use the space provided at the end of the questionnaire or the back of the page.

- How long has your company been in existence? _____
- What type(s) of package tours does your company offer? _____
- Inclusive tours _____
- Exclusive tour (barriers) _____
- Special interest tours _____
- Group incentive tours _____
- Business/convention tours _____
- Cruise (please specify) _____
- Please describe your clientele according to:
 - Approximate age group: _____
 - Approximate percentages of males and females: male _____ female _____
 - Level of affluence of majority: high _____ middle _____ low _____
 - Have any of the above changed in the past 15 years?
 - Yes _____ no _____ If yes, please specify how, so and when _____
 - Approximate age group: _____
 - Male/female percentages: _____
 - Level of affluence of majority: _____

- Do your company's package tours focus on particular:

means of transportation? Yes _____ no _____ If yes, please specify _____

destinations/areas? _____

types of activities? _____

- Have any of the above changed in the past 15 years?

Yes _____ no _____ If yes, please specify how, so and when _____

means of transportation _____

destinations/areas _____

types of activities _____

- Please rank the following according to their effect on your company's package tour demand. (i.e. #1 having the most effect; #2 having the next most effect; and so on. Use N/A to indicate no effect where appropriate.)

rank _____ comment _____

- recreation _____

- dollar value _____

- unemployment _____

- energy crisis _____

- terrorism _____

- deregulation _____

- Are package tour clients becoming more demanding/particular about what is included in your company's package tours? _____

Yes _____ no _____

If yes, what are they looking for? _____

- If yes, has your company made adjustments or included additional activities/services in your package tours? _____

Yes _____ no _____ If yes, please specify _____

Please comment on the effects of the following on the package tour industry:

modern technology _____

work ethic _____

leisure society _____

values _____

early retirement _____

female entry/increase in the workforce _____

the public's travel experience _____

Do you see package tours changing in the future?

yes _____ no _____

If yes, how so? _____

Have you noticed a change in the number of special interest tour operators/wholesalers in existence? _____

increase _____ decrease _____ no change _____

Have you noticed non-special interest tour operators/wholesalers offering more variety/ services in their package tours? _____

yes _____ no _____

If yes, please specify what they might be _____

Additional Comments: _____

THANK-YOU FOR YOUR TIME AND COOPERATION!

Appendix 3

Sample Travel Advertisements from the Newspapers
and The Years Analyzed

HAPPY HOLIDAYS

BY MOTOR COACH
 Florida Beach 12 days \$916.50
 Miami Beach 12 days \$916.50
 (including meals)
 California 10 days \$916.50
 and hundreds of others

7 COASTED RAIL TOURS
 California 12 days \$925.50
 Canada's Rockies 12 days \$925.50
 Virginia 7 days \$195.50

BEACH BEACH
 7 days, 6 nights of coast, sand, sun, pool, entertainment, 2 meals daily, 2 sleeping bags, everything from bus to air transport. For prices, see... \$21.50
 Transportation extra
 Budget Plan Available
 44 Wellington St. W.

"HOMERIC is tops!"

6 DAYS from QUEBEC to EUROPE

TO LI HAVEN AND SOUTHAMPTON
 May 28—June 14—July 1-17
 Aug. 3-20—Sept. 6-23
 Oct. 9-26—Nov. 12-29
SEE YOUR TRAVEL AGENT!

HOW YOU CAN AFFORD TO GO ABROAD!

new BOAC SUMMER TOURS

fit your time and travel budget

TO EUROPE OR 'ROUND THE WORLD THERE'S A B.O.A.C. TOUR FOR YOU!

One low tour rate includes your transportation on top-flight B.O.A.C. nearest Supercolonies across the Atlantic and other transportation as applicable abroad. Also smart hotels and most meals as well. You'll find travel and sight-seeing, ready and waiting for you—an exciting holiday at prices you never thought possible.

If you prefer first class, fly B.O.A.C. Montreal-Moscow to London or slightly more. Double-deck "Super-Service" Supercolonies with downmarket lounge... superb seven-course meals.

See your travel agent, rail or bus office or B.O.A.C. offices in Montreal, Toronto, Winnipeg, Vancouver.

17 DAYS \$825.00

(May 17-31) England, Holland, Belgium, France, Switzerland. Your historic Rhodanese country, the London of yesterday and today. English Amsterdam, city of flowers. Go! enlightening in Paris. Wonderful!

25 DAYS \$901

(May 25-49) The Grand Tour to mountain! London, Athens, Cologne, The Rhine Valley, Switzerland, Venice, The Appennines, Rome, Capri, Pisa, Milan, Paris. Fine full weeks to see the exciting heart of Europe.

32 DAYS \$969

(May 32-63) Around the World. Europe, India, Japan, Hong Kong, Japan. Home and home via Vancouver. See the world in fast-moving countries—from the ancient monuments and splendours of the Far East to contemporary life on the Continent.

23 DAYS \$971

(May 23-46) England, Holland, Germany, Switzerland, France. All your dreams of Europe now come true—from the historic Tower of London to the pleasures of the Swiss Alps.

44 DAYS \$1811.00

(May 19-62) Holland, Belgium, Germany, Switzerland, Italy, Greece, Israel, France, England, Scotland. A thrilling tour of the Continent that picks the pay, cultural spots for you to enjoy. Plus the morning High Land.

41 DAYS \$1467.50

(May 28-68) Most Festival and sight tour through England, France, Italy, Switzerland, Belgium, the Edinburgh Festival. Later open to passengers where the world's great show actually is mounted.

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 LAMINGTON HOTEL
 MONTREAL DEPT. 5-15

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 ADDRESS _____
 CITY _____ PROV _____

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Your Rates for SEA-WEEK SPECIALS

July 10 Bermuda, 10 days	\$580.00
July 20 Bermuda, 10 days	\$580.00
July 30 Bermuda, 10 days	\$580.00
Aug 10 Bermuda, 10 days	\$580.00
Aug 20 Bermuda, 10 days	\$580.00
Aug 30 Bermuda, 10 days	\$580.00
Sept 10 Bermuda, 10 days	\$580.00
Sept 20 Bermuda, 10 days	\$580.00
Sept 30 Bermuda, 10 days	\$580.00

TO BERMUDA Regular weekly sailings from New York, round trip \$250 up. Fare includes berth, meals and entertainment on board. 4 glassies, round-trip \$250 up.

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 Professionals in Pleasure Cruises
 215 St. Lawrence Street, Montreal, P.Q.

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 400 Bay Street, Montreal, P.Q.

EUROPE
 The pleasure of a trip abroad...
 41 days 11 countries \$1000.00
 52 days 9 countries \$879.00
 60 days 12 countries \$1000.00
 71 days 11 countries \$1000.00
 84 days 19 countries \$1200.00
 See your travel agent for details.
 40 Wellington Street, Montreal, P.Q.

EUROPE
\$879 22 Days — Fully Conducted
 Your ALL of Europe—on and off the beaten path. See it all on \$879. These tours departing June 8, June 22, July 6, 11. Here's a genuine European holiday... all on a new Cat liner. See London, Southampton-Ayr, Holland, Great Britain, Belgium, Austria, Vienna, Rome, Florence, C. Sardinia, Naples, Monte Carlo, Paris, and dozens of a morning glass. Minimum price \$879, includes all in expenses. Limited tour capacity to your reservation must apply early. For free "Europe" folder send this Coupon to:
C & B TOURS
 240 Grandview Ave., Toronto 6, Ont.

Do yourself a good turn:

A turn of this ad to the right will show you how to turn 6 days into 3 vacations for only \$108 up on a Farewell "Liv-Aboard" Cruise to Bermuda.

End as perfectly as you began.

Enjoy the cruise back to New York for the happiest ending to your Bermuda vacation. Both ships are fully air conditioned, two luxury First Class staterooms and every stateroom has private bath and telephone.

Enjoy 2½ days in Bermuda.

We're ready to see Bermuda the moment you arrive. No waiting. The ship is your convenient clubhouse in Bermuda. Swim, golf, explore, shop, eat, do it all.

Take a great ocean cruise.

As soon as you're welcomed to the Queen of the Seas, you'll be ready to enjoy the best of Bermuda. The ship is your convenient clubhouse in Bermuda. Swim, golf, explore, shop, eat, do it all.

WORLD CRUISE
ABOARD THE WORLD FALL
CRUISE CRUISE VIA THE
"WORLD CRUISE"
94 DAYS—DEPARTING
OCTOBER 15, 1965
C. Lyndon England, Captain
M. J. Lyndon, Assistant
M. J. Lyndon, Assistant
M. J. Lyndon, Assistant
The cruise is POSSIBLY
CONDUCTED and includes
staterooms, meals, and
Porter from Toronto back to
Toronto from \$1975.00
Cash funds

WORLD CRUISE
ABOARD THE WORLD FALL
CRUISE CRUISE VIA THE
"WORLD CRUISE"
94 DAYS—DEPARTING
OCTOBER 15, 1965
C. Lyndon England, Captain
M. J. Lyndon, Assistant
M. J. Lyndon, Assistant
M. J. Lyndon, Assistant
The cruise is POSSIBLY
CONDUCTED and includes
staterooms, meals, and
Porter from Toronto back to
Toronto from \$1975.00
Cash funds

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