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# Earlier voyages and future destinations in the study of tourism

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## Earlier voyages and future destination in the study of tourism

*Abstract.* This essay serves as the introduction to the issue of *Apuntes* dedicated to tourism. It defines the activity, provides a short history of its development, and revisits academic debates about the significance and consequences of tourism. Additionally, the essay reviews the achievements in the study of tourism in Latin America and Peru in particular, suggests possible future avenues of research, and describes the contributions of the articles included in this issue of *Apuntes*.

*Keywords:* Tourism; history; Latin America.

We are finally witnessing a wave of new studies about tourism in Latin America and the world. In truth, the burgeoning academic interest in this topic should not be a surprise if we consider tourism's economic impact. The most recent World Tourism Organization (UNWTO, 2018) figures show that in 2017 there were 1,326 million international tourist arrivals, and that the industry generated US\$1,340 billion; moreover, it is estimated that one in every ten jobs are connected with tourism, and that the industry generates 10% of the world's gross domestic product (GDP). In 2017, Peru received more than 4 million tourists from abroad, while income from tourism was valued at US\$3,710 million (World Tourism Organization, UNWTO, 2018). And while the influence of tourism may be more difficult to quantify, its role in society, the environment, culture, and many other aspects of modern life is notable.

One very positive aspect of studies on tourism is that they are not limited to any one discipline or geographical region. Thus, the study of this activity gives us a unique opportunity to share the methods and perspectives of different academic disciplines. At the same time, understanding the development and the consequences of tourism on the world allows us to understand its global and local effects together. This issue of *Apuntes* reflects on these positive trends in the study of tourism, and includes a collection of articles from various disciplines that focus on different areas and eras in Latin America.

I think that the authors of the articles in this issue are in the best position to illustrate the possibilities and benefits of studying tourism. However, in this introduction, my goals are to: provide readers with a definition of tourism; present a brief history of the development of its development; summarize how the academic community has researched this topic and evaluated its consequences; and describe debates related to tourism in Latin America and, particularly, Peru. Finally, I suggest a few topics and challenges that, in my opinion, can serve as research questions for future studies on tourism.

I hope that this introduction and each of the articles in this issue of *Apuntes* gives readers an idea of what can be gained from the critical study of tourism. At the same time, I trust this issue makes it clear that there is still a need for much more research on tourism, which is a promising field of study for those who recognize that there is much more to it than mere recreation.

## Defining tourism

Any type of tourism is defined by the experience of travel. However, it should be noted that tourism is a specific form of migration. Many different definitions of tourism and tourists have been proposed, but I believe that the characteristics that Valene Smith (1977/1989b) outlines in the introduction to her influential anthology on tourism, *Hosts and Guests: The Anthropology of Tourism*, continues to serve as a useful definition. According to Smith (1977/1989b, p. 1), tourism is marked by the presence of three fundamental factors: a) leisure time; b) discretionary income; and c) positive local sanctions. While Smith identifies the characteristics of tourism in her definition, anthropologist Nelson H. H. Graburn (1989) employs the experience and the context of tourism in order to define it. Graburn theorizes that it is a modern version of the dichotomy between the sacred and the profane, proposed by Durkheim. Tourism is the sanctioned interruption of modern life, just as religion was in earlier times. Not working is regarded as idleness by modern society; however, traveling to a different place and avoiding work for tourism is approved, and often admired, by society. This difference is what defines tourism, according to Graburn. Obviously, there are many perspectives that can be used to define tourism. However, there is a general consensus that tourism involves voluntary travel for the purpose of recreation – unlike migrations associated with asylum, economics, or religion.

There is also much debate regarding how to categorize different types of tourism. Smith (1977/1989b, pp. 4-6) breaks them down into five categories: ethnic, cultural, historical, environmental, and recreational tourism. Ethnic tourism is centered on visits to indigenous cultures and peoples that tourists consider “exotic.” Cultural tourism is defined by trips to encounter the picturesque or folkloric; artisanal arts and practices are also considered to be part of the cultural tourism offer. Historical tourism is defined by museum-cathedral circuits as well as archaeological sites. . Environmental tourism is focused on trips to explore nature. And, finally, recreational tourism is categorized by many as “sand, sea, and sex” and is identified primarily with beach resorts, but also includes activities such as golf and gastronomic tourism. It is no surprise that other studies have developed different subcategories of tourism; likewise, it is important to recall that many tourist activities do not fit neatly into any one category, but present characteristics of two or more.

## **A brief history of tourism**

Considering the number of debates about how to define and categorize tourism, it is surprising that there is a consensus that tourism is a modern phenomenon. Most studies trace the origins of modern tourism to 18th century Europe and the appearance of the Grand Tour. This phenomenon, practiced by the children of the British elite and bourgeoisie, consisted in a trip lasting months – and often years – around continental Europe, with Italy as the final destination. The Grand Tour was a highly elitist activity and, above all, was geared toward the study of classical culture. In British society, doing the Grand Tour was a mark of prestige. Although tourists at that time were drawn from a very small group of men from the elite, the Grand Tour had many of the aspects of modern tourism; it involved a voluntary trip with the aim of recreation and conspicuous consumption (Black, 1992; Hudson, 1993; Zuelow, 2016, pp. 14-29). The French Revolution and the Napoleonic Wars temporarily put an end to pleasure tourism in Europe. However, after the conflicts ended, travelers took to traveling around the continent again, reflecting the influence of the Romantic movement of the 19th century in which the most coveted destinations were associated with nature – above all the sea and the mountains – and other symbols of the sublime (Corbin, 1994; Macfarlane, 2003; Zuelow, 2016, pp. 30-43). Although tourism increased throughout Europe in the first half of the 19th century, it remained the preserve of the elites.

The expansion of tourism as a middle- and working-class activity came with the advent of steam transportation. On land, the inauguration of the Liverpool-Manchester line in Britain in 1825 marked the start of commercial passenger railroad services. At sea, the launch of steamboats that same decade and the development of the screw propeller revolutionized maritime transport. In this new age of steam propulsion, it was possible to introduce fixed timetables that allowed travelers to plan their journeys and excursions (Zuelow, 2016, pp. 44-59). One of the most notable pioneers in the use of steam transportation to expand tourism was the Briton, Thomas Cook. On July 5, 1841, Cook organized what many consider to be the first tourist excursion when he chartered a train to take 570 passengers – temperance campaigners – to a teetotal rally. Cook gave passengers the option of purchasing, with one single payment, an excursion in which the costs of all transport, accommodation, and meals were covered. Cook's guides took charge of the itinerary and other transportation details, allowing the tourists to enjoy the travel experience. Finally, by organizing the transportation of large groups of tourists, Cook could negotiate lower prices with the owners of transport companies. By the 1860s, Cook had organized a large number

of trips around Britain and continental Europe; in 1866, he inaugurated a voyage to the United States, followed by tours of Egypt and the Middle East in the 1880s (Hamilton, 2005; Walton, 2010; Zuelow, 2016, pp. 62-66).

While Cook was developing the model for the modern travel agency, the Briton John Murray III and the German Karl Baedeker published the first travel guides. Their books had many of the features that still define tourist guides: suggested itineraries, historical summaries, and restaurant and hotel recommendations. Baedeker invented the rankings system: his guides assigned three stars to sites considered unmissable, and one or two to less important places. The guides made it possible to travel more independently (Koshar, 1998; Pamłowski, 2002; Zuelow, 2016, pp. 77-79), while steam transportation opened up travel to the middle and working classes. In the final decades of the 19th century, improvement in working conditions in industrialized societies, the belief in the healthful effects of the sea, and the rise of mass culture led to the development of beach resorts as destinations. Places such as Blackpool, in England, and Coney Island, in New York, now connected by rail to major cities, flourished as destinations for the working classes (Immerso, 2002; Walton, 1998). Peru, like the rest of Latin America, also witnessed the growth of beach resorts such as Ancón and Chorrillos.

Moreover, with the arrival of the automobile in the 20th century, the middle classes had the opportunity to travel to new places. In many places, national parks, which now had road connections, became tourist destinations. In addition, tourist infrastructure changed in response to personal transportation, which became possible with the invention of the automobile. The emergence of roadside gas stations and motels reflected the expansion of this form of travel (Koshar, 2008; Seiler, 2008).

Capitalist governments began to celebrate tourism as a means of promoting healthy labor and content citizens. Indeed, these countries approved laws and policies that established public holidays and paid leave for workers (Beckerson, 2002; Cross, 1989), while socialist countries, such as the Soviet Union, built recreation camps for the proletariat (Koenker, 2013). Fascist regimes – above all the Nazis, who introduced a state tourism policy known as *Kraft durch Freude* (“Strength Through Joy”) – focused on developing a type of tourism that would promote feelings of nationalism and a healthy population (Baranowski, 2004). The countries of Latin America also favored policies that developed national tourism for the benefit of workers and citizens. In this issue of *Apuntes*, articles by Patricia Vidal Olivares and Fernando Armas Asín investigate tourism in Chile and Peru, respectively.

After World War II, mass tourism took off. This was the golden age of “family vacations.” In the industrialized world, better wages and paid

leave gave families the opportunity to travel. Thus, many traveled by car or train to vacation centers – for instance, the Butlin’s chain in Britain – or destinations such as historical sites or national parks. During this period, vacations were not only experiences of recreation, but acts of affirmation of post-war middle-class consciousness (Dawson, 2011; Rugh, 2008). At the same time, new transnational groups, such as the United Nations and its tourism division, the World Tourism Organization, promoted tourism as a form of development (Zuelow, 2016, pp. 154-55). Semi- and under-developed countries devoted budgets and efforts to fomenting tourism. Thus, the coast of Spain, the city of Acapulco in Mexico, and various Caribbean places emerged as tourist destinations (Berger & Wood, 2010; Pack, 2006). The cruise industry, which took tourists to these new destinations, thrived. In the postwar period, advances in transportation, above all aeronautical technology, boosted the development of tourism by offering quick and comfortable flights for the upper-middle classes and the elites of North America and northern Europe (Zuelow, 2016, pp. 149-164).

However, the most outstanding tourist destinations were marked by a historical phenomenon summed up by the US baseball player, Yogi Berra: “Nobody goes there anymore. It’s too crowded.”

The introduction of low-cost airlines provided the working classes with transportation to new destinations. At the same time, well-established family vacation sites lost their traditional customers, while others, such as Acapulco in Mexico and Benidorm in Spain, lost some of their previous luster (Rugh, 2008, pp. 177-184; Holleran, 2017). More and more travelers – above all new generations and wealthier tourists – desired “authentic” or remote locations. In the 1970s and 1980s, new tourism options focused on nature, adventure, gastronomy, and other specialized activities to cater to new tastes (Butler, 1980). The arrival of social media increased the demand for bucket list-type tourist destinations and experiences – something *sui generis* that could be shared through images and the internet. In response, the mass tourism industry has developed new activities and offers to give tourists more-original experiences.

### **Academic perspectives on tourism**

Despite the growth in tourism in the 20th century, it was ignored by the academic community until quite recently. Curiously, one of the first studies on tourism criticized the activity severely; in *The Image*, first published in 1961, US historiographer Daniel Boorstin (1961/1992), labeled tourism a “pseudoevent.” Boorstin regarded tourism as a consumer activity and judged that this prevented tourists from having real or authentic experiences

(1961/1992, pp. 77-117). The following decade, the 1970s, ushered in a new wave of studies on tourism. Most of the scholars were sociologists, who began to think of tourism as a social phenomenon that required more academic analysis. Erik Cohen (1972) was one of the first to call on his peers in the field of sociology to study tourism. In 1976, the sociologist Dean MacCannel published a seminal work on the topic: *The Tourist: A New Theory of the Leisure Class* (1976/1989). In his book, MacCannell offered many analytical tools for researching tourism. His most influential idea was probably that of staged authenticity. MacCannell dismissed Boorstin's theory that tourists sought to avoid reality, and proposed that modern tourists were looking for authentic experiences rooted and connected with the site and/or the culture of their destinations. However, MacCannell added that modern tourists wanted a **form** of authenticity that corresponded to their cultural expectations, which often did not represent actual conditions (1976/1989, pp. 91-107). For instance, when international tourists arrived in Cusco, they expected to see authentic symbols and sites that represented what they considered to be the meaning of the culture of Cusco: Machu Picchu, indigenous communities, displays of Andean fabrics, etc. Consequently, tourists had no interest in the real-life experiences of many of the residents of Cusco – or at least the city Cusco – who wore jeans, took the bus to work, and spent their free time in shopping malls. Despite representing the life of many Cusco residents, these cultural aspects do not correspond to the staged authenticity that tourism presents to visitors.

But if sociological works, such as that of MacCannell, were among the first to study tourism as a social phenomenon that warrants academic analysis, the main aim of these studies was to analyze tourism from the perspective of the tourist. For these studies, the desires of tourists illuminated truths about postmodern society. However, there was little analysis of the effects of tourism on the communities receiving the visitors, and on the places where these activities unfolded. To remedy this, anthropologists began to study the social and cultural effects of tourism from the perspective of actors in the industry, such as workers or owners of accommodations. The anthropologist Valene Smith published a seminal anthology in 1977: *Hosts and Guests: The Anthropology of Tourism* (1977/1989a), which includes a collection of theoretical and ethnographic essays. In this work, anthropologists reflect on the effects and consequences of tourism. For example, Dennison Nash (1977/1989) suggests that tourism is a type of imperialism, while in the same collection, Margaret Byrne Swain (1977/1989) presents an ethnographic study about the Kuna culture in Panama, concluding that tourism had helped preserve the indigenous culture of this ethnic group. Meanwhile, in

his study of the case of tourist development in Bali, Philip Frick McKean (1977/1989) observes that no culture is static, and that the influence of tourism can both modify and preserve indigenous and cultural features.

Eventually, historians also discovered tourism as a field of study. Their studies evidence the influence of the sociological and anthropological works already published. It is also important to note that most research of this issue began during or after the “cultural shift” in the discipline. Thus, historians were very receptive to analyzing the cultural artifacts of tourism – guides, books, testimonies, and images – as important sources for constructing identity, policy, and political sentiments. A book by the influential historian John F. Sears, *Sacred Places: American Tourist Attractions in the Nineteenth Century* (1989) stressed the importance of tourist sites in the formation of incipient US identity. Another important book was written by Donna Brown, *Inventing New England: Regional Tourism in the Nineteenth Century* (1995). Brown documented how tourism aided in the creation of the regional narrative that celebrated New England as the birthplace of US history and culture. Soon after, a new wave of historical studies were published about tourism and national identity in the United States and its regions (Shaffer, 2001). At the same time, Rudy Koshar (1998, 2000) published various studies on the development of tourism in Germany, and its influence on the formation of nation states. His work influenced other studies of tourism and national identity in European countries, such as Ireland (Zuelow, 2009) and France (Endy, 2004).

Historians too have not ignored social and economic questions. Indeed, one of the most influential works was Hal Rothman’s *Devils Bargains: Tourism in the Twentieth-Century American West* (1998). Rothman observes that the communities that supported the development of tourism did not benefit because, ultimately, commercial interests took control of local leadership and marginalized the original inhabitants. Rothman concluded that any population that backed tourist development was entering into a “devil’s pact” (1998, p. 11). Other historians, such as Rugh (2008), also focused on tourism in terms of consumption, citizenship, and class. Moreover, in recent years there have been some excellent books about the history of LGBTQ tourism<sup>1</sup> (Capó, 2017).

Finally, I have yet to mention studies on the technical and commercial aspects of tourism. In fact, these are more numerous than sociological, anthropological, and historiographical studies. In 1922, Cornell University

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1 Lesbian, gay, bisexual, transgender and queer persons.



funded one of the first university programs dedicated to study and professional training for the hotel industry – The School of Hotel Administration. Since then, many universities, institutions, and governments have funded schools and faculties devoted to the study of tourism as a technical and commercial field. The journal *Annals of Tourism Research* first appeared in 1973, and has since established itself as a source of studies about the practices and development of tourism; it also publishes a large number of studies written from the perspective of the liberal arts. Other journals have since emerged to focus on more specific dimensions of the study of tourism, such as *The Journal of Tourism History*.

It is difficult to predict future approaches in the field of critical studies of tourism, even if there is already evidence of new academic focuses. For example, in recent years there have been studies on the phenomenon of dark tourism by researchers from the fields of history, cultural studies, business, and others, which analyze the development of tourist attractions famous (or infamous) for their problematic history. Sites of massacres, cemeteries, and genocides such as the Holocaust now attract visitors not because they are sites of recreation but, on the contrary, as markers of dark moments in human history (Hartmann, Lennon, Reynolds, Rice, Rosebaum, & Stone, 2018).

### **The study of tourism in Latin American and Peru**

In Latin America, anthropologists, above all ethnographers, were the first to undertake studies of tourism (Evans, 1979). Much of the early research investigated its effects on indigenous communities, with emphasis on issues of cultural identity. The vast majority of the first studies centered on Mexico and Central America (Byrne Swain, 1977/1989; Van den Berghe, 1995; Kroshus Medina, 2003). However, anthropologists soon turned to other parts of Latin America, and now there are many studies on the social effects of tourism on local and national identity throughout the region (Babb, 2011). It is not possible to cite all of these ethnographic studies; suffice it to say that many ethnographic studies continue to be published, and that tourism remains a rich field of analysis (Salas Landa, 2018).

There are other ethnographic approaches to tourism. One important theme is the environment (Carruyo, 2007; Horton, 2009). Another is gender. For example, many studies have analyzed how women have entered the tourist economy through the market for handicrafts (Eber & Rosenbaum, 1993). Sex tourism has also been the subject of many studies of tourism in Latin America, analyzing this problem from legal (Cabezas, 1998) and racial (Fernandez, 1999) perspectives in relation to the women concerned.

Other research has analyzed the sexual and romantic connections between female tourists and local men in the Andes (Meish, 1995) and the Caribbean (Phillips, 1999).

The historians of Latin America also have discovered tourism as an academic field of study. In 1997, Rosalie Schwartz published one of the first studies on the history of tourism: a book about the development of this sector in Cuba. Naturally, Mexico has also been the focus of research on the history of tourism. Dina Berger (2006) wrote one of the first books on the topic; and, along with Andrew Wood (Berger & Wood, 2010), coedited an excellent anthology dedicated to tourism in Mexico. An important subject of many histories of tourism has been on the influence of US power – on economies and cultures and in terms of imperial power – by way of the development of tourism in the region (Cocks, 2013; Merrill, 2009; Ruiz, 2014). It is also important to note that most historical studies of tourism were conceived after the “transnational shift” in the field of history, so most of them employ the transnational perspective in their analysis. This phenomenon – in my view optimal for the study of tourism – has introduced transnational perspectives to the analysis not only of foreign relations, but also of regional history (Covert, 2017).

Finally, I would like to note the achievements of the study of tourism in Peru, whose trajectory has reflected international trends. The first studies published were in the fields of anthropology and ethnography, including the research of Pierre L. van den Berghe (1980) and Gerardo Lovón Zavala’s (1982, 1986) analyses of the cases of Cusco and southern Peru in the 1980s. Given its influence on Peruvian tourism, it is no surprise that Cusco has been the focus of these studies (Van den Berghe & Flores Ochoa, 2000). Anthropologists such as Helaine Silverman (2002, 2008) and Karin Bosman (2006) have also published articles on tourism in Cusco; while Marisol de la Cadena (2000, pp. 272-305) and Zoila Mendoza (2008, pp. 65-91) dedicate parts of their excellent studies to the regional culture of Cusco. Other studies center on debates related to the environment, employment, and politics in the areas around Machu Picchu (García, 2018; Luciano, 2018; Maxwell, 2012). Finally, I recently published a study on the history of the development of tourism in Cusco, and its influence on Peruvian national identity (Rice, 2018).

Cusco is not the only focus of studies on tourism in Peru. In fact, some of the most outstanding have analyzed other regions, including Elayne Zorn (2004) and Jorge Gascón (2005), which concentrate on the populations around Lake Titicaca. Other anthropological works have analyzed tourism in Peru’s central Andes (Romero Sihuay, 2005), the north of the country

(Silverman, 2005), and viewed tourism from a national perspective (Fuller, 2009). Moreover, from the perspective of historians, Fernando Armas Asín (2018) has published a general history of national tourism in Peru. It is also important to applaud the large number of studies of the technical aspects of tourism and on tourism planning in Peru, which are too numerous to cite in this introduction (see, for example: Hernández Asensio & Arista Zerga, 2011; Montoya Pérez, 2013; Morel & García, 2014).

### **Future destinations for the study of tourism, and this issue of**

#### ***Apuntes***

If it is not an easy task to review the history of tourism and how the academic world has studied it thus far, it is almost impossible to forecast its future. More importantly, I, as a historian, have a particular aversion to predicting events and trends. But at the same time it is important to stress that there is still much to be done in each of the areas that I have mentioned in this introduction. I would like to note some topics that merit further analysis. First, there is a need for many more studies on domestic tourism in Latin America. Most studies analyze the effects of the arrival of foreign tourists on Latin American communities. However, we know that many countries have developed policies to promote domestic tourism. It is important to study the history of these endeavors, their consequences for the host communities, and whether there are differences between domestic and international tourists. For example, we know a good deal about the interactions between Cusco residents and foreign tourists, but far less about experiences with tourists from Lima or other regions of Peru.

Second, we need more studies analyzing Latin Americans as tourists. In many analyses, Latin American actors play the role of workers and hosts, or that of other types of actors serving tourism. However, we know that Latin Americans themselves travel to other parts of the world. It would be useful to understand the tourist experiences of Latin American travelers – past and present – and the possible similarities and differences between these experiences and those of travelers from elsewhere in the world. What were the experiences of these travelers, and what effects do these experiences have on their self-identity? How did they see their native countries afterwards? To give an example, it would be interesting to learn of the impressions of Mexican tourists who visit the Mexico Pavilion at Epcot, Disney World. What was their reaction when they saw their tourist interpretation of Mexico, and how did they feel as Mexicans when they participated in this interpretation?

Third, it would be of great interest to see how different disciplines analyze the phenomenon of social media in the tourist experience. I suggest that those who study tourism have been at the forefront in terms of understanding the factors associate with the use of social media today. Decades before Facebook, Twitter, and Instagram, concepts such as MacCannell's "staged authenticity" (1976/1989, p. 91) and the "tourist gaze" of John Urry and Larsen (2011) foresaw many of the elements that define social media. However, I believe that there is much to investigate about the effects of social media on tourism.

Finally, an important challenge for those who study tourism is to rethink and expand our definition of the subject. Our concept of tourism is based on definitions that originated in Europe. Consequently, our studies on tourism – until the advent of critical studies – have continued to define this activity from the European and North American perspective. As such, it is difficult to discern or study other forms of recreation that do not correspond to the typical characteristics of what we define as tourism. I think it is time to employ Dipesh Chakrabarty's concept of "provincializing Europe" (2000), which stresses that European perspectives should not be treated as universal. It would be revealing to determine whether there are multiple concepts of tourism in populations and groups on the fringes of what most studies consider to be the modern world. Or perhaps tourism can only exist in modern societies? All the same, I believe that there is an important debate to be had before we can expand our concepts and, hopefully, include new groups and activities in studies of tourism.

I am happy to note that many articles in this special issue of *Apuntes* refer to these new subjects in the study of tourism. Three studies tackle the history of the development of domestic tourism in Latin America and, what is more, in countries that remain little-studied. Patricia Verónica Isabel Vidal Olivares analyzes the efforts of the Chilean state in promoting tourism in the first half of the 20th century; Fernando Armas Asín studies the attempts, and failures, of the Peruvian state during the same period; finally, Ernesto Capello refers to the case of the equatorial line in the outskirts of Quito. Using history and interviews, Capello analyzes how certain entrepreneurs have influenced tourism and identity in Ecuador.

This issue also contains research on other aspects of tourism. Phie van Rompu studies the influence of tourist guides on the redefinition and revalidation of the image of the favelas of Río de Janeiro; Blanca Reyna Olguín-Negrete and Tomás Cuevas-Contreras present a technical study of tourism in Sonora, Mexico, analyzing the influence of branding efforts on the definition and development of tourism in the city of Hermosillo; and

finally, Felipe Luis Garcia's study explores how tourism has influenced the trajectory of the museification of urban centers. Each of these contributions reflects not only the diversity of studies on tourism, but also the possibilities this research presents for discovering new perspectives. We have many destinations still to visit in the study of tourism.

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