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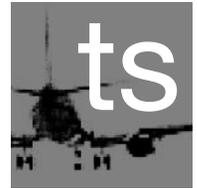
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# Cancun's tourism development from a Fordist spectrum of analysis

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**abstract** Tourism scholars in recent years have posited a global paradigmatic shift from Fordist to more post-Fordist and neo-Fordist modes of tourism production and consumption. This article provides a brief literature review of transformations in global tourism production and consumption from a Fordist spectrum of analysis. Following a discussion of tourism development in Cancun and the surrounding state of Quintana Roo, this article draws on empirical data from a survey of 615 visitors to the Yucatan Peninsula and 60 Cancun hotels to provide a contextual application of the Fordist spectrum in understanding the nature of tourism production and consumption in the region. Cancun is situated as a predominately Fordist mass tourism resort, however, analysis reveals that the region's tourism landscape, which is experiencing processes of diversification, is in reality a complex combination of both Fordist and post-Fordist elements manifest in different 'shades' of mass tourism, 'neo-Fordism' and 'mass customization'. The article concludes that the Fordist spectrum of analysis provides a useful perspective from which to examine the changing nature of tourism production and consumption.

**keywords** *consumption neo-Fordism post-Fordism production Cancun Quintana Roo Yucatan*

## Introduction

Global capitalist development has undergone significant transformations over the past few decades (Amin, 1994). Scholars have posited a shift from a predominately Fordist model of capitalistic development to the emergence of post-Fordist and neo-Fordist modes of production and consumption. The tourism industry, an integral component of the global capitalist order, has not been immune to these changes. Mass tourism is a form of Fordist production and consumption that has experienced dramatic growth since the Second World

War. While there is a wide diversity of attractions and activities that comprise mass tourism, it is characterized by large numbers of tourists consuming highly standardized, packaged and inflexible tourism products. In an uncanny reflection of contemporary evolution in the industrial sector, several researchers have suggested a recent paradigmatic shift in tourism production and consumption towards more post-Fordist forms of specialized, individualized, small-scale and flexible tourism (Milne and Ateljevic, 2001; Mowforth and Munt, 1998; Shaw and Williams, 1994; Smeral, 1998; Urry, 1995; Vanhove, 1997; Williams and Shaw, 1998). Post-Fordist tourism represents a movement from the classic, mass tourism 'sun-and-sand' or 'ski resort' products to more diversified tourism commodities that fix the 'tourist gaze'<sup>1</sup> upon unique environmental, cultural and social landscapes. Others put forth the notion of 'neo-Fordism' to describe recent transformations in the tourism industry which propose that, rather than a complete break with Fordist production and consumption, mass tourism is becoming characterized by increasing individualization, flexible specialization, niche market segmentation and mass customization (Ioannides and Debbage, 1998). In reality, the boundaries between these different modes of tourism production and consumption are more blurred than these categories would suggest, with many of the world's tourism landscapes embodying a complex *mélange* of pre-Fordist, Fordist, post-Fordist and neo-Fordist elements co-existing over time and space.

On its surface, Cancun – an 'instant resort' (Butler, 1980) constructed in the Yucatan Peninsula during the early 1970s – appears to be the archetype of a Fordist, mass tourism destination. Each year, millions of middle-class, 'sun-and-sand' tourists on discounted package tours flock to Cancun. A closer examination of Cancun's tourism industry, however, reveals a complex continuum of various shades of mass tourism coexisting with newly emerging forms of post-Fordist tourism, such as ecotourism, historical tourism and ethnic tourism, among others. Mass tourism itself in Cancun has changed, exhibiting greater diversity, consumer choice, flexibility and niche market segmentation consistent with neo-Fordism. This article contends that situating Cancun within the Fordist spectrum<sup>2</sup> of analysis may contribute to a better understanding of the changing nature of tourism development in Cancun and surrounding Quintana Roo. Following a brief literature review, tracing recent transformations in global tourism production and consumption as conceived by the scholars of Fordism, the article discusses tourism development in Cancun and the region as a whole. The article proceeds to draw on a survey of 615 visitors to the Yucatan Peninsula and 60 Cancun hotels to provide a contextual application of the Fordist spectrum of analysis to tourism in Cancun and Quintana Roo. This research seeks to improve understanding of the nature of tourism in the region, as well as demonstrate the utility of the Fordist spectrum of analysis as a framework for conceptualizing shifts in tourism production and consumption.

## The Fordist spectrum of analysis: transformations in tourism production and consumption

### Fordist mass production and consumption

David Harvey, in his seminal work *The Condition of Post-modernity: An Inquiry into the Origins of Culture Change* (1990), situates post-Second World War mass production – or Fordism – within the wider societal context of modernity. Harvey (1990: 135–6) states:

Postwar Fordism has to be seen, therefore, less as a mere system of mass production and more as a total way of life. Mass production meant standardization of product as well as mass consumption; and that means a whole new aesthetic and a commodification of culture.

Harvey goes on to argue that Fordism has been built upon and contributes to the 'aesthetic of modernity'. Harvey's statement could easily apply to mass tourism, which is in effect a Fordist mode of production and consumption that has emerged as a product of modernity. Several tourism scholars have drawn parallels between mass tourism and Fordism, citing shared characteristics such as: product standardization; inflexibility; economies of scale; mass replication; small numbers of dominant producers; and mass marketing to an undifferentiated clientele (Shaw and Williams, 1994; Urry, 1990b; Vanhove, 1997; Williams and Shaw, 1998). The notion of Fordist mass tourism, however, remains ambiguous, with no singular, clearly agreed upon definition. Therefore, it is more fruitful to analyze the characteristics that various researchers ascribe to Fordist tourism, rather than offer an explicit definition (see Table 1 for a compilation of traits).

Fordism is often conceived as being driven by a 'mass production dynamic' (Amin, 1994). Similarly, Fordist tourism is associated with specific mass production characteristics (see Table 1). Typically, mass tourism is characterized by a small number of producers, often transnational corporations that dominate world markets. Power and control lie in the hands of producers rather than consumers (Rojek, 1995; Shaw and Williams, 1994; Urry, 1990b; Williams and Shaw, 1998). Fordist modes of mass production are also conceptualized as rigid, large-scale and highly standardized systems dependent upon economies of scale (Ioannides and Debbage, 1998; Smeral, 1998). One common manifestation of this rigidity in the tourism industry is the highly structured and institutionalized package tour (Ioannides and Debbage, 1998). Also related to economies of scale, mass tourism is highly dependent upon the offering of bargain prices to large numbers of middle-class consumers. Because profit margins are low, high volumes of visitors are required to generate profits (Shaw and Williams, 1994; Vanhove, 1997). The spatial and temporal concentration of Fordist tourism exerts increased pressure on host destination environments, where mass resorts are often constructed in fragile ecosystems (Mowforth and Munt, 1998; Shaw and Williams, 1994). Another indicator of Fordist production is the

TABLE 1. *Fordist spectrum of tourist production and consumption*

<i>Fordist tourism</i>	<i>Post-Fordist tourism</i>	<i>Neo-Fordist tourism</i>
Mass Tourism	Specialized/Individualized/ Customized Niche Market Tourism	Niche Market Mass Tourism
Inflexible/Rigidity	Flexibility	Flexible Specialization
Spatially Concentrated	Shorter Product Life Cycle	
Undifferentiated Products	Product Differentiation	Product Differentiation
Small Number of Producers		Continuity of Fordist Structures/Institutions
Discounted Product		
Economies of Scale	Small Scale or 'Small Batch'	Mass Customization
Large # of Consumers	Consumer Controlled	Consumer Choice
Collective Consumption	Individualized Consumption	
Undifferentiated Consumers	'Better Tourists'	
Seasonally Polarized		
Demand Western Amenities	Rapidly Changing Consumer Tastes	
Staged Authenticity	Desire Authenticity	Desire Reality While Reveling in Kitsch
Environmental Pressures	'Green Tourism'	
'McDonaldization' or 'Disneyfication'	'De-McDonaldization'	Flexible/Specialized 'McDonalized' Product

undifferentiated nature of mass tourism products which tend to be standardized, demonstrating remarkable similarity with respect to facilities, architecture and entertainment (Ioannides and Debbage, 1998; Shaw and Williams, 1994; Smeral, 1998; Urry, 1990b; Williams and Shaw, 1998). A factor contributing to this 'de-differentiation' and standardization is the proliferation of hotel and restaurant franchise chains in mass tourism resorts. Fordist production regimes often construct what Edensor (2001: 63–4) terms 'enclavic' spaces, which are typified by highly ordered, clean, monitored 'environmental bubbles' where tourists are spatially segregated from local workers and cultural manifestations that might be potentially unpleasant.

Harvey's (1990) conceptualization of Fordism (see earlier quote) moves beyond the analysis of modes of production to incorporate consumption-oriented perspectives. Fordism must be understood not only as a system of production, but also as a mode of consumption embedded in the wider context of social relations. There are several consumption-related characteristics associated with Fordist mass tourism (see Table 1). At its most basic level, mass tourism is nearly always characterized by large numbers of tourist consumers, which by definition makes it a system of mass production and consumption (Boissevain, 2000; Shaw and Williams, 1994; Vanhove, 1997). It is a form of collective consumption, which is marketed to an undifferentiated clientele (Vanhove, 1997). Mass tourists participate in a 'collective tourist gaze', which focuses on 'signposts' designed to congregate tourism consumers (Urry, 1995). Urry suggests that, for the mass tourist, the presence of other people defines the place, and thus the collective gaze 'necessitates the presence of large numbers of other people' (1995: 138). This results in a spatial concentration of mass tourism amenities. The collective nature of Fordist tourism also contributes to the relatively undifferentiated nature of mass tourists. Mass tourism consumers often demand western amenities provided in a protected 'tourism bubble'. Their tastes and preferences are oriented towards the familiar and away from local and indigenous products (Cohen, 1972; Smith, 1989). As a result, mass tourism creates a social and commercial filter that inevitably leads to 'staged authenticity' (Desmond, 1999; MacCannell, 1976). According to Shaw and Williams (1994: 185), 'staged authenticity is an inevitable consequence of the logic of mass consumption and the requirements of capital accumulation'. Authenticity is unable to persevere in the mass tourism milieu (Mowforth and Munt, 1998).

Fordist mass tourism has been linked to theories of 'McDonaldization' or 'Disneyfication' (Ritzer, 1996, 1998; Ritzer and Liska, 1997), which employ both modernist and postmodern<sup>3</sup> perspectives to describe a 'new means of consumption' (Ritzer, 1998). This new means of consumption is characterized by the large-scale, homogenized and standardized production inherent in McDonalds – or in the tourism equivalent, Disney World. Specifically, Ritzer and Liska (1997) apply the 'McDisneyfication' thesis to mass tourism package tours which offer highly predictable, standard, efficient, calculable and controlled vacations. Others support this vision, emphasizing the homogenization and uniformity of globalized cultures manifest in new regimes of consumption (Howes, 1996; Mowforth and Munt, 1998). Ritzer and Liska (1997) suggest that people travel to other places to experience what they already experience in their daily routine lives. They contend people 'want their tourist experiences to be about as McDonaldized as their day-to-day lives' Ritzer and Liska (1997: 99).

### Shift towards post-Fordist tourism production and consumption

Various scholars contend that there have been recent transformations in global capitalism, manifest in shifts from rigid, standardized, large-scale Fordist modes of production and consumption to more flexible, specialized, smaller-scale

post-Fordist modes (Britton, 1991; Gupta and Ferguson, 1992; Harvey, 1990; Ioannides and Debbage, 1998; Mowforth and Munt, 1998; Urry, 1990b, 1995). Amin conceptualizes these notions as the 'post-Fordist debate', which in reality represents a 'confrontation of diverse viewpoints, a heterogeneity of positions' (1994: 5), rather than a clearly agreed upon and definable trend. This shift to post-Fordist production and consumption can, in part, be attributed to global restructuring, related to increased globalization and transnationalism as well as to more specialized and changing consumer tastes. The emergence of post-Fordism has affected social and economic processes on a global scale, including reconfiguring the relations of tourism production and consumption (Ioannides and Debbage, 1998; Urry, 1990b, 1995).

As with Fordist tourism, post-Fordist tourism production and consumption is an ambiguous and often contested notion. There are, nevertheless, several specific characteristics that academics ascribe to post-Fordist modes of tourism production and consumption (see Table 1). Increased specialization, individualization and customization in production and consumption are common traits associated with post-Fordism. With rapidly changing and more diversified consumer tastes, highly segmented specialty niche markets emerge. Edensor (2001: 61) suggests that a 'fragmentation of tourist specialisms into niche markets entails a proliferation of stages, activities and identities'. Products are individualized, customized or tailor-made to meet individual preferences (Harvey, 1990; Ioannides and Debbage, 1998; Mowforth and Munt, 1998; Poon, 1989, 1994; Shaw and Williams, 1994; Smeral, 1998; Urry, 1990b, 1995; Vanhove, 1997; Williams and Shaw, 1998). Post-Fordism is manifest in a wide diversity of highly differentiated products such as ecotourism, cultural tourism, rural tourism, agrotourism, archeo-tourism and 'danger' tourism, among others (Mowforth and Munt, 1998). These are the antithesis of the mass-produced holiday. Post-Fordism reflects the proliferation of tourism products and objects upon which to gaze, providing consumers with an increasingly wide spectrum of choices (Liebman Parrinello, 1996; Mowforth and Munt, 1998; Poon, 1989; Shaw and Williams, 1994; Urry, 1990b, 1995; Vanhove, 1997; Williams and Shaw, 1998). This growth of choice in the post-Fordist era significantly empowers consumers, giving them much greater control than they had under producer-dominated Fordism. Ultimately, it is consumer preferences and tastes which define the post-Fordist tourism product (Ioannides and Debbage, 1998; Poon, 1994; Urry, 1995; Vanhove, 1997; Williams and Shaw, 1998).

Increased flexibility is a key defining characteristic of post-Fordist modes of production and consumption (Harvey, 1990; Ioannides and Debbage, 1998; Milne and Ateljevic, 2001; Pigram and Wahab, 1997; Poon, 1994; Smeral, 1998). This is manifest in less structured, independent and flexible forms of tourism (Urry, 1990b, 1995; Vanhove, 1997). Flexibility is the antithesis of the highly structured, rigid mass tourism, package tour. The combination of more flexibility with respect to free time allocation and choice of tourism products in the post-Fordist era has resulted in more frequent short-haul holidays (Williams and

Shaw, 1998). Ioannides and Debbage (1998) also note an increased flexibility in hotel management and subcontracting arrangements, leading to a move away from direct ownership. They also point to the high degree of outsourcing for ancillary support activities by certain sectors of the industry (i.e. catering, laundry). With consumer tastes now changing more quickly, and new fashions, trends and innovations emerging daily, flexibility in tourism production has become a prerequisite in the post-Fordist era (Urry, 1995) which is characterized by increasingly short product lifecycles (Harvey, 1990). The inherent flexibility of post-Fordism is also facilitated by the generally 'small-batch' (Harvey, 1990) – or, in the case of tourism, 'small-scale' (Milne, 1998) – nature of post-Fordist production and consumption. This smaller-scale tourism is consistent with the 'low impact' or 'green' tourism orientation of many post-Fordist tourism products.

Post-Fordist tourism is typically associated with a wealthier, better educated, mature and more 'desirable tourist' (Milne, 1998). The post-Fordist tourist is considered to be more responsible and to have a greater interest in local culture and the environment. S/he is more flexible, independent, 'green' and interested in discovering the 'other'. This tourist is also more adventurous and willing to try new experiences and products (Mowforth and Munt, 1998; Poon, 1993; Vanhove, 1997). The post-Fordist tourist seeks out the untouched, the authentic, the pristine and the indigenous.

### Challenges and alternatives to post-Fordism

The theorization of emerging post-Fordist modes of production and consumption has not gone unchallenged. Amin (1994: 3) contends: 'reliance on sharp distinctions between phases has been criticized for falling prey, in its worst applications, to a logic of binary contrasts between, rigid or collective "old times" and flexible or individualistic "new times"'. . . . Ioannides and Debbage (1998: 107) argue that many post-Fordist theorists exhibit a ' . . . tendency to view the shift from Fordism to flexible specialization in manufacturing as unidirectional, and their insistence that one has to choose either Fordism *or* post-Fordism without "recognition of the intermeshing of different production systems in both time and space" (Yeung, 1994: 465)'. Also problematic is the tendency for theorists to equate the notion of flexible specialization (or flexible accumulation) with post-Fordism (Ioannides and Debbage, 1998; Malecki, 1995). This fails to recognize the ability of Fordist modes of production and consumption to become highly specialized and flexible, while retaining a mass scale.

Ritzer (1998), in his McDonaldization thesis, broaches this apparent weakness in post-Fordist theory by suggesting that even niche market products can be McDonaldized, pointing to high-end, specialty market products such as Starbucks or micro-brewery beer chains. He also suggests that McDonaldization and the growing diversity inherent in post-Fordism are not necessarily mutually exclusive. With respect to tourism, Ritzer and Liska (1997) agree with Urry. They argue that, while rigidly standardized tours (the epitome of Fordist

tourism) are on the decline, the package tour remains 'alive and well'. The difference is that consumers have a wider diversity of choices, and the tours of today are more flexible than their predecessors. Ritzer (1998) suggests that, rather than deMcDonaldization, we are seeing 'mass customization' – a new form of more flexible McDonaldization, oriented towards smaller-scale production of higher-end goods, and targeting specialty markets. He contends that the basic elements of McDonaldization continue to exist within this new trend: efficiency, predictability, calculability and substitution of non-human technology (Ritzer, 1998).

Ioannides and Debbage cite examples from the industrial sector to illustrate flexibility within Fordist modes of production, wherein firms are able, as necessary, to adopt more flexible production techniques. They contend that 'flexibility distinguishes neo-Fordist production systems from earlier Fordist practices' (1998: 101), allowing greater product differentiation and specialization. Ioannides and Debbage draw an analogy between the industrial sector and Fordist elements of the tourism industry which exhibit emerging flexibility, referring in particular to travel firms and hotels that have developed sophisticated product differentiation and market segmentation. They point to large international hotel companies which have developed niche brands targeting specialized market segments. They also note the increasing trend for transnational firms to utilize more flexible forms of management such as contract and franchise agreements. Ioannides and Debbage, drawing on Dunford and Benko (1990) and Malecki (1995), suggest that 'neo-Fordism' is a better term than post-Fordism because it more accurately describes the enhanced flexibility evolving in traditionally Fordist institutions and sectors within the travel industry (see Table 1). Williams and Shaw (1998) suggest that Fordist mass tourism is more likely to adapt than to disappear, offering greater flexibility, individualization and choice to consumers. They also contend that mass tourism will continue, but destinations will rise and decline at an accelerated rate (Shaw and Williams, 1994).

Portrayal of the tourists themselves becomes problematic when Fordism and post-Fordism are represented as a binary logic. Feifer (1986) describes a 'post-tourist' that defies the Fordist-post-Fordist dichotomy by exhibiting traits associated with both Fordist and post-Fordist modes of consumption. The 'post-tourist' shares the desire for 'authenticity' and diversity with the post-Fordist tourist, while also embracing – as do Fordist tourists – staged experiences and heavily commodified spaces. Feifer's 'post-tourist', similar to Urry's (1990a) 'post-Tourist', revels in the lack of authenticity as a form of kitsch. Hawkins (2001) builds on Feifer's notion of the 'post-tourist', distinguishing between 'mainstream' and 'alternative' post-tourists. He describes a wide range of specialization and niche marketing practiced by all-inclusive resorts in Jamaica which offer 'mainstream post-tourists' a diversity of thematicized enclaves, reconstructing images ranging from Rastafarianism to colonial heritage, depending on the individual tastes of tourists. The 'mainstream

post-tourist', as well as the specialized resorts depicted by Hawkins, appear to embody elements of Fordist, post-Fordist and neo-Fordist modes of production and consumption.

Ioannides and Debbage (1998: 108) contend that rather than a chronological break between Fordist and neo-Fordist activities, the tourism industry, with its 'permeable boundaries' and diversity of 'linkage arrangements', has developed a 'polyglot of multiple incarnations' exhibiting varying degrees of flexibility. They argue that, while certain elements of the tourism industry maintain their Fordist characteristics (rigid, standardized, mass market), even these attempt flexibility. Most importantly, their analysis suggests that all elements of the Fordist spectrum – pre-Fordist, Fordist, post-Fordist and neo-Fordist modes of production and consumption – coexist over time and space. The remainder of this article draws on empirical work to examine Cancun – superficially the archetype of a Fordist resort – from the Fordist spectrum of analysis to reveal a more complex, diverse and continually evolving tourism landscape.

## Tourism development in Cancun and surrounding Quintana Roo

In the 1960s, the Mexican government initiated a search for the site of Mexico's first master-planned resort – an important 'experiment' for the implementation of Planned Tourism Development (PTD) as a key component of the nation's new, externally-oriented, economic development policy (Clancy, 1999; Cothran and Cothran, 1998). Cancun, a remote barrier island located in the tropical forest enclave territory of Quintana Roo (which achieved statehood in 1974) along the northeastern coast of the Yucatan Peninsula (see Figure 1 for a map of the region), was selected to become Mexico's first Tourist Integral Center (TIC). During the 1970s, Cancun became an expensive, exotic and exclusive 'sun-and-sand' playground for the international 'jet-set' community. Cancun began to exhibit signs of overdevelopment and loss of exclusivity in the 1980s, as the tourism industry started to offer packages and discounts to predominantly American middle-class tourists in an attempt to fill the exploding number of rooms. With more than 2.6 million visitors per year (FONATUR, 1997), Cancun is one of world's leading tourism destinations and the most popular beach resort in the western hemisphere (Cothran and Cothran, 1998). Cancun is Mexico's most important international resort, capturing 25 percent of all foreign tourists (Mexican Government Tourism Office, 2000) – overwhelmingly the largest market share of any Mexican destination.

Hiernaux-Nicolás (1999: 131) suggests that, until the mid-1980s, 'Cancun could be considered as the paradigm of a totally Fordist tourist resort, if Fordism is defined as large-scale production of a universal product according to inflexible organizational principles.' It would be too simplistic, however, to categorize tourism in Cancun and the Yucatan as purely Fordist in nature. Tourism development in Cancun and the surrounding state of Quintana Roo has not

remained static or divorced from the larger global shifts in tourist consumption. The region's industry has evolved to meet changing consumer demand for alternative products to 'sun-and-sand'. Also, following a dramatic development 'boom' in the 1980s, it became evident to FONATUR (National Tourism Promotion Fund – the Mexican government tourism development authority) that Cancun would need to diversify its tourism offerings in order to maintain occupancy rates in the overbuilt resort. Diversification evident within the Cancun resort includes: evolution of the Cancun downtown area into a secondary tourist attraction; a shift from a purely 'ocean-side' focus to development of hotels, restaurants, clubs and malls along the lagoon-side of the island; family attractions such as water and amusement parks; and planned 'megaprojects'

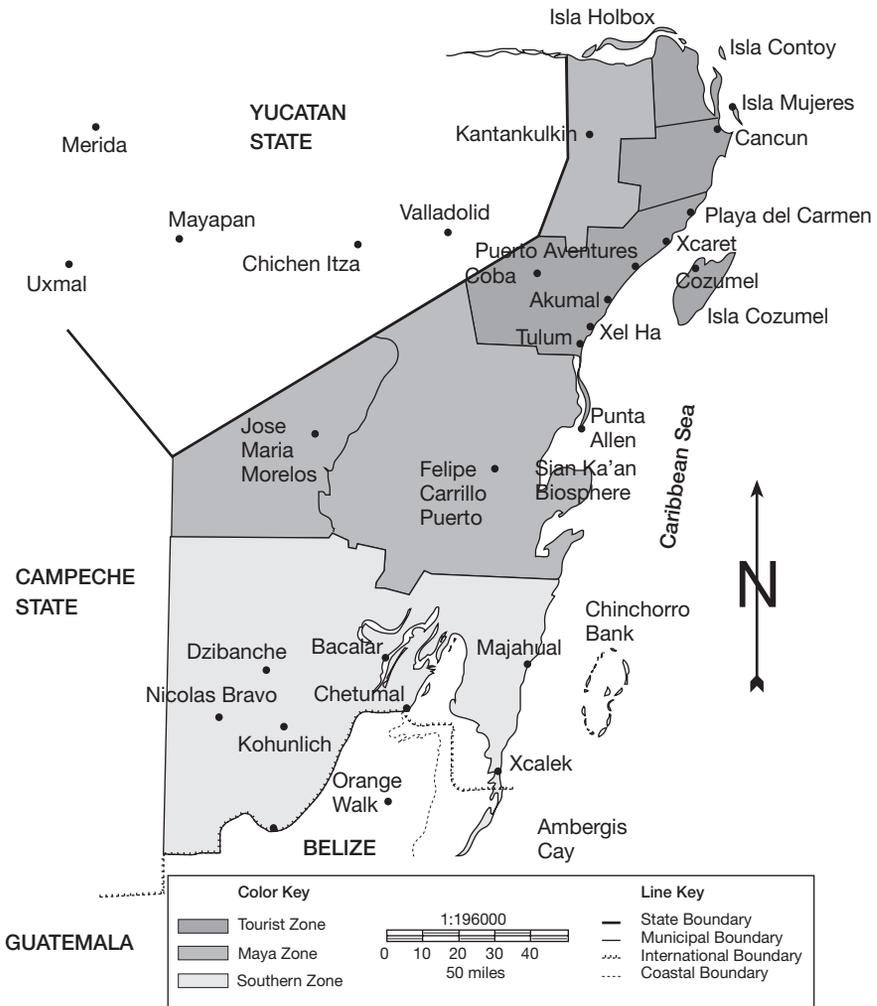


FIGURE 1. Map of Quintana Roo indicating location of relevant sites

including yacht clubs and exclusive shopping and residential complexes. Cancun has been radically transformed from a strictly 'sun-and-sand' tourist bubble into a 'post-industrial urban tourist space' (Torres, 1997), offering a 'kaleidoscope' of activities (Hiernaux-Nicolás, 1999).

Mexican tourism development authorities have recognized that the future of Cancun and tourism in the region depends upon diversifying to meet changing tourist demand away from purely Fordist modes of production and consumption. Paz Paredes (1995: 18), a Quintana Roo SECTUR (Department of Tourism) consultant, warns that 'if we don't have a plan and take advantage of all the natural, historical and social beauty of Quintana Roo, Cancun does not have a future. Why? Because the global trends are turning away from TICs.' Fueled by both government and private sector initiatives, there has been considerable diversification of tourism products outside of Cancun. The most significant developments have occurred south of Cancun, along the central Quintana Roo coast – the 'Riviera Maya'. Together, the 20 destinations considered part of the Riviera Maya offer a variety of tourist landscapes ranging from high-rise, all-inclusive mass tourism resorts to small, rustic 'green' hotels on quiet beaches, and Mayan ruins, among others. Xcaret, an 'eco-archeological' theme park, is an interesting case of a highly successful megaproject located on the Riviera Maya. It offers a form of ecotourism and cultural tourism carefully configured for the mass tourist, bearing conceptual resemblance to an eco-archeological Disneyland. It is the prime example of the commodification of Yucatan Peninsula's nature and culture – packaged for mass tourist consumption.

Improved transportation and communication links with the southern portion of Quintana Roo have provided the opportunity for creating alternative forms of tourism in more remote areas. The most important examples of ecotourism in the region are tours to the Sian Ka'an Biosphere Reserve, offered by non-profit 'Friends of Sian Ka'an'. There are also plans to improve integration of the southern region with Cancun and the Riviera Maya through implementation of low-density ecotourism projects in unique coastal ecosystems such as Xkalak (Campos, 1996). With respect to indigenous tourism, the Mundo Maya (Maya World) project has been the most ambitious and well-articulated effort, although implementation has been slow. This megaproject involves coordination among five Maya nations – Mexico, Guatemala, Belize, Honduras and El Salvador – in the promotion of environmentally sustainable and culturally-oriented tourism (Garrett, 1989). While these projects remain small compared to the mass tourism in Cancun and the Riviera Maya, they and other forms of alternative tourism have been identified by the government of Quintana Roo as holding strong potential for achieving area-wide diversification, expanding the state's appeal in more discriminating global tourism markets, and integrating the southern (Southern Zone; see Figure 1) and interior (Maya Zone; see Figure 1) regions of the state into the tourism economy (Gobierno del Estado de Quintana Roo, 1997).

## Study methodology

The balance of this article draws on data collected during extensive fieldwork in the Yucatan peninsula between 1996–8. The primary objective of the study was to explore linkages between tourism and agriculture sectors in the region (Torres, 2000). Within this context, extensive data were collected in order to enhance understanding of the nature of tourism development in Cancun and the surrounding region. These data permitted the present examination of Cancun's tourism industry from a Fordist spectrum of analysis. Data analysis presented in this article focuses on selected results obtained from two sources – a survey of Yucatan Peninsula tourists and, to a lesser extent, a survey of Cancun hotels. Qualitative interviews with tourists, hotels, government representatives and tourism industry officials and entrepreneurs also inform the analysis.

The Yucatan Peninsula tourist survey concentrated on defining visitor characteristics, as well as determining patterns of tourist consumption. The survey was administered in the Cancun International and Charter Airport departure lounges, one day a month during February, April, May, June and July 1997, allowing capture of seasonal variations between high and low periods. We selected 615 informants using a random sample, stratified by nationality to reflect relatively accurate distribution according to official statistics of tourists to the region (Cancun Hotel Association, 1996). The study sample included 59.5 percent Americans, 1 percent Canadians, 20.7 percent Mexicans, 9.9 percent Europeans, 7.6 percent Latin Americans and 1.3 percent 'others'. The sample is considered to be an accurate reflection of the Yucatan Peninsula visitor population because Cancun, with far more flights than other significant cities such as Merida, is the gateway to the entire peninsula for both mass and alternative tourists. Regardless of their purpose or final destination within the peninsula, most visitors must fly through Cancun airport.<sup>4</sup> Aside from the sheer numbers of flights, the lower cost of plane tickets to Cancun appeal to a broad spectrum of travelers to the region – ranging from mass tourists to penny-pinching adventurous 'backpackers' headed to Chiapas. Flying remains the predominant form of travel to the peninsula by all types of travelers. A small handful of domestic tourists arrive over land, and even fewer arrive by sea on private yachts. Cruise ship passengers, who disembark for partial daytrips, are considered a distinct form of tourism not considered within the scope of this research. As the gateway to the peninsula, the Cancun airport sample of tourists is considered to be highly representative of all types of tourists to the regions, reflecting only a slight bias against lower-end domestic tourists. For further methodological details, see Torres (2000).

The Cancun hotel survey concentrated on defining hotel industry characteristics, food supply and demand, and linkages to local agriculture. Analysis of data in this article will draw only on the hotel industry characteristics component of the survey. The survey instrument was administered to 60 Cancun hotels over

five months, representing a 48 percent sample of all 125 hotels in Cancun. The sample represented approximately 66 percent (14,488 hotel rooms) of all Cancun hotel rooms (22,072 rooms) (Cancun Hotel Association, 1996; Cancun Hotel Survey, 1997).<sup>5</sup> The hotel sample was stratified by class to capture a relatively accurate distribution of Cancun hotels. Because the sample excluded hotels without restaurants, the sample may be considered to have a slight bias against very low-end accommodations.

## The case of Quintana Roo: situating Cancun in the Fordist spectrum of development

The remainder of this article draws on the tourist survey and, to a lesser extent, the hotel survey and official statistics to situate the Cancun tourism industry within the Fordist spectrum. The following analysis emphasizes consumption-oriented variables to conceptualize tourism in Cancun and surrounding Quintana Roo as Fordist in nature, according to the characteristics outlined earlier. This analysis is followed by a discussion of the more recent emergence of post-Fordist and neo-Fordist modes of tourist production and consumption, which both extend and coexist with traditional Fordist structures and elements of the industry in the region.

### Economies of scale in production

As the leading Mexican resort destination, Cancun attracts large numbers of tourists – an indicator of collective consumption or, as Urry (1995) terms it, the ‘collective gaze’. For tourists, the presence of many other visitors defines Cancun as a place for congregation and interaction. Apart from its beach, Cancun is also known for its nightclubs, bars and restaurants – places that encourage the collective gaze and aggregate consumption.

Cancun's heavy reliance on economies of scale is evidenced by the dominance of large-scale ‘luxury’ hotels catering to ‘sun-and-sand’ tourists. With a total of 125 contiguous hotels in 1997, Cancun sets the standard for large-scale tourism and economies of scale. Cancun's hotels are spatially concentrated, with 71 percent (89 hotels) being located on the 14 km island of Cancun, which is now known as the *Zona Hotelera* (Hotel Zone) (Cancun Hotel Association, 1996; Cancun Hotel Survey, 1997). An analysis of hotel rooms reveals even greater spatial concentration, with 90 percent of the rooms (19,936) located in the Hotel Zone. The concentration of accommodation in the Hotel Zone is also a strong indicator of collective, mass consumption. This concentration of tourist space is, in part, a function of FONATUR's original plan, which designed the resort to segregate tourists from the workers who inhabited the service city (Arnaiz and Dachary, 1992; Torres, 1997). Hiernaux-Nicolás (1999: 131) contends that, in this respect: ‘Cancun was the most authentic expression of Taylorist principles of efficiency applied to hotel space: it reflected

an idealistic, quasi-utopian spatial organization, with a total division between labor and leisure, workers and tourists.'

Apart from the sheer number of hotels and the supply of rooms spatially concentrated on the island of Cancun, the large size of the hotels themselves is also characteristic of Fordist mass tourism. Hotels in the Hotel Zone are the archetype of large-scale, high-rise, mass tourism hotels – although with the occasional Mayan accent. According to study results, the average size of hotels in Cancun is 177 rooms. There is also a strong positive correlation between hotel size and hotel class (Pearson correlation coefficient: .698,  $p = .000$ ), with the highest class of hotels (Gran Turismo) having an average of 376 rooms.

Cancun is no longer considered an exclusive, upscale resort; it has become a tourist consumption space for the masses. The distribution of hotels by class, however, would suggest a higher-end resort. Over 50 percent of all Cancun hotels are Gran Turismo or five-star hotels – all located in the Hotel Zone tourist bubble (Cancun Hotel Association, 1996). It is the sheer numbers – the economies of scale and high concentration of so many large hotels – which contribute to the loss of exclusivity, rather than the class or quality of the hotels. Cancun's high-end hotels rival those of the most elite destinations, but, because of their large number and concentration, the price is driven down, allowing access to this typically exclusive 'class' by lower-end tourists. The consequence has been that Cancun is labeled as one of the best bargains in the hemisphere. Luxury hotels, normally out of reach to the middle class, are offered through discount packages in an attempt to maintain occupancy rates in the overbuilt resort. The luxury hotels, impressively arrayed shoulder-to-shoulder along the Hotel Zone beach front, are now the tourist attraction in Cancun – rather than the place itself. The beach and services provided by the luxury hotels are the tourist product. The tourist bubble created by the Hotel Zone concentration and the large-scale, self-contained hotels themselves are 'enclavic tourist spaces' (Edensor, 2001), completely divorced from the physical and cultural reality of their location.

### Collective consumption

The collective consumption that identifies Cancun as a Fordist tourism resort is manifest in the spatial concentration of visitors to the resort. Cancun is, by far, the principal tourist destination in the peninsula. Approximately 90 percent of tourists (553) surveyed while departing the airport had visited Cancun – a resort which clearly dominates the peninsula's tourism landscape (see Table 2). Less than half as many tourists visited the second most popular destination, Isla Mujeres, which is essentially a daytrip extension of Cancun. Not only do most tourists visit Cancun, they tend to stay in one hotel in Cancun. Of all surveyed visitors, 84 percent reported staying in only one accommodation – typically a large-scale, Gran Turismo or five-star beach resort hotel in Cancun. This suggests that visitors tend to remain in one place, limiting their outside visits primarily to nearby daytrips such as Isla Mujeres, Chichen Itza or Tulum (see

TABLE 2. *Visitors to principal Yucatan Peninsula destinations (n = 615)*

<i>Destination</i>	<i>Number visiting destination</i>	<i>Percentage of sample visiting destination</i>
Cancun	553	89.92
Isla Mujeres	202	32.85
Chichen Itza	169	27.48
Tulum	161	26.18
Xcaret	148	24.07
Playa del Carmen	143	23.25
Cozumel	120	19.51
Xel-Ha	103	16.75
Merida	63	10.24
Uxmal	43	6.99
Valladolid	32	5.20
Coba	30	4.88
Akumal	24	3.90
Chiapas	23	3.74
Guatemala	19	3.09
Belize	18	2.93
Puerto Aventuras	15	2.44
Sian Ka'an	5	0.81
Punta Allen	3	0.49

Table 2). If people were striking out and exploring the Yucatan Peninsula, they would most likely stay in more than one accommodation and spend more nights outside Cancun. Supporting this notion, 80 percent of all visitors surveyed spent the majority of their time in Cancun. The average number of nights stayed (6.43) also suggests a more short-haul, resort tourism, as opposed to a longer stay permitting exploration outside Cancun. The collective consumption or collective gaze (Urry, 1995) associated with this high degree of spatial concentration and economies of scale is a strong indicator of the Fordist tourism paradigm.

### Undifferentiated consumers

Recent tourism literature suggests that the Fordist tourism market targets highly undifferentiated clientele (Vanhove, 1997) – often middle-class mass tourists. It would be a gross overgeneralization to state that the Cancun tourism market is undifferentiated. As suggested earlier, it would appear that the market is becoming increasingly segmented to include more post-Fordist tourists interested in ecology, culture, history and adventure, among other specific pursuits. There is, nevertheless, a clearly identifiable core market with well-defined characteristics.

With respect to nationality, American tourists predominate, representing nearly 60 percent (366) of visitors surveyed. This mirrors the official Cancun

Hotel Association (1996) statistic (60 percent) for nationality breakdown of all visitors to Cancun. The large number of American tourists contribute to the strong US influence in Cancun. All aspects of life have an American flavor, including consumption patterns, dress, media, businesses, architecture/design and personal amenities, among others.

There is also a clear domination of the Cancun market by visitors on 'family vacations'. Of survey respondents, 45 percent (274) indicated that the principal purpose of their visit was a 'family vacation'. With the average annual income for international tourists being US\$69,260 (401 respondents) and US\$39,291 for domestic tourists (116 respondents), Cancun clearly offers an affordable option for middle-class family vacationers. Cancun's appeal to lower-end tourists is also reflected in the fact that it has the lowest international visitor per capita expenditures of all of Mexico's five TIC (Cancun: US\$111; Loreto: US\$162; Ixtapa: US\$187; Los Cabos: US\$277; Huatulco: US\$408) (FONATUR, 1998).

### 'Sun-and-sand' mass tourism

'Sun-and-sand' tourism is one of the oldest and most prolific forms of Fordist mass tourism. Despite recent diversification, 'sun-and-sand' tourism continues to dominate Cancun's tourism industry market. As indicated earlier, the concentration of tourists in Cancun – in addition to the propensity for tourists to stay in only one hotel – is largely a function of 'sun-and-sand' tourism, in which the hotel resort itself and its immediate beach environment are the primary attractions. This thesis is also supported by the overwhelming predominance of Gran Turismo and five-star hotels in Cancun – facilities that provide direct access to the beach and luxurious 24-hour pampering to their guests.

According to the tourist survey, the single most important factor drawing visitors to the Yucatan Peninsula are its beaches. Using a five-point Likert scale ranging from '1 = No Importance' to '5 = Extremely Important', 87 percent of all tourist respondents indicated that beaches were 'Quite Important' (4) or 'Extremely Important' (5) in their decision to visit the peninsula (see Table 3).

TABLE 3. *Tourist rating of importance of different factors in decision to visit the Yucatan Peninsula (n = 615)*

<i>Level of importance 1–5</i>	<i>Total (number)</i>	<i>None (1) (%)</i>	<i>Little (2) (%)</i>	<i>Somewhat (3) (%)</i>	<i>Quite (4) (%)</i>	<i>Extremely (5) (%)</i>
<i>Decision-making factors</i>						
<i>Beaches</i>	592	2.0	2.9	7.9	29.7	57.4
<i>Climate</i>	589	2.9	3.6	13.6	34.3	45.7
<i>Environment</i>	571	4.6	9.8	22.6	34.7	28.4
<i>Mayan culture</i>	583	7.4	13.9	23.7	28.5	26.6
<i>Archeological sites</i>	589	8.8	14.5	24.9	26.3	25.6

Relative to other factors (based on the Likert scale average), beaches were rated the most important factor with a mean of 4.38 (see Figure 2). Following beaches, climate was the second most important variable (mean = 4.16) influencing respondents' decision to travel to the Yucatan region (see Figure 2). Eighty percent responded that climate was 'Quite Important' or 'Extremely Important' in their decision to visit the Yucatan Peninsula (see Table 3). Not surprisingly, environment followed climate in importance (mean = 3.73) (see Figure 2), with 63 percent of respondents indicating that environment was 'Quite Important' or 'Extremely Important' as a factor motivating their visit to the Yucatan (see Table 3). The data suggest that, when referring to 'environment', the respondents associated the term with the beaches, coastal areas and reefs, rather than forests and nature reserves. This interpretation was supported by the low incidence of travel to environmental destinations (see figure 3). The importance of these three factors (beaches, climate and environment) to tourists supports the conclusion that 'sun-and-sand' remain the very heart of the Yucatan Peninsula tourism industry.

The principal mass – and more alternative tourism destinations – were grouped into five categories: 'sun-and-sand', *Mundo Maya*, *historical*, *environmental*

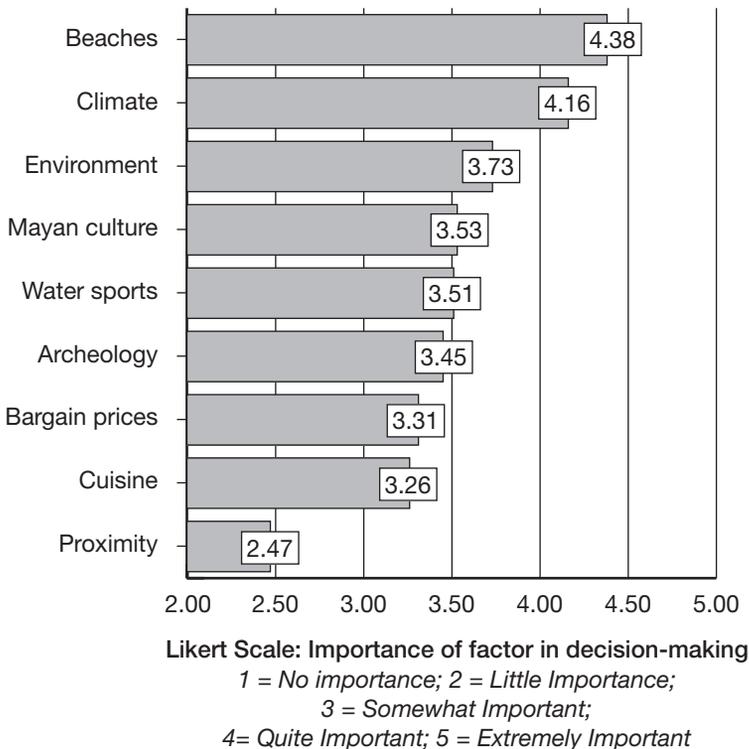


FIGURE 2. Decision-making factors in visiting the Yucatan (n = 615)

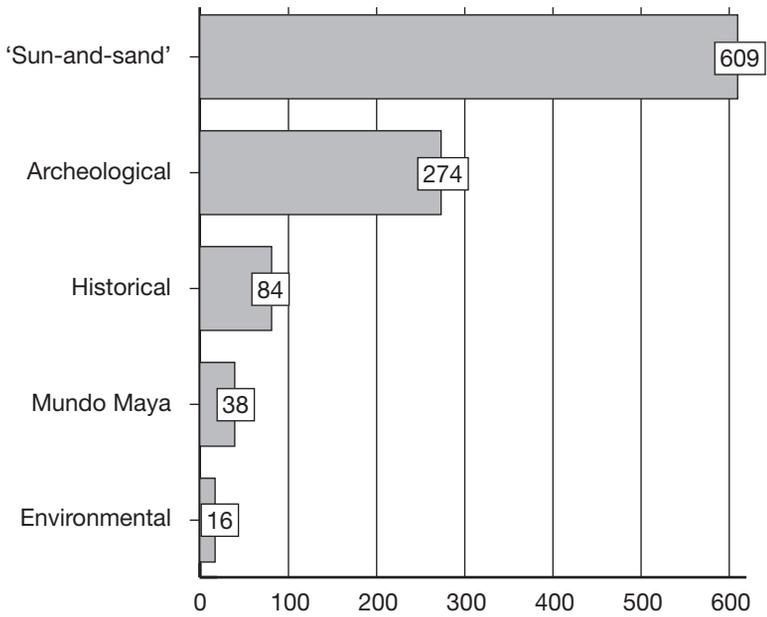


FIGURE 3. Number of tourists visiting different types of destinations (n = 615)

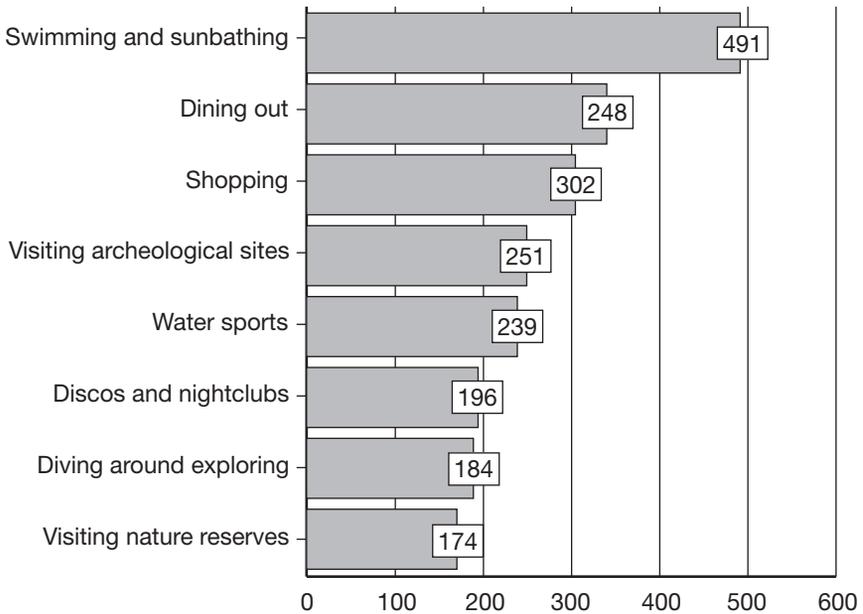


FIGURE 4. Activities ranked in top three (most time spent) by tourists (n = 615)

and *archeological* (for details on the categorization of destinations, see Torres, 2000). An analysis of the number of tourists visiting different types of destinations also confirms that Quintana Roo remains a region characterized predominately by 'sun-and-sand' Fordist tourism. Of all tourists surveyed, 99 percent (609) visited a 'sun-and-sand' destination (see Figure 3). Following 'sun-and-sand', archeological sites were those most frequented, with 45 percent (274) of all respondents visiting these destinations (see Figure 3). These sites range from mass tourism archeological destinations, such as Chichen Itza, to alternative tourism to less frequented ruins, such as Coba. Despite the numerous ruins close to Cancun and other principal resort cities, over half the respondents failed to visit any of the many archeological sites. None of the respondents visited Kohunlich and Dzibanche, large sites located in southern Quintana Roo (see Figure 1 and Table 2), which opened recently following many years of restorative work. The number of visitors to historical Mundo Maya, and environmental destinations in general, was negligible (see Figure 3).

An analysis of how tourists spend time also supports the contention that the region's tourism industry is predominately based on 'sun-and-sand'. When visitors were asked to rank, in order, the activities they spent the most time doing while on vacation, 'swimming and sunbathing' was overwhelmingly listed first (see Figure 4). Swimming and sunbathing was ranked first by 52 percent (320) of the tourist survey respondents, and it was among the top three activities for 80 percent (491) of respondents. The next most highly ranked activities were 'dining out' and 'shopping' – also activities associated more with mass tourism (see Figure 4). Notably, activities suggesting more flexible, individualized, post-Fordist tourism, such as 'driving around exploring' and 'visiting nature reserves', were ranked last. Visiting archeological sites, which is logically associated with alternative tourism, was ranked fourth (in the top three by 41 percent [251] of the respondents), and would appear to be an interesting exception (see Figure 4). It is important to note, however, that in Yucatan, archeological sites such as Chichen Itza, Tulum and Uxmal have been standardized and equipped with modern amenities, such as snack bars, gift shops, tour guides and English-language information, to process large numbers of 'daytripper' tourists. These sites offer several of the 'sign posts' and markers described by Urry (1990b) to construct the collective mass tourist gaze. Typically, tourists arrive in large, air-conditioned tour buses and view the ruins with guides who assist in the construction and collection of signs and attempt to create an air of authenticity. The majority of visitors to archeological sites purchase organized daytrip tours to visit the ruins. In the case of Yucatan, ancient Mayan civilization has been processed, packaged and standardized for mass consumption by tourists. Chichen Itza was, in fact, the third most frequently visited tourist destination in the peninsula, with over one quarter of all tourists (27 percent and 169 visitors) visiting the site (see Table 2). Nearly 65 percent of all visitors to Chichen Itza went on an organized tour. Lesser known, 'off the beaten path' Quintana

Roo archeological sites, such as Kohunlich, Dzibanche and Coba, were rarely visited.

Despite the market diversification of recent years, 'sun-and-sand' remains at the core of the tourism industry in Cancun and the Riviera Maya, which suggests that there has not been a clear break with the Fordist development paradigm. It is also important to recognize that, while all 'sun-and-sand' tourism is not necessarily Fordist in nature, the label does closely fit the large-scale, undifferentiated product offered for mass consumption at Cancun's beach resorts.

### Standardization

Standardization and rigidity of the tourism product are strong indicators of Fordist tourism. Much of the tourism industry in Quintana Roo, particularly in Cancun, is highly standardized. The high incidence of packaged tourism and dominance of transnational franchise chains are both strong indicators of standardization.

Analysis of the Cancun hotel industry structure reveals a high degree of standardization attributable to franchise chains. Of all hotels surveyed, 50 percent (30) belong to franchise chains which, in the interests of efficiency, impose rigid standards while also maintaining tight quality controls. Franchise chains, most of which also rely heavily on scale economies to achieve profitability, tend to favor large hotels. In Cancun, this is confirmed by a strong positive correlation (Pearsons correlation coefficient: .641,  $p = .000$  at an .01 level) between franchise and hotel size. According to an analysis of survey data, the distribution of hotel rooms by franchise vs non-franchise also reveals that the vast majority of rooms (71 percent [10,252 rooms]) in Cancun are offered by franchised hotels.

Fordist rigidity and standardization are also manifest in the proliferation of package tours to the region. Cancun confirms Ritzer and Liska's (1997) contention that the package tour remains strong, despite the belief by many scholars of a shift to post-Fordism on a global scale (Harvey, 1990; Ritzer and Liska, 1997; Urry, 1990b). Of study respondents, 53 percent (324) were package tour visitors. Tours can include any combination of airfare, accommodation, airport transport, local transport, breakfast, other meals, local tours or other expenses. Typically, package tours are discounted, often targeting lower-end tourists. The average per person cost of a package was US\$874.62, with an average stay of 6.4 nights.

In recent years, there has been a growing trend towards all-inclusive resorts or standard hotels offering all-inclusive options. This trend could arguably be considered Fordist in that it is characterized by a highly standardized, rigid mode of production, reinforcing large-scale collective consumption by consumers having little control or decision-making authority. According to visitor survey data, 24 percent (143) of all visitors to Cancun were on an all-inclusive package. Of all packages (324 package visitors), 45 percent were

all-inclusive. The study revealed that 47 percent (28) of all hotels surveyed offered an all-inclusive option or were a completely all-inclusive resort. The all-inclusive mode of operation in Cancun is geared towards collective, large-scale and undifferentiated consumption by discount tourists.

Another trend in Cancun that can be interpreted as a form of Fordist production is the growing number of time-share resorts. Time-share resorts sell visitors a 'week' of time in the resort on a yearly basis. This mechanism allows hotel owners rapid recovery of capital investments and stimulates a high level of repeat visitors. Tourists consume, on a regular basis, a highly standardized product, of which they know exactly what to expect when they return each year – all 'unknown' and new discovery elements are eliminated. Typically, time-share is offered through large-scale, Gran Turismo or five-star resorts attracting 'sun-and-sand' mass tourists. Of all hotels surveyed, 22 percent (13) offered a time-share option.

### **The emergence of post-Fordist and neo-Fordist tourism in the Yucatan Peninsula**

While Cancun – the dominant Yucatan Peninsula tourism destination – is without question a mass tourism resort, demonstrating key characteristics of Fordist production and consumption, there are nevertheless strong indicators that new, more post-Fordist forms of tourism in the region are emerging. Also, mass tourism itself has become more flexible and diversified, perhaps indicators of incipient neo-Fordism or mass customization. The reality, upon closer examination, is that mass tourism is far more complex than a cursory examination would suggest; a rich blend of shadings that coexist quite amicably in resorts such as Cancun. Cancun appears to have evolved from its inception as a predominantly Fordist 'enclavic tourist space' into a diversified 'heterogenous tourist space' which, as defined by Edensor (2001: 64), has 'blurred boundaries, and is a multi-purpose space in which a wide range of activities and people co-exist'. This 'heterogenous tourist space', constructed through the continual reproduction of diverse types of tourism and space (Edensor, 2001), as well as the proliferation of niche markets, is part of the emergence of post-Fordist and neo-Fordist modes of tourism production and consumption. The following section briefly reviews current trends in Cancun and the surrounding region that are suggestive of post-Fordist or neo-Fordist tourism, and concludes with examination of the potential for further developing these segments within the Yucatan Peninsula tourism industry.

Drawing on tourist survey data, a new variable was created to serve as a gross measure of types of tourist. Informants were identified as either 'mass' or 'alternative', depending on the destinations they frequented during their trips. Destinations were determined to be 'mass' or 'alternative' according to, among other factors, the frequency of visitors and the nature of tourism development at the destination. For the purposes of this analysis, 'mass tourism' destinations

were characterized by large numbers of tourists participating in primarily 'sun-and-sand' or highly organized 'eco' or archeological activities. Alternative sites were destinations visited infrequently, and then only by tourists seeking archeological, historical and ecotourism experiences within a less structured context. Alternative sites are considered to be more highly associated with post-Fordist modes of tourism production and consumption, while mass sites are more Fordist in nature. If respondents had gone to even one alternative site, they were categorized as 'alternative'. Despite this rather liberal categorization, only 23 percent of visitors qualified as alternative (Torres, in press). This provides strong confirmation that Yucatan Peninsula tourism is dominated by 'mass tourists' who tend to remain in the tourist bubble, rarely venturing off the beaten path to explore the region. The 23 percent of tourists who chose to visit alternative destinations nevertheless provided evidence of emerging, new and more specialized post-Fordist tourism production and consumption. Even more accurate, perhaps, would be an interpretation of neo-Fordism, with the predominately mass tourism paradigm evolving to provide greater access to offbeat destinations, increased consumer choice and specialization. The growth of specialty niche market tourism also reflects government-funded improvements in infrastructure that have rendered alternative sites more accessible to tourists. Despite strong state interest in promoting alternative tourism, many of these 'off the beaten path' tourism assets remain underexploited. Clearly, there is significant potential for diversification of tourism industry development in Cancun and the surrounding Yucatan Peninsula.

Tourists visiting 'off the beaten path' or alternative destinations tend to do so privately, rather than take formal tours. This is in part a function of the lack of tours to most alternative destinations. It also reflects the propensity of this type of visitor to reject the standardization and rigid structure of an organized tour. Study data suggest, however, that the typical Cancun package tour conforms to the more flexible variety, as described by Ritzer and Liska (1997). The typical package tour to the region included flights (96 percent of all packages), hotel accommodations (96 percent) and airport transport (82 percent). Slightly more than half of all package tours included breakfast (54 percent), while 45 percent included other meals. Only 15 percent of the packages included local tours. This suggests that most packages are not tour groups per se, but rather individual discounted packages covering primarily accommodations and airfare (and in some cases food). This type of package offers greater flexibility, as tourists themselves control their time while in Cancun – unlike the classic group tour in which activities and schedules are rigidly adhered to and visitors have little discretionary time or choice of destination. It should also be noted that Cancun's sheer size, and the large number of packages available to it, provide consumers with a wide range of destinations, activities and tour 'themes' from which to choose. The typical Cancun package tour would appear to offer flexibility and consumer choice more closely resembling neo-Fordism (Ioannides and Debbage, 1998) or 'mass customization' (Ritzer and Liska, 1997) than Fordism.

In addition to the wide range of available package tours to Cancun and the surrounding region as a destination, there is a considerable variety of choice of local, short-term and daytrip tour offerings. This also supports the notion of neo-Fordism or mass customization. Interestingly, several archeological- or 'nature'-oriented, non-'sun-and-sand' destinations are heavily frequented by organized tours. For example, 65 percent (109) of all visitors to Chichen Itza went on an organized tour. Other notable examples are Xcaret, the eco-archeological theme park (with 63 percent on tours), and Xel-Ha, a snorkeling lagoon (53 percent on tours) – both located in the Cancun–Tulum corridor. These are examples of the standardization, packaging and commodification of the local culture and environment for mass consumers who are demanding increasingly diversified and specialized destinations. In Cancun, visitors are offered literally hundreds of combinations of these short daytrip options to a variety of destinations in Quintana Roo or Yucatan. These may be purchased upon their arrival and at their own discretion. While most of these short tours fit the highly structured and rigid tour archetype – where large numbers of visitors are bussed and processed by guides – tourists retain significant control over scheduling and selection of destinations. It is typical for visitors to purchase a standard package that includes only a flight, a Cancun hotel and airport transport, and then tailor their vacation by adding short daytrip tours once they arrive. In this sense, while they are clearly mass tourists, they are also able to customize their vacations.

Apart from the wide array of locally available tours, Cancun visitors now have increasing local choice and flexibility with respect to activities and tourism consumption within the resort itself. Tourists have available to them a wide range of options including: dining out, shopping, archeological sites, water sports, golf, horseriding, motor sports, movies, discos and nightclubs, among others – all within Cancun.

Another indicator of a shift to a more diversified post-Fordist or neo-Fordist tourism landscape is the growth of archeology-based tourism in the region. Fifty-two percent of respondents indicated that archeological sites were 'Extremely' or 'Quite Important' in their decision to visit the Yucatan peninsula (see Table 3). Relative to other factors, archeology was ranked sixth out of nine factors (mean = 3.45) in importance (see Figure 2). It is notable that 'Mayan culture' was rated fourth as an important factor in tourists' decisions to visit the region (mean = 3.53) (see Figure 2). A total of 55 percent stated that Mayan culture was 'Extremely Important' or 'Quite Important' in their decision to travel to Yucatan (see Table 3). In-depth interviews suggested that respondents associated 'Mayan culture' with ancient Mayan civilization, as locally manifest in archeological sites, rather than with the 'living Maya'. Forty-five percent (274) stated that they had visited an archeological destination (see Figure 3) – typically the most frequented mass sites at Chichen Itza, Tulum and Uxmal (see Table 2). With respect to time spent on activities, 41 percent rated visiting archeological sites in their top three activities (see Figure 4). Table 2 shows that

Chichen Itza was the third most popular of 19 destinations, with over a quarter of all tourists visiting the site (169). Of all tourists, 26 percent visited Tulum, which was ranked the fourth most popular destination (see Table 2). While the most frequented archeological ruins are those that have been standardized and packaged for mass consumption, the interest in visiting these sites represents a notable shift from the exclusively 'sun-and-sand' tourism of Cancun's early days, suggesting emerging post-Fordist and neo-Fordist elements. Visitors to these mass tourism archeological sites may conform to Feifer's (1986) or Urry's (1990a) 'post-tourist' or Hawkins's (2001) 'mainstream post-tourist', who desire both authenticity and 'reality', while consuming highly commodified and sanitized tourist places. The growing demand for Mayan civilization and culture among the region's tourists has paved the way for excavation and development of new archeological sites such as Kohunlich and Dzibanche in Quintana Roo, and Mayapan in Yucatan. This is indicative of strong potential for developing more post-Fordist or neo-Fordist forms of tourism linked to the peninsula's innumerable archeological sites.

To a lesser extent, a new form of ecotourism – albeit a mass consumption variety – has emerged in the peninsula. Epitomizing this is Xcaret, which has commoditized and packaged the peninsula's environment for middle-class, family-oriented tourists. Xcaret is, in most respects, a classic example of Ritzer's McDisneyfication mass tourist product, but it takes Ritzer's concept one step further by appealing specifically to a new breed of 'environmentally conscious' mass consumers with specialized tastes. Table 2 shows that Xcaret captures approximately 24 percent of all visitors to Cancun – amazing market penetration given Xcaret's location over an hour south of Cancun. Another phenomenon indicative of the growing demand for environmental and local ecology tourism is the proliferation of local 'jungle tours'. Tourists are led on mass jet ski tours through the mangroves lining Cancun's lagoons, to experience the local 'jungle'. One company – which houses live tigers, jaguars and leopards caged atop a restaurant facing the heavily congested hotel strip – leads tourists on jet skis through the nearby swamps, with a live tiger perched at the end of the lead boat. It is unclear whether consumers of these 'jungle tours' are in a desperate search for the authenticity (MacCannell, 1976) of Yucatan's environment, or whether they represent Urry's post-Tourist who revels in the lack of authenticity as a form of kitsch (Urry, 1990a) – but a live Indian tiger atop a boat in a Cancun lagoon would probably suggest the latter. Regardless of whether it is the search for authenticity or kitsch, this mass consumption of the environment – albeit simulacrae – does represent a movement beyond the traditional, Fordist 'sun-and-sand' activity for Cancun visitors, most accurately captured by the notion of more specialized and diversified neo-Fordism.

Study results suggest that environmental or ecotourism attractions remain underdeveloped in the Yucatan Peninsula, despite the numerous ecological assets available in the area, including: tropical forests, caves, *cenotes*, remote freshwater lakes, nature reserves, untouched coastal areas, reefs and a large variety of flora

and fauna. The number of respondents reporting having visited environmental or ecotourism destinations (not including Xcaret) was negligible at only 3 percent (16 respondents; see Figure 3). Of 615 respondents, only five visited the World Heritage nature reserve, Sian Ka'an (see Table 2). Visiting nature reserves was ranked last of eight activities (see Figure 4) upon which tourists spent time. This low level of participation in ecotourism most likely results from a combination of factors, including: lack of development of an ecotourism industry; poor infrastructure in remote areas; and the type of tourism the region attracts. It is noteworthy, however, that 'environment' was ranked third in the importance of decision-making factors in visiting the Yucatan (mean = 3.73) (see Figure 2), with 63 percent of visitors indicating it to be either 'Extremely Important' or 'Quite Important' in their decision to visit (see Table 3). This would suggest a strong potential for further developing ecotourism or nature tourism in the region, particularly if packaged to ensure safety and comfort to mass tourists.

Another area holding potential for more post-Fordist or neo-Fordist tourism is 'Mayan culture'. Currently, there is almost no meaningful context for tourists to experience authentic Mayan culture. Mayan culture has been heavily marketed to tourists through images of Mayan people, particularly women in typical Yucatecan *Huipile* embroidered dresses, and pseudo-Mayan pyramids and architecture incorporated into hotel, restaurants and monument design. Mayan hieroglyphics and images of ancient Maya Indians are displayed and sold on everything from coffee mugs to T-shirts. The mass consumption of these artificial reproductions of Mayan cultural 'signs' and images may represent a desire on the part of tourists to experience the exotic and primitive 'other' embodied in Mayan culture. In interviews with tourists, many expressed frustration over their inability to experience authentic Mayan culture or have meaningful contact with Mayan people. For most visitors, their closest encounter with the Maya was the image of villages flashing by outside the window of their air-conditioned bus on the way to Chichen Itza. Yet, 'Mayan culture' was ranked fourth by tourists in the importance of factors influencing their decision to come to Cancun (mean = 3.53) (see Figure 2). Of respondents, 55 percent indicated that Mayan culture was 'Extremely' or 'Quite Important' in their decision to visit the Yucatan (see Table 3). The Mundo Maya route is an attempt to cultivate this growing demand to consume Mayan culture. Despite the international 'Mundo Maya' campaign and the rich history and cultural heritage of the region, only a small handful of respondents appeared to be following a Mundo Maya route (6 percent [38]; see Figure 3). In addition, there is no evidence to suggest the availability of rural or ethnic tourism products that might enable tourists to visit rural Mayan villages and/or put them into direct contact with local Mayan Indians. Relatively small numbers of tourists visited historical cities and attractions. Only 14 percent (84) of all visitors surveyed spent time at a historical site (see Figure 3). The most common historical destinations were Merida (63 visitors) and Valladolid (32 visitors) (see Table 2), both known more for their Spanish colonial heritage than local Mayan culture.

Cancun tourists demonstrate a high degree of potential demand for an alternative form of rural or ethnic Mayan village tourism. Seventy-six percent (469) indicated that they would be interested in taking a daytrip tour to a Mayan village where they could experience 'authentic' food, learn about local ecology and farming systems, and procure local arts, artefacts and preserved foods in an indigenous tourism context. This suggests significant potential for promoting ethnic and indigenous tourism projects in the region. Less clear, however, is whether this type of tourism could attract the high-end tourists necessary to generate adequate income, while also keeping numbers low enough to mitigate negative ecological and cultural impacts. Among tourists expressing an interest in ethnic tourism, 37 percent were willing to pay only US\$50 or less per day for such a tour. Another 34 percent expressed themselves willing to pay between US\$51–75 for the daytrip, including transportation, access and meals. Less than 30 percent indicated a willingness to pay over US\$75. In order to attract high-end tourists, these data suggest that it might be necessary to tap into markets outside the discount mass tourist market now prevalent in Cancun.

While alternative, more post-Fordist forms of tourism hold significant potential for the region, the reality remains that Cancun and the Yucatan Peninsula are dominated by mass tourism, and will most likely remain so in the future. The growing demand for specialization, customization and flexibility within mass tourism markets, embodied in the notion of neo-Fordism, represents the greatest potential for developing alternative forms of tourism such as ecotourism, archeological tourism and ethnic tourism. Of all tourist survey respondents, 92 percent expressed a desire to return to the region in the future. Most respondents indicated, however, that they would return to Cancun or other mass tourist destinations such as Cozumel, Playa del Carmen and Isla Mujeres. Of all 615 tourists surveyed, 44 percent (273) indicated that they would return to Cancun as their principal destination. This suggests that people visiting Cancun either lack exposure to the diverse Yucatan Peninsula destination offerings, or have little interest in returning to visit such alternative destinations. If post-Fordist tourism in the region is to grow in the future, it will require a great deal of promotion and marketing – primarily targeted at markets beyond the mass tourists currently being attracted to Cancun. That said, expanding the destinations and activities available to visitors already frequenting traditional, Fordist mass tourism poles such as Cancun – catering to their growing, neo-Fordist predilections – probably holds the greatest potential for future development in the region.

## Conclusion

While the simple Fordist/post-Fordist dichotomy fails to capture the subtle complexities of the changing nature of global tourism production and consumption, an expanded Fordist spectrum of analysis does provide a useful theoretical framework. The application of the Fordist spectrum of analysis to

empirical data presented in this article firmly situates Cancun as a predominantly Fordist mass tourism resort. Analysis reveals, nevertheless, that within this predominant mass tourism paradigm, there is a growing diversity and flexibility. There are also strong indicators of emerging modes of post-Fordist and – even more markedly – neo-Fordist production and consumption. Study results illustrate that tourism development in Cancun and the surrounding Yucatan Peninsula is not static or trapped on a predetermined evolutionary path of mass tourism. It is a dynamic industry responsive to global shifts in tourism – particularly the increasingly diversified and specialized tastes of even the most mundane ‘mass’ tourist. According to study data, this increasing tourism diversification provides an excellent opportunity to expand nature-oriented and ethnic tourism in the area. The tourism landscape of Cancun is a complex combination of both Fordist and post-Fordist forms of tourism, which exist in parallel, along with more flexible, customized forms of mass tourism which reflect processes of neo-Fordism or ‘mass customization’. The reality of Fordist tourism production and consumption is one of various shades of mass tourism that coexist to comprise a complex, continually changing tourism landscape.

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#### NOTES

1. John Urry (1990b) developed the widely cited notion of the ‘tourist gaze’. The tourist gaze involves consumption of landscapes or townscapes, which are gazed upon individually or collectively. Tourists collect, in an abstract sense, signs and objects that construct the gaze and convey meaning.
2. The term ‘Fordist spectrum’ is used in this article to refer to the continuum of development, which is conceptualized around the notion of Fordism including: pre-Fordism, Fordism, post-Fordism and neo-Fordism. In an attempt to move away from dichotomous shifts, the notion of a spectrum recognizes that all variants can coexist over time and space.
3. In his seminal work *The Condition of Postmodernity* (1990: 9), David Harvey posits postmodernism as the antithesis of modernity, and describes it in the following manner: ‘Fragmentation, indeterminacy, and intense distrust of all universal or “totalising” discourses (to use the favored phrase) are the hallmark of postmodernist thought.’
4. The following SECTUR data (1997) illustrate the importance of Cancun as a gateway to the peninsula for international travelers. In 1997, Cancun received 33,658 flights, of which 67 percent were international or charter (which tend to be mostly international). Merida, in contrast, received 8140 flights, of which only 19 percent were international or charter. Cozumel received 5891 flights, with 26

percent being international or charter. Flights to the remaining Yucatan Peninsula airports, Chetumal and Campeche, were minimal (663 and 374 respectively), with 12 percent international flights to Chetumal and none to Campeche.

5. Data concerning number of hotel rooms for 1997 supplied by the Cancun Hotel Association did not, in some instances, match data in hotel interviews. In such cases, interview data were used as the information was considered to be more accurate. For this reason, FONATUR official statistics are slightly different for 1997 with a total of 124 hotels and 20,381 rooms (FONATUR, 1997).

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