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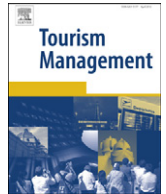
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# Tourism Management

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## The evolution of mass tourism destinations: New approaches beyond deterministic models in Benidorm (Spain)

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### HIGHLIGHTS

- We analyse external and internal dynamics in the evolution of a tourist destination.
- We make a cross-analysis between global factors and local responses.
- The dynamism of mature tourist destinations has an undeniable complexity.
- Destinations can influence their own future evolution.
- Long term competitiveness depends on the local adaptation capacity to changes.

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### ABSTRACT

Although deterministic models of the evolution of mass tourism coastal resorts predict an almost inevitable decline over time, theoretical frameworks of the evolution and restructuring policies of mature destinations should be revised to reflect the complex and dynamic way in which these destinations evolve and interact with the tourism market and global socio-economic environment. The present study examines Benidorm because its urban and tourism model and large-scale tourism supply and demand make it one of the most unique destinations on the Mediterranean coast. The investigation reveals the need to adopt theories and models that are not purely deterministic. The dialectic interplay between external factors and the internal factors inherent in this destination simultaneously reveals a complex and diverse stage of maturity and the ability of destinations to create their own future.

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### 1. Introduction

This paper assesses theories of the life cycle and restructuring of tourist destinations in light of the recent evolution of Benidorm, a paradigmatic coastal destination on the Mediterranean (see Fig. 1), and analyses different phases of its evolution, which reflect the global factors and local processes that affect tourism. The investigation revealed that the deterministic nature of Butler's Tourism Area Life Cycle model (Cooper, 2006) and Miossec's model (1977a, 1977b) did not apply to the evolution of Benidorm, which has adapted to different market circumstances and possesses features that ensure its competitiveness in the contemporary

tourism scene. Therefore, this study presented a new approach to the evolutionary analysis of coastal resorts that complements traditional theoretical models.

Benidorm is a typical example of the resorts that emerged along the Mediterranean coast in the 1960s during the mass tourism boom that catered primarily to foreign tourists through large international tour operators that controlled the market. However, its unique urban development model is crucial for understanding the dynamics of this holiday resort. Originally a small fishing village, Benidorm is the result of a local planning model based on a public initiative that was initially approved in 1956 and partially modified in 1963. Within this framework, the authorities planned the categories of land use and buildings and defined growth areas, in particular an area of urban expansion adjacent to the Levante beach which led to Benidorm's distinctive image of high-density urban development and high-rise buildings.

Benidorm is one of the most important tourist destinations on the Mediterranean coast. The 2010 census identified 74,000 registered inhabitants, 37% of whom are foreigners. In regulated

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Fig. 1. Location of Benidorm on the Mediterranean coast.

accommodations (hotels, apartments and campsites), Benidorm provides more than 68,000 beds and there are 18,000 second homes. Hotels alone annually register approximately 10 million overnight stays, with foreign (primarily British) tourists accounting for half of these visits. Throughout its development as a tourist destination, this holiday resort has had a high average length of stay for tourists and high hotel occupancy rates throughout the year due to limited seasonality. However, new trends in the tourism market have raised doubts about the future of this destination.

The first section of this paper provides a detailed analysis of the recent evolution of this destination, the specific local impact of external global factors and the internal factors related to the dynamics of territorial and tourism features that are unique to this destination. The goal of the analysis was to determine the extent to which the recent evolution of this destination was influenced by the interaction of external forces or global factors with local measures designed to renovate the destination and maintain its competitiveness. The second section focuses on the opinions of local *stakeholders* who have influenced the evolution of the destination and whose actions will largely determine Benidorm's future.

The analysis of mature destinations is of interest from academic, political and tourism management perspectives. Academic approaches focus on the relationship of mature destinations with sustainable development and market diversification (Bramwell, 2004), the development of long-tail strategies (Lew, 2008), and the role of mature destinations within a global scenario affected by structural changes in the tourism market (Duhamel & Violier, 2009; Shaw & Coles, 2007). From the political and institutional point of view, the Spanish Ministry of Tourism is currently developing the *Coastal Tourism Plan for the 21st century* in collaboration with regional governments, which will revise tourism strategies to produce higher levels of sustainability, innovation and differentiation. The goal is to change the prevailing economic and tourism model for the Mediterranean coast and the Canary and Balearic Islands from the current model, which is based on the residential construction that has been brought to a standstill due to the economic crisis. The plan provides a national initiative to increase the value of mature tourist destinations and is consistent with public measures to promote the renovation of mature destinations that began in the 1990s.

Analysing the recent evolution of Benidorm is particularly relevant in light of both structural changes in the tourism market and the current economic crisis. In contrast to tourism models based on urban sprawl, which have resulted in dispersed settlements in coastal areas (European Environment Agency, 2006), Benidorm offers an urban density model that is more environmentally efficient in regard to energy, water and land use, is less dependent on private transport and is more attractive to tourists year-round (Iribas, 2000). As a result, it is widely acknowledged as a future model for coastal destinations that seek to be holiday hubs (MVRDV, 2000; Thomson Holidays, 2010).

To determine the extent to which contemporary mature destinations can evolve into future holiday hubs, it is critical to examine how destinations like Benidorm have addressed issues such as the negative image of a mass tourism destination; dependence on the British and Spanish market segments; re-intermediation processes in tourism distribution and changes in tour operator processes such as online travel agents, internet distribution systems, and *dynamic packaging*; changes in consumer preferences and behaviour patterns due to generational changes, the increasing diversity of travel motivations and reductions in the average length of stay; and limited business profit margins. These new realities suggest a new approach to consolidated destinations that does not support the prevailing theoretical claim of inevitable decline.

## 2. Theoretical framework

Although there were notable precedents (Christaller, 1963; Gilbert, 1939), the analysis of the evolution of tourist destinations emerged as a research interest with the rise of international tourism as a mass phenomenon. During the 1970s, several critical studies (Miossec, 1977a, 1977b; Plog, 1973; Thurot, 1973; Turner & Ash, 1975a, 1975b) identified mass tourism as the final stage in the evolution of destinations, a stage that would ultimately lead destinations to lose their original attractiveness.

Butler's (1980) Tourism Area Life Cycle (TALC), which is the most cited work in tourism geography (Gibson, 2008), emerged during the transition from quantitative geography to critical geography (Coles, 2006) and became a reference model that explained the evolution of tourist destinations as the model was applied to

diverse destinations and different approaches (Butler, 2006a, 2006b), the initial theory became more comprehensive, although many theoretical contributions and case studies also identified the model's limitations (Vera & Baños, 2010) (Fig. 2).

The TALC model acquired special relevance for both the management of coastal destinations and research on the destinations due to the need to identify the stage of maturity and address the issue of potential future decline (Agarwal, 2002, 2005). Based on this theory, Knowles and Curtis (1999) argued that the second-generation Spanish sun and sand destinations that appeared in the 1960s, which are currently mature destinations, faced an irreversible decline because of the destinations' loss of attractiveness, which was caused by changes in consumer motivations, the emergence of rival destinations and a fall in domestic demand due to the increasing popularity of travel to foreign countries. These authors categorically claimed that public and private proposals would only postpone the irreversible decline. However, their deterministic claim was based on the assumptions of a qualitative prospective study, and although these assumptions were based on real dynamics, they could not be verified. In contrast, Aguiló, Alegre, and Sard (2005) has argued that the increase in numbers of tourist arrivals and satisfaction levels supported the survival of the sun and sand model and the efficiency of the renovation initiatives carried out in the Balearic Islands. Similarly, Claver, Molina, and Pereira (2007) found that Benidorm hotels maintained a competitive position based on the number of overnight stays, per room occupancy rates, application of quality management systems and profitability levels.

Because the interaction between resorts and the market is complex, the symptoms of decline must be diagnosed and responded to proactively. As a result, the European Commission promoted a study to identify declining tourist destinations, which were defined as tradition tourism providers that exhibited negative trends, such as a decrease in the flow of tourists, deterioration in the quality of the destination, difficulty in guaranteeing sustainable tourism or the influence of exogenous factors (TNO Inro, 2002). This definition is too generic and vague because these indicators do not always reflect a structural decline, and the definition does not identify the threshold at which a decline has occurred. However, because this view did not limit decline to sector aspects but addressed the sustainability of development, this approach supported the claim that an environmental problems could also lead to

a tourism crisis by producing an unbalanced economic and social development for tourist destinations. However, Agarwal (2005) noted that the definition's criteria for decline were the consequences of it and that the key was to identify the causes rather than the symptoms of decline.

The concept of the TALC exhibits parallels to theories of productive restructuring. Both approaches agree on the need to engage in corrective measures to avoid the effects of decline. With the framework of productive restructuring theory, Agarwal (2002, 2005) viewed the decline of destinations as due to the interaction between internal forces that reduced the competitiveness of a destination and external factors that intensified competition. The global interaction process proposed by this author highlighted the importance of local conditions and actions to modify the effects of regional or global developments, in accordance with the 'glocal' nature of tourism development processes (Milne & Ateljevic, 2001). Deterministic approaches were often set aside in favour of local planning to maintain the competitiveness of different coastal destinations through diverse restructuring strategies. For example, Bramwell (2004) summarised the strategies employed by various destinations in the Mediterranean Basin; Anton (2011) classified coastal destinations in Spain as reactive, creative or transitive depending on the restructuring policies adopted; Priestley and Mundet (1998) analysed the post-stagnation phase of various destinations on the coast of Catalonia, Spain, region which Garay and Cànoves (2011) recently analysed by applying the TALC and regulation theory; and Oreja, Parra, and Yanes (2008) integrated teleological perspectives with the TALC to analyse Tenerife in the Canary Islands in Spain.

The recent evolution of destinations has also been explained in terms of a transition from Fordism to post-Fordism. Urry (1990) argued that cultural changes associated with post-modernism were the primary basis for the loss of attractiveness experienced by British coastal destinations since the 1970s. Poon's (1993) account has emphasised changes in demand and technological innovations, while Agarwal's (2002) has emphasised flexible production systems. However, not all authors accept accounts based on a linear transition from Fordism to post-Fordism. Certain authors (Agarwal & Shaw, 2007; Debbage & Ioannides, 1998; Torres, 2002) have argued that post-Fordist and neo-Fordist situations coexist in specific tourist destinations; for instance, the behaviour of international tourist operators exhibits new forms of mass production that coexist with customised travel and the diversification of tourist motivations.

In contrast, new patterns of international mobility (Sheller & Urry, 2004; Williams & Hall, 2002) affect established destinations with foreign residents which currently absorb temporary and permanent labour flows, as well as flows of short stay tourists due to the increase in low-cost airlines, which make air travel more accessible (Vera & Ivars, 2009). These flow increases have influenced real estate demand and favoured real estate tourism, which in turn has increased accommodation capacity and the municipal demographic range. González (2008) confirmed that the most important tourist destinations on the Spanish Mediterranean coastline were attracting inhabitants, investments, services and infrastructure.

Based on the above considerations, an analysis of established destinations must consider the effect of tourist activity on territorial structure and urban functions. Knafou (2006) stressed that the urban and demographic growth accompanying the evolution of tourist destinations tended to increase their complexity. This is an essential feature of 'tourist conurbations' such as the Côte d'Azur, the Belgian coast, the Costa Brava and Florida, where urban development has acquired a new dimension that can no longer be viewed exclusively in terms of tourism. On a local scale, these

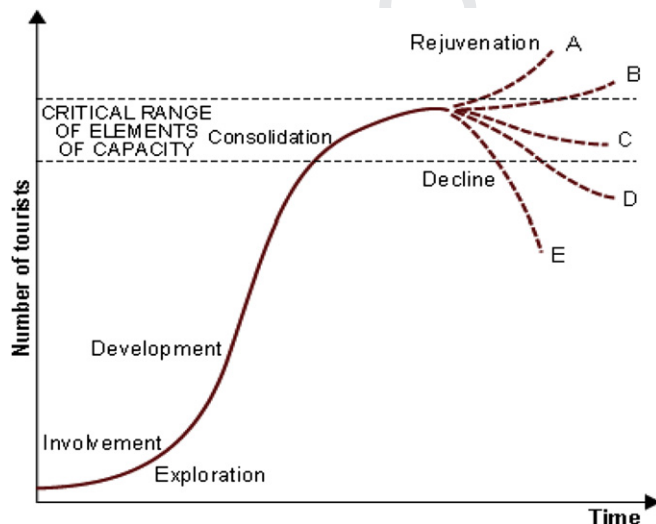


Fig. 2. The tourism area life cycle model (Butler, 1980).

dynamics have been examined for destinations such as Rimini (Conti & Perelli, 2005).

An analytical perspective that considers the importance of the economic functions of destinations and the extent of their centrality within a territory has been insufficiently developed in traditional tourism research, which has primarily focused on the evolution of tourism demand and ignored the territorial dynamics that arise from the evolution of tourist destinations. As a result, the most recent studies investigating Butler's life cycle theory have emphasised the need to analyse the spatial dimensions of the theory in greater depth (Hall & Page, 2009).

In summary, the dynamic and complex nature of tourist destinations precludes the application of pre-established theoretical models in favour of diverse theoretical approaches. The dialectical interplay between external and internal factors underlies the uneven evolution of tourist destinations, which are not necessarily fated to decline. Tourist destinations are able to adapt to circumstances and can influence their future evolution. Walton (2000) highlighted the resilience of British coastal destinations despite problems during the latter part of the 20th century. These destinations did not suffer terminal decline but experienced a role shift (Shaw & Coles, 2007). Despite the 'fascination' with decline, most coastal tourism destinations still attract visitors as some have or more than 200 years (Duhamel & Violier, 2009). Therefore, the key to survival lies in the ability to adapt to ever-changing circumstances.

### 3. Methods

According to the theoretical framework adopted in this paper, statistical data for the 1988 to 2010 period were analysed to identify the different phases of maturity of Benidorm based on variables relating to the destination itself and to the tourism environment, in particular tourism policies implemented during the period. To generate the evolution curve for the destination, overnight hotel stays were selected as the key variable because they are representative for destinations like Benidorm and the official statistics obtained from the monthly census-based survey of hotel establishments in Benidorm were reliable *Tourism Survey of the Valencian Tourism Agency*. The tourist overnight hotel stay variable was chosen because it was based on a monthly survey of the hotels in Benidorm and was available for a longer time period (1988–2010). This variable measured the influx of tourists occupying the almost 40,000 available beds in regulated accommodation. Moreover, use of the hotel survey made it possible to cross-reference other variables such as the mean occupation, seasonality and changes in markets of origin during the study period.

Although the total number of tourists visiting the destination was the most theoretically relevant variable, it could not be measured empirically because estimating overnight stays in apartments and at camping sites presented methodological problems and this information was only available for a shorter time period. In addition, although supply statistics – primarily the change in the number of beds – were analysed, the behaviour of these variables was more static and did not explain the cyclical demand component. As a result, these indicators were regarded as ancillary to the demand variables.

The differentiation of phases within the maturity period was complemented by qualitative research on internal factors in local tourism policy and management reflected in the opinions of different *stakeholders*. This approach regards the destination as an open system with private and public interdependent agents, in which the actions of one party affect other parties (Pulido, 2010). The 23 *stakeholders* selected were representative of the local tourism industry; interviews were held with individuals who managed and owned the most important independent hotels or

hotel groups, representatives of tourism industry associations with a multisector remit (apartments, camping sites, leisure industry, etc.) and political leaders and council officials who were responsible for tourism and related areas such as urban and environmental planning. Individuals were interviewed from January through June of 2010. The interviews were analysed using the *Atlas.ti* software program, which is based on Strauss and Corbin's (1990) grounded theory technique.

### 4. The complex evolution of Benidorm: different phases of maturity

The analysis of factors related to the global tourism environment, such as the evolution of the tourism market, economic cycles, sociopolitical contexts, and the public and private actions that formed the local responses describe four distinct stages for changes in the number of overnight stays at this destination:

- Phase 1. International recession and supply-demand imbalances (1988–1993)
- Phase 2. A new expansive phase (1994–2001)
- Phase 3. The stabilisation stage (2002–2007)
- Phase 4. Effects of the international economic crisis (2007–2009) (Fig. 3)

#### 4.1. Phase 1. International recession and supply-demand imbalances (1988–1993)

Phase 1 occurred after a period of economic expansion in Spain and the Valencia region, and the number of overnight stays reached a maximum between 1986 and 1987. In 1988, problems in adapting the tourism supply to changes in international tourism demand, such as changes in travel preferences, staggering of holidays, more complex and diverse travel motivations, and increasing competition from more exotic tourist areas created a climate of uncertainty. Within a year, a tourism crisis both at the national and at the local level was generally acknowledged. There was a significant reduction in overnight stays and a slight decrease in arrivals of visitors due to factors such as the appreciation of the peseta and the Spanish inflation differential. The recession led to questioning of the traditional sun and sand model and the idea that successful tourism meant a quantitative growth in demand, leading to proposals for diversification of tourism offerings and markets.

In 1990, other international factors, such as the Gulf War in the Middle East, ended the sustained growth and expansion of international travel. In Spain, the crisis was widespread and the 1990 season was considered the worst of the decade. The trend observed in the previous year was magnified and the number of visitors – in particular, British visitors – continued to decrease. This was partially attributed to the rise in the exchange rate of the peseta with respect to other currencies, inflation and economic recession in important tourist-generating countries, such as Great Britain.

The situation improved in 1991, and exogenous factors, such as the reduced popularity of other destinations such as Greece and Turkey, were associated with an increase in the number of visitors and overnight hotel stays. In 1992 and 1993, the tourism industry in Spain improved; fewer Spaniards travelled abroad and favourable exchange rate following the devaluation of the peseta made Spain more competitive as a destination by increasing the spending capacity of foreign tourists.

This trend was also observed in Benidorm, where there was a transition from a positive to a negative dynamic, particularly for the primary international (British, Belgian and Dutch) markets; this contrasted with the behaviour of the national market, which was

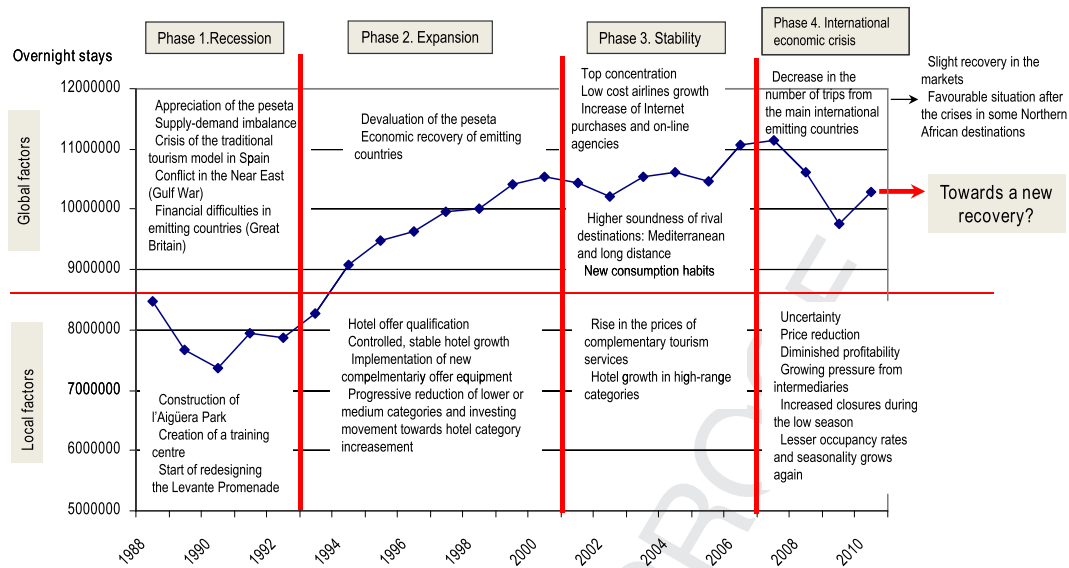


Fig. 3. Recent evolution phases and factors impacting on the tourism and territorial dynamics of Benidorm (1988–2010).

more uniform. During this phase, the hotel capacity in Benidorm was relatively stable. At the beginning of this phase, 31,370 beds were available (42.8% of the total hotel beds in the Valencian region in 1988). In 1994, at the end of this phase, there were 32,238 beds – an increase of only 2.8%. It should be noted that at the beginning of this phase, most of the primarily 2- and 3-star hotels in Benidorm had been built between 1960 and 1970 during the tourist boom, and hotel bookings were primarily made through tour operators, which created fewer fluctuations in demand compared to destinations that depended on occasional tourists.

At this time, Benidorm had much more to offer in regard to recreational and leisure facilities than surrounding destinations. A privately financed water park was just one of the attractions that targeted visitors of all ages. During this stage, Benidorm also became the base for day trips to nearby villages, which were requested by international tour operators and organised by local businessmen. Incorporating these elements added value to the sun and sand package holidays (Vera & Baños, 2010). During this stage, public initiatives focused on urban planning and improving environmental quality to enhance competitiveness with rival sun and sand destinations, and a strategic marketing plan (1991) was developed to introduce new ways to promote the town.

In l'Aiguera, part of the riverbed that cut through the town was used to create an extensive public park with open spaces, landscaping areas and venues for open air shows. The project, which was designed by the architect Ricardo Bofill, integrated the space into the town, which added value to the immediate surroundings. The Levante beach seafront promenade – a project designed by another renowned architect, Oriol Bohigas – was also constructed during this period and made the beach, which was the location most frequented by visitors, much more attractive and accessible.

Because a dearth of well-trained staff was generally considered to have contributed to the Spanish tourism crisis, regional authorities created a Tourism Training Centre in Benidorm to improve the qualifications of tourism professionals. This centre was the first in a network of regional centres.

#### 4.2. Phase 2. A new expansive phase (1994–2001)

With the improvement in the economy in Western Europe and the devaluation of the peseta, a period of recovery began in 1994.

Both nationally and regionally, this phase was characterised by growing revenues, more overnight stays and increased tourist spending. Locally, the recovery was reflected in the number of overnight stays of foreign visitors, particularly British tourists, which exhibited an increase of 58% by 2001, although the total number of overnight stays increased by only 15% due to the decrease in the number of overnight stays of Spanish visitors. This period was characterised by occupancy rates of approximately 95% in 2000 and 2001.

The total number of hotel beds remained stable. However, there was a progressive reduction in the number of lower rated establishments, and companies began to invest in upgrading the classification of their hotels. This trend was favoured at the regional level by a new regulation that introduced a classification system based on fulfilment of specific technical requirements. The regulatory aim was to make the structure of the sector more transparent and decrease the number of small guesthouses either by closing them or reclassifying them into different categories.

Tourism policies during this period were characterised by new public works projects to create urban landmarks and improve public spaces that reinforced the image of a quality sun and sand destination. A major investment during this phase was the state-financed renovation of the seafront promenade along the Levante beach, which was completed in 1996.

However, a radical change in policy also occurred during the 1990s, which involved the creation of an urban leisure and recreation area that was separate from the town itself. Thus, the regional government financed a major theme park that opened in 2000. The park was described as a renovation of the tourist destination intended to attract new demand segments to Benidorm and the surrounding area. The new park was located outside the town of Benidorm, associated with beaches and urban spaces, and generated a separate urban growth process. Apart from the question of property speculation, the decision to build outside pre-existing structures was influenced by the idea that theme parks made tourist destinations more competitive, and the construction of the new park was viewed as the driving force for a new phase in the evolution of Benidorm. Therefore, the Special Master Plan for Uses and Infrastructures 'Theme Park Area' Benidorm-Finestrat approved in 1998 by the Regional Department of Public Works, Urban Planning and Transport not only created a macrostructure

that focused on themed leisure but also simultaneously introduced new activities, such as golf, and favoured the construction of hotel and residential accommodation. Although after a decade, the outcome was disappointing, the park contributed to the development of a new leisure area and residential homes outside of the town (Vera & Baños, 2010).

However, regional tourism policies that supported the modernisation of tourism establishments and authorities' efforts to improve beach facilities and services had a more positive effect on tourism in Benidorm during this period. In turn, the local business sector not only contributed to the development of new recreational products but also constructed new hotels and progressively modernised existing establishments to meet visitors' growing demand for quality.

#### 4.3. Phase 3. The stabilisation stage (2002–2007)

Phase 3 was marked by the convergence of global trends that significantly affected the tourism market: the growth of low-cost airlines, which gradually replaced charter traffic; the increase in online sales; changes in tour operators strategies; and the growth of rival destinations that provided an alternative to traditional sun and sand destinations. From the perspective of the global economy, this stage of stabilisation was initially influenced by the loss of confidence in air travel created by the 9/11 attacks in the United States in 2001 as well as negative factors in 2003, such as the Iraq conflict, the weak economies of European tourist-generating countries, and the increasingly strong euro.

The new market dynamic produced changes in international tourism, primarily in the British demand, which was channelled through low-cost airlines and affected coastal areas such as Benidorm, the Costa Brava in Catalonia and the Costa del Sol in Andalucía (Ivars & Menor, 2008, pp. 89–104; Martínez, Prats, & Barceló, 2004). The length of stay and the number of travellers on package tours staying at hotels decreased, although the increase in airport arrivals had a positive impact on hotel occupancy in absolute terms. However, the increase in non-hotel accommodations and increase in the number of hotel beds decreased hotel occupancy rates.

With regard to hotel supply, the last significant investments in creating new hotels occurred between 2001 and 2007. The favourable economic situation in Spain and consolidation of the tourism industry encouraged the business sector to open new establishments, leading to an 11.4% increase in the number of hotel beds available. This period was also characterised by a real estate market boom, which led to the creation of a large number of non-hotel beds due to the growth of residential tourism.

In regard to tourism policies and business strategies during this stage, it should be noted that efforts to achieve diversification with the construction of the theme park did not result in the desired economic growth or the expected increase in the number of visitors. One reason for this failure was that the infrastructure, which was intended to accommodate 3 million visitors, actually received only 2 million visitors in 2001 and 1.1 million in 2008. Paradoxically, despite this failure, the park did have a positive effect on the renovation of first-generation recreational infrastructures, which increased the attractiveness of the destination. However, the impact on family tourism and the average length of stay was less than expected. The themed leisure concept was extended through two additional installations – a nature park and a water park. Despite this recreational supply, Benidorm failed to create a true leisure-based product based on a combination of different leisure and accommodation options, integrated and marketed as a single package. With the construction of two new golf courses and higher-category hotels near the theme park, this destination renovation was linked to the introduction of new leisure products, such as golf

in 2005. Unfortunately, to date the results have not been as successful as predicted.

The hotel sector contributed to the diversification of the destination during this period with the opening of establishments in up-and-coming areas that catered to new demand segments in addition to the sun and sand product. The construction of 4- and 5-star hotels with facilities for hosting events, conferences and conventions targeted sectors with greater purchasing power, as well as families and the health and beauty market. The first two 5-star establishments in the municipality were erected during this stage. In 2006, the golf, spa and *business* resorts were initially managed by the *Starwood Hotel and Resorts* international group, which ran it under its *Westin* luxury brand until late in 2007 when the group stopped managing the establishment due to disagreements with the owners. The resort has experienced serious financial difficulties since then and filed for bankruptcy in 2010. Despite financial problems, the two hotels remain open. The second establishment was constructed in 2008 and marked the reappearance of an international Spanish hotel chain with a product targeting a luxury clientele; from the outset, this establishment distanced its product brand from the Benidorm image.

During this phase, considerable renovation and modernisation of existing establishments occurred, which coincided with the positive, stable economic situation for tourism. However, few obsolete establishments were demolished or completely remodelled; in most cases, existing buildings were rehabilitated on a small scale.

#### 4.4. Phase 4. The effects of the international economic crisis (2007–2009)

During this phase, the world economy experienced a severe recession of historic proportions, which was characterised by uncertainty, high market volatility and loss of consumer confidence. Despite the fact that tourism withstood the international economic crisis better than other sectors, data on hotel occupancy and profitability reflected the economic downturn. For Benidorm, this situation was aggravated by the state of the British economy and the appreciation of the euro relative to the pound, which only started to recover its value relative to the euro in 2010. Data from the revenues per room available (RevPAR) indicated a widespread drop in Spanish hotel revenues due to a price war in which rates were significantly reduced to boost sales. However, this indicator recovered in 2010 and the prospects for 2011 were favourable (Exceltur, 2011).

During this period, overnight stays in Benidorm decreased and reached levels similar to those observed in 1996, when there was an 11.9% decline between 2006 and 2009 due to a dramatic 31% decrease in the overnight stays of British travellers. As in the earlier period, the national market offset the international downturn because more Spanish travellers took shorter trips within Spain, and there was a rise in the number of overnight stays in 2010. Furthermore, in 2009, a progressive reduction in the annual occupancy rate led to the lowest occupancy rate for all of the years studied. This level was lower than the 75.2% rate for 1990 that occurred at the height of the earlier recession. Similarly, more hotels closed during the winter. Although this is common practice in many coastal destinations, it was less frequent for Benidorm, where tourist activity is less seasonally based.

With regard to the supply of accommodation, prices were progressively reduced during this phase due to the highly competitive market, with serious repercussions for business profitability, which previously had been characterised by an efficient quality-price ratio and adjusted profit margins. In 2009, Benidorm hotel revenues were negative, with a variation rate from January to

December of –9.4% in the accumulated annual RevPAR compared to the same period in the previous year (Exceltur, 2011). In 2009, the accumulated RevPAR from January to December for 3-, 4-, and 5-star holiday hotels in Benidorm was €37.90 compared to the Spanish average of €45. However, the Spanish average remained €44.80, and the RevPar for Benidorm hotels rose to €40.50 in 2010.

In regard to tourism policies and business strategies, the renovation of the seafront promenade along the Poniente beach was completed in 2009. The renovation was expected to add value to one of Benidorm's emblematic beaches and revitalise tourism by attracting new investments and business models and enhancing improvements to establishments. This urban development initiative, which was financed by the regional government, was part of a strategy to enhance seafront areas and was intended to serve as a modern architectural landmark and symbol of avant-gardism. Public investment also focused on the creation of new strategic infrastructures designed to promote new forms of tourism linked to culture and business, such as the Cultural Centre currently under construction. Another project envisaged the construction of a sports area in a public park for domestic professional sports tourism or for winter training sessions of European professional athletes. Additional efforts to diversify products and demand segments included hosting sports events outside the tourist season and organising musical events to attract young visitors to the destination during the summer. In regard to infrastructure related to tourism, the regional government selected Benidorm as the headquarters for the Valencian Institute of Tourism Technologies. This centre, which specialises in R&D&I in tourism opened in 2009, being dependent on the regional government with the collaboration of the Town Council of Benidorm and the leading tourism associations in the Valencian Region.

Although there were no signs of urban decay – which was not the case for other destinations that developed during the early days of the Spanish sun and sand tourism model – it would be worthwhile to remodel Benidorm's urban fabric to make urban development a competitive feature of this tourist destination once more. There have been few truly innovative proposals, apart from recent initiatives for the pedestrianisation and renovation of the traditional centre to increase the attractiveness of the surroundings and atmosphere – one of this leisure town's greatest assets.

However, because high debt levels reduced the ability of the town council to invest in renovation, these activities would be dependent on external financing. It should be noted that external sources – either the regional or central government – financed most of the recent renovation of urban public spaces.

Regarding tourism management in the municipality, this phase saw the incorporation of an innovative management structure that aimed to foster closer collaboration between the local authorities and tourism entrepreneurs in promoting the destination and revitalising the city's tourist image. The creation of the Benidorm Tourism Foundation was similar to many towns' adoption of new management formulae creating mixed entities in which both municipal authorities and the business sector managed and promoted destinations. One of the initial tasks undertaken by the Foundation was to produce a Tourism Marketing Plan in 2011 to adapt the town's image and marketing strategy to new market trends.

## 5. Benidorm's recent evolution and future prospects: local stakeholders' opinions

From the perspective of public and business policy, it is important to obtain the opinions of different local interest groups or stakeholders, which are crucial for understanding the processes that have contributed to the evolution of this tourist destination

because the future of the destination depends on their activities. Stakeholders were recruited from the business sector and public management and discussed the following issues:

### 1. Evolution phase of the tourist destination

With the phases of Butler's life cycle model as a reference, interviewees were initially asked to identify the current phase of Benidorm's evolution because their judgment would indicate a positive or negative view of the current situation and condition the perception of the destination's future evolution. Based on the responses, a majority of the business sector regarded Benidorm as having entered a phase of stagnation. However, a wide variety of opinions were expressed. The more pessimistic respondents believed that the destination was currently in decline while others believed that Benidorm was experiencing a process of rejuvenation due to the new attractions (themed leisure and golf) integrated into the destination and infrastructure improvements (the seafront promenade along Poniente beach), which were regarded as proof of dynamism as well as rejuvenation capacity. It should also be noted that some opinions reflected a political basis.

### 2. The tourism industry model and aspects linked to new market trends

According to the entrepreneurs interviewed, the predominance of local entrepreneurs and business owners in Benidorm has positively influenced this destination because private ownership motivates investments that promote future survival to a greater extent compared to renting or franchise-based management: "Since this is a very competitive market with small profit margins, a company that operates but does not own a hotel may see it as a viable business, but believe that it does not generate sufficient profits or cash-flow to invest in renovation. However, an owner-operator of a hotel will be willing to sacrifice profits and cash-flow to invest in the quality of the hotel's facilities" (hotel group manager). Furthermore, the entrepreneurs who invested in their own business were more likely to maximise spending efficiency and cost reduction seeking the best possible value for money: "It is very difficult for a small business to obtain the funds necessary to renovate. It's easier for a chain. However, a family business is willing to make greater efforts to renovate and takes more interest in the details than a hotel chain. Moreover, it's possible to save money on the renovation because the owner looks for the best product at the best price" (hotel group manager). In the entrepreneurs' opinion, this aspect –the high quality delivered in relation to the price paid for the service– was a positive factor that distinguished this destination because a significant effort was made to maintain high quality service despite the serious problems of decreasing marginal profits and progressive price reductions: "Benidorm is one of the resorts with the best price-quality ratio, businesses work hard and we prefer to lower prices to obtain more clients... after all, people attract people" (hotel owner).

Another characteristic feature of demand in the Benidorm tourism model was the coexistence of Spanish and British tourists within the holiday segment. According to the interviewees, the domestic market guaranteed a good summer occupancy rate when the British market was affected by economic recession. Although an effort was being made to search for new demand sectors, such as gay tourism or singles, as well as sectors associated with new travel incentives, such as events, sports, and business, these were still minor segments that had little impact on the global demand for this destination.

In regard to the hotel supply, new demand trends and tour operators' increased marketing of destinations such as Turkey or Egypt, had gradually forced businessmen to diversify their sales channels. Direct sales were a medium-term option that currently complemented tour operations and might become more important



in the future: “tour operators are in decline but that’s not a problem for Benidorm, the problem is changes in the market: higher margins in other destinations, new technology that directly affects traditional tour operators as well as the influence of low cost airlines. Now with the crisis, some people are going back to tour operators, some clients know that a low cost airline can leave them stranded, and also tour operators are lowering their prices” (tour manager). More recently, tour operators themselves were affected by the difficult economic situation, which led them to reduce prices further. As a result, the business sector has become increasingly critical of the traditional model.

### 3. Investment in business renovation and innovation

The entrepreneurs that were interviewed agreed that the hotels in Benidorm had undergone continuous refurbishment and maintenance and that business renovation policy had progressively adapted to the new quality requirements demanded by the market. Investment in renovation has consequently maintained an upward trend that was considered necessary to guarantee business survival: “a lot of investment is being made; there is a big increase in the number of hotels that are being renovated. Businessmen are aware that you have to renovate or die” (hotel industry association). Because local entrepreneurs are owner-operators, they might tend to invest in renovation and these efforts would reflect their understanding that renovation was a key factor in remaining competitive and surviving in the market.

However, there was less investment in innovation as a strategy, although this aspect deserves greater emphasis. Few of the interviewees thought that these investments were increasing and the ones made focused on new technologies for commercialisation that would generate more direct marketing in the future.

### 4. Levels of business training and cooperation

Analysis of the knowledge and training level of interviewees revealed divergent views regarding this issue. Most interviewees had a positive view of the business training available due to the

existence of the Tourism Centres, which provided training adapted to the needs of the sector and various professional profiles. Some interviewees also noted that changes made to professionalise marketing and direct efforts towards the end consumer rather than tour operators increased the importance of training. In contrast, there were negative assessments of the degree to which managers and owners took advantage of the available training, and differences in training tended to be associated with generational differences between traditional businessmen with a great deal of accumulated experience and new professionals who were highly trained and conversant with new ideas.

With regard to business cooperation, interview responses reflected the individualism characterising the business sector and low levels of cooperation between individual businessmen, although entrepreneurs felt that they were represented by a ‘strong and powerful’ association.

### 5. The future evolution of the destination and proposals for maintaining competitiveness

Most of the interviewees – and businessmen, in particular – were optimistic about the future of Benidorm. In their view, the destination’s long history and experience with tourism guaranteed future competitiveness. The professionalism characterising the sector, which created high levels of customer satisfaction, together with the creation of a tourism management body combining public and private participation, exerted a positive influence on their vision of the future. Only a few interviewees believed that the favourable evolution of this destination depended on increased business cooperation or innovation.

Finally, business sector proposals to guarantee the future competitiveness of Benidorm focused on the need to increase public investment to renew the attractiveness of an urban scene that exhibited obsolescence in certain areas. In addition, many interviewees believed that greater efforts to improve marketing strategies and enhance the Benidorm image were needed due to

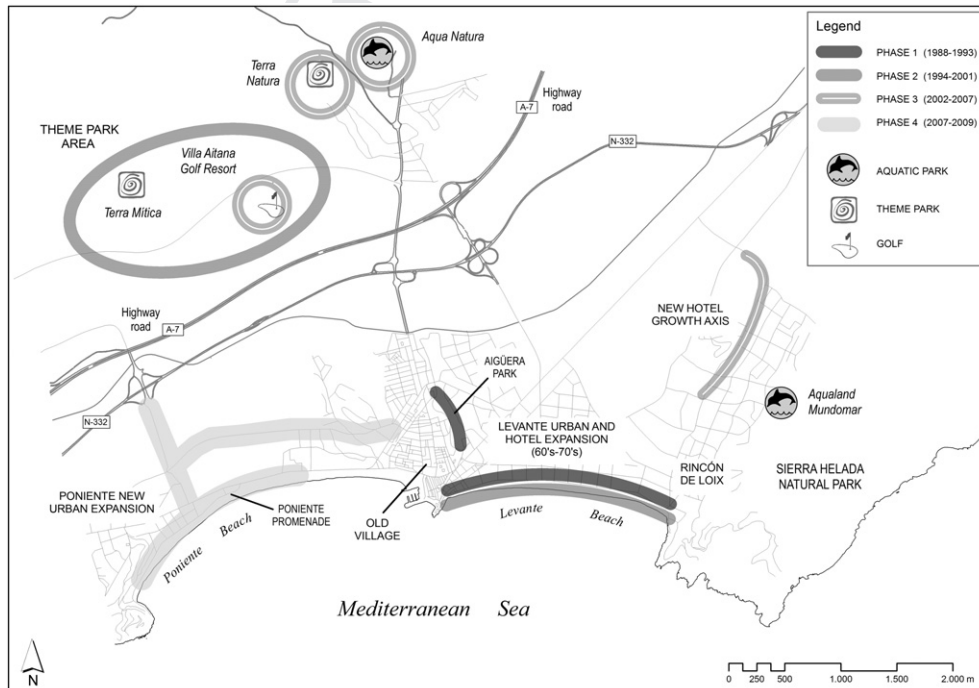


Fig. 4. Tourism and territorial dynamics in Benidorm.

negative connotations associated with mass tourism and the senior citizen segment. There were also proposals to optimise existing tourism resources by diversifying the types of tourists visiting Benidorm and introducing new products such as sports or events tourism. Other relevant proposals suggested a higher degree of coordination between the various stakeholders as well as more internal cooperation within the business sector. Public management interviewees agreed with some business proposals such as the need for diversification, although political considerations prevented them from discussing negative features identified by the business sector.

Based on these proposals, interviewees believed that Benidorm's future renovation needed to be both tangible and intangible – focussing on image, coordination, cooperation, and adaptation to new trends – with an emphasis on repositioning the destination through strategies that diversified products and attracted new demand segments.

**6. Evaluation of tourism and territorial dynamics in Benidorm: a summary**

In summary, the present study of the phases of the evolution of this destination identified several key aspects of the life cycle of destinations and the interactions between global factors and local models. During the period under analysis, remarkable global structural transformations occurred that markedly changed the operation of conventional tourist destinations. Online booking, the expansion of low-cost airlines, the redistribution of tourist flows to

medium- and long-distance destinations, the growth of independent tourism and the increased use of non-hotel accommodation were only a few of the factors that influenced tourism. Since 2008, these factors operated within the context of an international economic recession, which has affected tourist arrivals and business profitability, although there were signs of recovery in 2010. For any tourist destination, including Benidorm, these circumstances reflect a new dialectical destination-environment dynamic, in which a global context presents both threats and opportunities for the continued evolution of destinations.

From the point of view of demand, the statistical data for the period examined exhibited positive trends in regard to the outstanding occupancy rate and the number of overnight stays, which continued to be significant (see quadrant 1 of Fig. 5). However, some aspects, such as business profitability, require further investigation. Businesses with increasingly small profit margins become more vulnerable to economic crises and the episodic threats that affect destinations, which might eventually limit their ability to renovate their establishments. The present study indicated that the hotel model – unlike the isolated resort or enclave models – was a key factor in the tourist town renovation process because it was part of a concentrated urban structure that was based on establishments owned and operated by local entrepreneurs who were committed to the destination and had the know-how to offer a high quality for the price. Despite on-going difficulties, the hotel business in Benidorm proved to be more resistant to the crisis than other tourist destinations that relied on urban sprawl processes or a residential model based on non-hotel

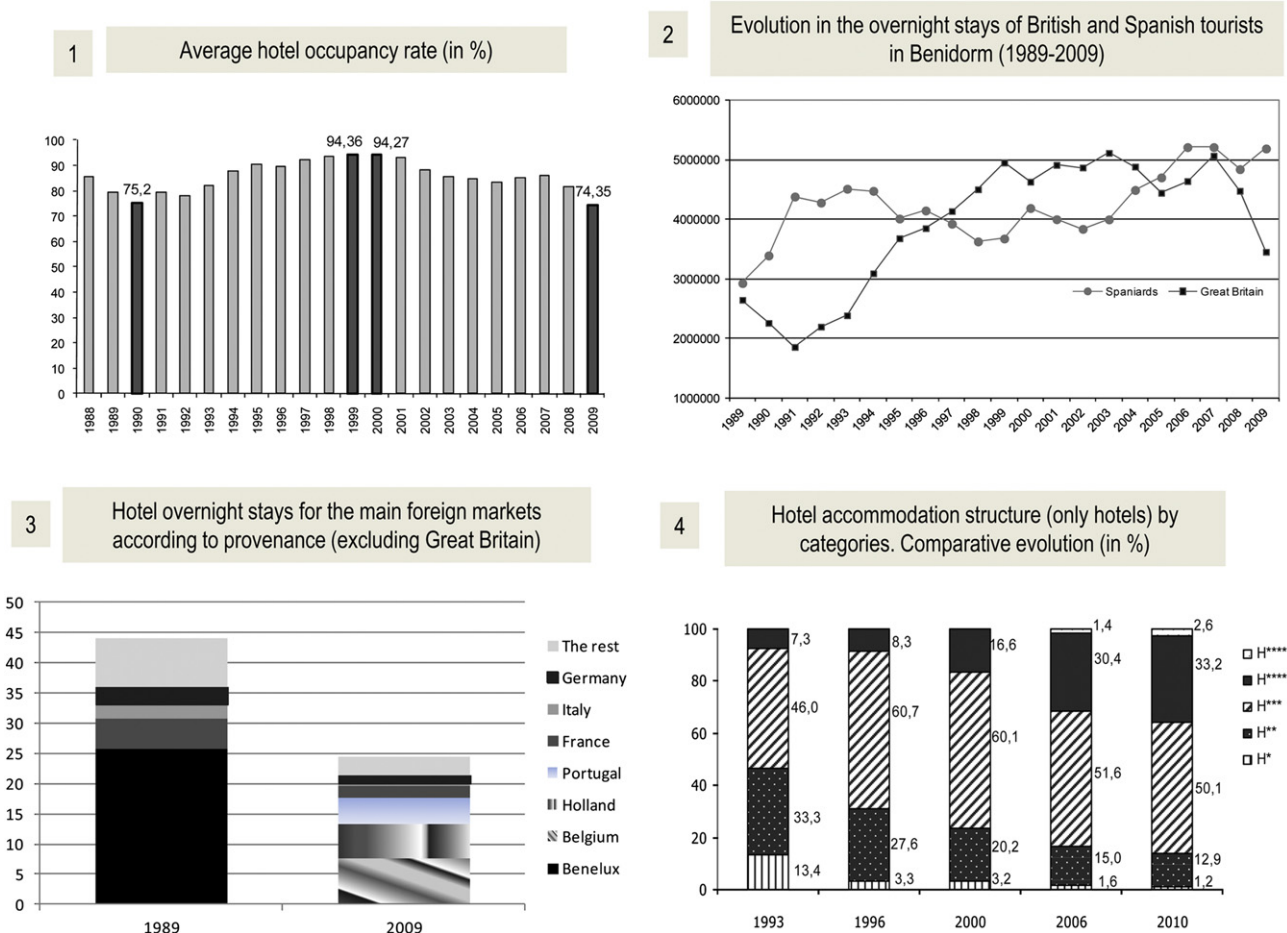


Fig. 5. Assessment of the evolution of tourism in Benidorm according to key supply and demand variables.

accommodation. Moreover, hotels exhibited greater economic dynamism and were less affected by seasonality than tourist homes.

Another key element influencing demand was the effect of dependence on specific markets. In the case of Benidorm, the recession phases in the period under analysis primarily corresponded to crises in the British economy because of the dependence on the British market and the unfavourable exchange rate of the pound with respect to the peseta or euro. However, when the British market experienced a recession, domestic demand contributed to the overall number of overnight stays and offset the effects of dramatic drops in British tourism (see quadrant 2 of Fig. 5). The dependence on the British market became evident when the volume of tourists coming from other foreign markets was analysed (see quadrant 3 of Fig. 5). Benelux (Belgium, Holland and Luxembourg) was Benidorm's second most important market, followed by countries such as France, Italy and Germany, which accounted for a progressively smaller percentage of overnight stays during the period studied. It should be noted that although these markets gradually became less important, no new countries – apart from Portugal – compensated for the loss. Portugal was first included in the official statistics in 1999 with a higher number of overnight stays than the last countries mentioned, although the number has remained stable with no significant growth over the years.

The present study revealed the effect of new marketing methods due to new forms of international travel that emerged during the last decade, in particular, the emergence of *low cost* air travel, which increase connections with the most important tourist generating areas and opened new markets. Furthermore, the presence of foreign residents living in the tourist destination on a regular basis was another factor contributing to the demographic and economic dynamics as well as the image of the tourist destination.

Following restructuring theories, the high repeat visit rates found in the present study revealed that Benidorm had a number of characteristics, such as the relationship between the urban configuration model and the tourism dynamic, that enabled the destination to continue to satisfy demand. The contribution of well-known comparative advantages (climate comfort, beach quality, and accommodation critical mass), the excellent value for money offered by Benidorm and the *know-how* of local firms ensured the destination's competitiveness and survival. These destination features were reinforced by local initiatives from private businesses and public agencies. Rather than modifying global processes, these initiatives confronted challenges by adapting to the changing situation. Similarly, restructuring of the destination extended beyond the limits of the municipality. Benidorm's role as a major tourist destination has made it the most important urban centre within a tourism district that provides services meeting the highest standards where companies and public bodies interact in the tourist industry.

Benidorm, which first emerged as a major sun and sand destination when mass tourism spread to the shores of the Mediterranean, has a long tradition of tourism. One of the critical aspects in its evolution was the renovation of hotels and of the destination as a whole in the 1990s to adapt the traditional tourism supply in Spanish coastal destinations to the new trends in European demand. The hotels in Benidorm renovated to revitalise the destination and have continued to do so to maintain competitiveness. During this period, hotels in Benidorm were gradually up-graded and higher-category establishments appeared on the market, while the percentage of lower-category hotels decreased (see quadrant 4 of Fig. 5). The renovation of the hotel supply due to the transformation of existing establishments and the construction of new medium-high-category hotels improved the image and dynamic of the destination. Although some earlier public investments, such as the construction of the theme park, did little to

improve the competitive position of Benidorm in the market, renovation of both the hotels and the destination as a whole should continue. Renovations such as improving different components of the urban scene, adding new infrastructure, and protecting certain areas should be undertaken but will be more difficult in the future because these measures require public investment and there have currently been severe budget cuts.

The mid-1990s policy of using public funds to finance new tourist-urban development schemes separated from the town itself (see Fig. 4) raised the possibility of promoting two distinct brands for the Benidorm destination: one for the general market and the other for the *Premium label* segment with higher purchasing power. Although certain business groups have defended the policy of destination *rebranding* – which sought to revitalise the image of Benidorm as a mass tourism destination – this policy might have undermined Benidorm's success as a resort for middle and lower middle-class visitors. Furthermore, few hotels targeting the higher income segment have enjoyed success and the high-end product offerings do not seem to have created a new product or a distinct brand.

Finally, sustainability is an important criterion for evaluating this stage of the evolution of this tourist destination as well as a strategy to ensure competitiveness that might improve its economic, social and environmental dynamic. The overcrowding of coastal destinations due to tourism has always had a devastating effect on the local environment. However, new proposals have noted that lower environmental costs are associated with concentrated high-density urban models, and publication of a study commissioned by Thomson Holidays, the most important tour operator working with Benidorm, has motivated several proposals that are currently under discussion in the media and academic and technical forums. The study identified the '*Benidorm effect*' as a paradigm for tourism sustainability based on carbon emissions data (distance from emitting areas and airports) and the density of the urban model, which resulted in lower costs for infrastructure, reduced land use and lower water consumption. For instance, water consumption in Benidorm is approximately 200 L per person per day, which is considerably less than the water consumption of nearby residential tourism models, which is approximately 400 or 500 L per person per day. Moreover, a substantial part of the water consumed in Benidorm is treated and re-used for urban and agricultural purposes. Furthermore, the policy of protecting ecologically valuable areas has led to an area on the outskirts of the town being declared a natural park. The environment and landscape of this area, which includes a coastal mountain range, a few small islands and surrounding coastal waters occupying a total surface area of 5654.97 ha, are in stark contrast with a region that has characteristically shown extensive anthropisation. Furthermore, because the wealth of fish and plant species on the sea floor make it one of the most valuable underwater areas in the Western Mediterranean, it has been classified as a Place of Community Interest with Areas of Special Protection for Birds and forms part of the *Natura 2000* Network. An approach focused on environmental conservation provides the opportunity to create a product associated with nature, broadens the range of recreational possibilities, and favours an image that is not exclusively identified with the leisure town and its beaches. However, this approach would demand a change in initiatives and strategies developed by public and private tourism professionals, who continue to prioritise conventional products and traditional markets.

## 7. Conclusions

Although theories and models allow us to interpret the dynamics and phases that tourist destinations' go through they

cannot entirely explain the complexity of local tourism systems and their interaction with the market. The difficulty increases when analysing the unique destination of Benidorm, which presents internal factors derived from the local context which play a key role in understanding its urban and tourism model. Benidorm's evolution illustrated non-deterministic features of evolutionary models that reinforced neo-Fordism and identified the importance of the local ability to engage in productive restructuring processes. Nevertheless, the influence of the economic cycle on tourism demand must be distinguished from the effects of structural changes in the tourism market because adapting to structural changes is essential to maintain competitiveness despite temporary fluctuations.

The evolution of this tourist destination has been marked by the integral relationship between the urban model that is the basis of the accommodation system and the commercial and recreational activities that developed within the urban structure, which arose during the boom period. However, this tourist model, which strongly influenced Benidorm's tourist image must adopt innovations that maintain Benidorm's status as one of the great international leisure and tourism destinations. Interviewees believed that to optimally employ marketing and public-private collaboration strategies, the most important challenge facing Benidorm was to revitalise its image and eliminate the negative social connotations associated with its image as a travel destination.

The profitability problems associated with infrastructures such as the theme park and the hotel complexes outside Benidorm indicated that diversification attempts based on attracting new demand segments and creating new products were not successful and suggested that Benidorm should continue to target middle-class tourists because the perceived image of the town might make it difficult to attract market segments with higher purchasing power.

Similarly, the *stakeholders'* analysis of the situation – in particular, the key features identified by the business sector – led to interesting conclusions. Local entrepreneurs maintained the competitiveness of the destination both by investing in renovation and by implementing new business models adapted to market trends. Innovation as a strategy remained an issue, although interviewees exhibited a willingness to invest in product-oriented R&D&I to diversify demand and create distribution channels that attracted both customers of tour operators and direct customers to increase profitability. The gradual reduction in the importance of tour operators might require entrepreneurs to change their sales strategies, and generational change might also lead professionals in this sector to abandon more traditional approaches and practices in favour of new methods of managing businesses.

Finally, the analysis of Benidorm in light of current theories and models of the evolution of tourist destinations led to the following conclusions:

- The competitive advantage of this destination was due to its unique urban tourist model, which is based on hotels and economies of scale that create a critical mass of accommodation and recreational facilities. Thus, Benidorm as a leisure town distinguishes itself from seasonal tourist destinations along the Mediterranean coast.
- The market effects of economic cycles directly interacted with the evolutionary phases of a destination.
- The hotel industry was able to renovate due to public incentives and local planning legislation because most hotels were privately owned with owners who were committed to the destination. As a result, very few hotels were converted into residences or used for other purposes.
- Mass tourism was compatible with the sustainable management of environmental vectors such as the hydrologic cycle,

land consumption, and urban mobility, which affected the destination's carrying capacity.

- Differentiated products for different types of consumers in the same destination continued to be developed.
- Rejuvenating operations, such as creation of the theme park, had a limited impact, whereas the general renovation of hotels had a significant positive impact.

The present study thus identified new ways to analyse the evolution of coastal tourism destinations that revealed Benidorm's status as an exceptional tourist destination and explained its capacity to adapt to the evolution of tourism over the last fifty years.

## Knowledge

The study was carried out within the framework of the research project *Renovación de los destinos turísticos consolidados del litoral: nuevos instrumentos para la planificación y gestión* (RENOVESTUR) [Renovation of consolidated coastal tourist destinations: new instruments for planning and management] of the *Plan Nacional I+D+I 2008–2011* [National R&D&I Plan 2008–2011] of the Ministry of Science and Innovation.

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