

**J. Fernando Vera Rebollo,
Isabel Rodríguez Sánchez, eds.**

Renovación y reestructuración de destinos turísticos en áreas costeras

Marco de análisis, procesos, instrumentos y realidades



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y realidades

J. Fernando Vera Rebollo
Isabel Rodríguez Sánchez
(eds.)

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Presentación

En el marco de la teoría del ciclo de vida de los destinos turísticos, la madurez constituye la fase crítica desde la que se puede transitar hacia la decadencia, pero también orientarse hacia la reinvención, mediante políticas de reestructuración, renovación y recualificación del destino. Consolidación o madurez, en teoría, preceden a la obsolescencia y, si no se actúa a tiempo, a la necesaria reconversión (Exceltur, 2003; Perelli y Prats, 2007).

En este marco de análisis, ya desde los años ochenta del pasado siglo se vienen percibiendo signos y síntomas de agotamiento del modelo masivo y estandarizado de vacaciones en áreas costeras, sin por ello dejar de reconocer que los destinos costeros, o al menos algunos de éstos, han sido capaces de perdurar, e incluso de revitalizarse y reinventarse (González y Anton, 2008), mediante distintas estrategias. De hecho, a pesar de haberse pronosticado una tendencia irreversible hacia el declive los destinos maduros del Mediterráneo (Knowles y Curtis, 1999), los centros consolidados de turismo litoral han seguido funcionando, e incluso creciendo, mientras surgen nuevas áreas competidoras centradas en este mismo producto.

Los debates académicos y técnicos sobre la redefinición del modelo de turismo costero, iniciados en los años noventa, inciden en la visión integral del destino para garantizar su competitividad y capacidad de atracción. Si bien la renovación y reestructuración de destinos se ha de interpretar en el contexto de la evolución de los destinos turísticos, objeto de investigación desde la geografía del turismo desde hace décadas (Vera, López Palomeque, Marchena y Anton Clavé, 2011). La aportación de modelos teóricos y análisis empíricos ampliamente debatidos, cuyos precedentes se remontan al estudio de los destinos ingleses y, sobre todo, a algunas aportaciones aparecidas desde los años setenta del siglo XX, de carácter generalmente crítico, enfatizan el predominio del turismo de masas como estadio final de la evolución de los destinos. Entre estos trabajos, destaca la publicación del más citado de los artículos sobre el ciclo de vida (Butler, 1980), el modelo de referencia más debatido y comentado para describir los procesos de evolución de los destinos turísticos. La reciente publicación de dos volúmenes donde el mismo autor revisa aspectos de esta teoría (Butler 2006a; 2006b) es una muestra del interés y la controversia que continúa suscitando, habiéndose enriquecido la propuesta inicial, y evidenciado sus limitaciones, con aportaciones teóricas y estudios de caso posteriores.

Como línea de investigación, la evolución de los destinos turísticos recobra vigencia ante las transformaciones operadas en el mercado turístico y el nuevo escenario que se perfila, en el cual surge el recurrente debate en torno al futuro de los destinos turísticos que cuentan con amplia trayectoria y elevada especialización. En este caso, interesan especialmente los destinos litorales, es decir, los relacionados de forma genérica con el modelo de sol y playa, localizados en áreas cuya estructura económica depende en buena medida del turismo y que afrontan el reto de adaptarse al escenario que perfilan las nuevas tendencias de la demanda. De hecho, uno de los rasgos que caracterizan la nueva etapa del turismo es el modo en que surgen formas de adaptación a los nuevos patrones de producción y gestión del espacio turístico que tratan de superar inercias y que reflejan enfoques diferentes en la concepción del espacio y el tiempo de ocio y obligan a atender a nuevos factores, tales como la diversificación motivacional de la demanda, los nuevos destinos competidores, o el efecto de la innovación tecnológica en el transporte y la comercialización turística (Anton, Fernández y González, 2008, p. 187).

Desde diferentes enfoques, se viene profundizando en las razones que conducen al declive si bien, como señala Agarwal (2005), los signos del declive constituyen las consecuencias y lo que interesa conocer son sus causas. De este modo, el interés por analizar las repercusiones turísticas, socioeconómicas y ambientales de un supuesto declive o crisis turística, de carácter estructural, en destinos maduros o consolidados y la necesaria adaptación al nuevo escenario turístico, ha sido el eje argumental sobre el que se ha desarrollado el proyecto RENOVESTUR, llevado a cabo entre 2009 y 2011, en el seno del Instituto Universitario de Investigaciones Turísticas de la Universidad de Alicante¹.

Como base del proyecto, se ha prestado especial interés a la trascendencia de los cambios globales y su repercusión en las áreas turísticas, analizando problemas que abarcan desde la necesidad de definir qué se entiende por declive de un destino turístico y su medición, la diferenciación entre crisis coyunturales y verdaderos procesos de declive estructural, la propia validez de la teoría del ciclo de vida del área turística como modelo descriptivo-predictivo, o el papel que desempeñan las estrategias de renovación y recualificación, a través de diferentes instrumentos y herramientas de gestión, a la hora de evitar el declive. Sin olvidar la misma percepción social que, desde el ámbito local, se tiene sobre la evolución del destino y el papel que corresponde a los agentes sociales en estos procesos, ante la necesidad, ampliamente reconocida por agentes públicos y privados, de adelantarse a los efectos negativos que reportaría el descenso de la rentabilidad económica y social de los principales destinos turísticos del país y de sus notables consecuencias en el plano territorial y medioambiental

1. En la misma línea de trabajo se han desarrollado recientes aportaciones, como objeto de seminarios especializados, como la XIII edición del Congreso Internacional de Turismo, Universidad y Empresa, organizado por la Universitat Jaume I de Castellón, centrado en la renovación de destinos consolidados (López Olivares, ed., 2010). O bien como publicaciones específicas referidas a ámbitos regionales que, por razones de su trayectoria turística, justifican el interés por el tema (Hernández Martín y Santana Talavera, 2010).

El presente libro recoge, en parte, los resultados de mayor interés de las investigaciones llevadas a cabo por el equipo del referido proyecto, a las que se añaden otras experiencias, en la misma línea, tanto de España como de destinos localizados en distintos países (México, Brasil, Colombia) y que fueron presentadas en el seminario internacional organizado por el Instituto Universitario de Investigaciones Turísticas, en noviembre de 2011, como colofón del referido proyecto RENOVESTUR.

El propósito no es otro que contribuir a la configuración de un nuevo marco de análisis para la evolución de los destinos turísticos, a partir de una valoración crítica de la teoría del ciclo de vida del área turística y del análisis de diferentes estudios de caso de áreas litorales referidos a la Costa del Sol Occidental, Playa de Palma, Islas Canarias, Costa Daurada, junto con otros destinos litorales mediterráneos, como Benidorm, Benicàssim y Gandía. Las aportaciones se caracterizan por su enfoque, de carácter integral y no exclusivamente sectorial-turístico, de acuerdo con los principios del desarrollo sostenible, y ofrecen la posibilidad de realizar análisis comparado entre destinos turísticos. El texto incluye, además, otras aportaciones referidas a la política turística, desde la vertiente institucional y desde la dimensión empresarial (Exceltur), junto con capítulos que abordan la renovación desde el enfoque de la diversificación del modelo turístico, mediante las actuaciones de valorización de los recursos naturales y del patrimonio cultural.

El objetivo final es contribuir al debate sobre un marco de trabajo conceptual y una metodología de análisis que supere los enfoques meramente descriptivos para aportar herramientas que puedan aplicarse en los destinos litorales consolidados para impulsar las estrategias e instrumentos de intervención en el proceso de renovación de las áreas turísticas.

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I. CICLO DE VIDA DE LOS DESTINOS TURÍSTICOS Y PROCESOS DE RENOVACIÓN

1 Mature tourist destinations: can we recapture and retain the magic?

Richard Butler

1. Introduction

In selecting the title for this paper the choice of words was made with some care as they have specific implications. For example, «mature destinations» was used because most new destinations do not and should not need rejuvenation, so it reasonable to assume the focus should be on those destinations which have been in existence for some time. Second, «recapture» implies that most destinations in decline seem to wish to get back the image they had, or thought they had, in earlier, and presumably better times. To many, perhaps too many, people, older destinations embody past images, often from childhood holidays. The adage that «The past is a foreign country» is very applicable here. Perhaps we need to question whether destinations should be trying to recreate the past for the future or should they be focusing on ensuring there is a future by appropriate interventions that maintain inherent attributes? The use of «retain» is because in an age of sustainability, we have to assume that destinations would wish to take the long term and pro-active view, although this needs to be done for more appropriate reasons than merely nostalgia. Finally, «magic», as the most successful destinations always seem to offer something beyond the norm, and posses attributes that create a highly attractive ambience, and perhaps a magical feel about them.

However, what might appear initially to be a relatively simple task is in reality fraught with difficulty. In many, if not most cases, it is too late or at least extremely difficult, to tackle the problem of decline when it occurs or when it is noticed. Ideally this problem needs to be prevented from happening in the first place, rather than trying to react to the fact after it has appeared. To achieve this requires that efforts are made from the initial development of a destination to avoid the decline of its appeal and its attractions. Ongoing innovation and adaptation are generally better than late stage renovation, a point which will be dealt with later in the paper.

The paper proceeds by discussing the process of development of destinations and the possible causes of their dynamic pattern of development. It then questions what options are open to destinations in a decline stage of their development, and discusses some examples of rejuvenation and the characteristics of their modifications. It concludes with some issues and problems relating to successful rejuvenation or revisioning of destinations and suggests what the overall goals might be.

2. Destination development and change

In studying destinations over the past forty years two key issues come to mind. One is that destinations are dynamic, the second is that they need to be managed. A key aspect of the Tourism Area Life Cycle (TALC) model (1980) was in the subtitle, «Implications for management of resources». Contrary to what has often been suggested, the original model did not argue that all destinations would inevitably decline, as questioned by Plog (1973), but rather, that they were most likely to decline if they were not managed effectively and appropriately. This argument implied that those responsible for the development of destinations should be able to determine what management innovations and modifications needed to be introduced and at what period in the development process they should be activated.

Inertia and Dynamism in Tourism

Tourism is clearly a battleground between two very powerful forces, those of inertia and those of dynamism. The continuous and varying tension between these two agents affecting a destination's process of development is what makes each destination unique. The relationship and balance between these two elements depends on both indogenous and exogenous forces and the way they interact. Inertia in destinations exists partly because it is a common trait amongst most people, reflecting their long held habits tastes and preferences, and their willingness to return to familiar holiday destinations, related to a feeling of comfort and nostalgia. The desire for constancy is present in both tourists and in residents, along with a general dislike of sudden change. As well, both tourist and residents of destinations often have considerable investment, both financial and personal, in specific activities, equipment, facilities and other artefacts related to tourism which keeps them engaging in the same activities often at the same location. Owners of tourism related equipment will wish to use that equipment periodically and there may be limited locations in which this can take place at reasonable costs of time and money. Similarly, owners of facilities such as accommodation enterprises in destinations may be tied financially to continuing to operate such facilities (Coles and Shaw, 2006) thus maintaining part of the infrastructure of a destination beyond what might be expected to be its normal lifespan. Finally, one other aspect of inertia is a common reluctance to spend money, found not only in individuals but also in management and government of destinations, as elsewhere. Overall at the international scale, the global patterns of tourism have changed little, although within that pattern of

apparent stability there has been considerable change in absolute rankings of destinations at a variety of scales (UNWTO, 2009)

On the other hand, there is very considerable dynamism within tourism, although perhaps not as much as less rigorous writings on tourism might claim. There are many changes occurring at the margins of tourism, for example in specific destinations, or in the relative popularity of activities over time. The attitudes of participants are constantly bombarded with messages from the media and businesses to adopt new forms of tourism, new equipment and to visit new destinations. The corporate sector is heavily dependent on not only retaining markets but gaining new market share, thus new products and opportunities are heavily promoted. Thus new destinations have considerable advantage over established ones, and are often publicised in the media simply because they are new. Technological innovation creates many new opportunities, one only has to consider the impact of WWW upon marketing, promotion, and purchasing of holidays and related travel and accommodation to realise this. Economics, particularly economies of scale, favour additional development, offering a greater return on investment because per capita or per unit costs reduce with the increasing scale of purchases. All of these generally exogenous forces are reflected in political actions at higher levels than the specific destination, but can heavily influence the well being and future of individual destinations.

Change in Destinations

As destinations go through their development process they are inevitably subject to change at various rates and with differing consequences. In tourism change is often thought to be uni-directional, that is, more development. It is extremely rare for destinations to try to de-develop, i.e. remove previous development (Dodds, 2007), although modification of existing supply is common. Related to this is the impression that development is often regarded as irreversible because it normally continues as an iterative process, that is, adding to what is already there. Thirdly, development in destinations is often gradual, slow and cumulative, and because of that, the end results are often unintended and unanticipated, as well as unplanned. Small scale additional development may proceed «under the horizon» and its full extent and implications may not be appreciated for some time, and possibly too late for counteracting measures or limitations.

Change of course is implicit in tourism, there can be no benefits (or costs) without change, so change in itself is neutral, it is how it is perceived and handled that can cause problems and undesirable effects. The type and rate of change are sometimes more important than the actual change that occurs. Change in tourism destinations tends to be of two types, evolutionary and revolutionary. Evolutionary change is gradual and consistent, an iterative process building on existing structures, often caused by endogenous forces and is reasonably predictable. Revolutionary change on the other hand, is sudden, variable in nature, often results in the destruction of existing features, tends to be caused by exogenous forces and is generally unpredictable in time, nature or extent.

Evolutionary change is what occurs in most destinations, where each year minor additions and alterations are made to infrastructure, facilities and other attributes, thus maintaining the existing form and function of the destination. This sort of change can continue for decades, as happened in many British resorts from the nineteenth century until well into the twentieth century, often failing to keep pace with market changes during the same period (Shaw and Williams, 1997). Revolutionary change, on the other hand, is what can happen when a destination undergoes generally sudden and unplanned change, often the result of entrepreneurial innovation and investment (Butler and Russell, 2010). Such activity can completely change the nature, focus and physical appearance of a destination as well as the image it projects to potential markets. Atlantic City being converted into a gambling centre in the later 1970s (Stansfield, 1978) is perhaps the most dramatic example, Macau at the turn of the current century is another such development, reflecting change in governmental control as well as radical changes in governance and policies. Other examples include the effect of Walt Disney on central Florida, with the Magic Kingdom radically changing tourism in Florida and the transformation of parts of Queensland into the Gold Coast as a result of the developments begun by Williams (Russell, 2010). Key individuals causing significant change in a destination need not be entrepreneurs as the case of the author Sir Walter Scott and the creation of a new and vastly different image of Scotland in the early nineteenth century (Butler, 1998). It is important to bear in mind that such changes will rarely be viewed in the same light by all involved; to some they may be seen as improvements, by others they may be viewed as being destructive. Much will depend on the individual's situation and involvement or not in tourism as well as their opinions on the agents of change.

Agents of Change

The forces which bring about changes in a destination can be complicated and act in different ways in different situations. The agents of change in a destination experiencing evolutionary change may be quite different to those at work in a destination undergoing revolutionary change. As well, the same agent of change can act in different ways in different destinations. Changes in market tastes and preferences can be both positive and negative to destinations depending what is being offered by each destination. Some may benefit from a shift in tourist preferences from beach holidays to activity holidays for example, while other destinations may be uncompetitive in some areas that are rising in attractiveness to the market. Irrespective of the direction of change, it is of vital importance for those managing destinations to understand the identity and nature of the forces of change which are affecting their locations. Without such understanding there can be little hope of successful intervention and mitigation. As mentioned above, agents of change can be both endogenous and exogenous to a destination, and as Weaver and Oppermann (2000) have pointed out, some factors may be deliberate and some unintentional. The introduction of air services to a destination from a potential market, for example by a budget airline, can have major effects on visitor numbers, and

could be seen as an exogenous/intentional factor, while improvement of tourist facilities within a destination would be endogenous/intentional. Actions such as terrorism generally would be exogenous/unintentional but still with a negative effect on a destination (or more than one destination), while a change in governing political party might be endogenous/unintentional, although this might ultimately result in changes in development policies which would affect tourism. Responses to such agents of change will inevitably vary depending on the nature of the agents themselves, clearly endogenous ones are easier for the destination to modify than exogenous ones which might include such major issues as climate change, global trade policies and international politics.

3. Decline in destinations

Measuring decline

A major issue in discussing declining destinations is understanding what is meant by decline, since this can take a number of forms of varying relevance to specific actors. In general the most common understanding of decline is related to a fall in visitor numbers as this is taken to be symptomatic of a fall in the destination's popularity or appeal. The issue of numbers, however, is not as simple as might be imagined, even when accurate and consistent numbers are available, which is pretty rare. Several years ago Wilkinson (1996) pointed out the fallibility of relying on numbers alone as an indicator of a destination's viability. Numbers were used in the original TALC model (Butler, 1980) as few other acceptable indicators are generally available, but even then it was indicated that they were not a foolproof measure of the health of a destination. The question that needs to be asked relates to what is perceived to be decline in a destination. This leads to further options, as decline could be measured in terms of numbers, in terms of the perceived quality of the destination, of the quality of the visitor experience (perhaps measured in terms of proportions of repeat visitors), a decline in income resulting from tourist expenditure, a decline in investment in tourism related facilities and infrastructure, or a decline in employment in tourism-related services. Clearly all of these items are related to each other, a fall in visitor numbers normally corresponds to a fall in expenditure, and a fall in investment may be reflected in a decline in quality of visitor experience. One difficulty is in deciding which, if any single one, best represents decline, and a second problem is how that factor can be measured. Wilkinson (1996) pointed out clearly how numbers of visitors can remain constant but other measures noted above can be in decline, the classic situation being where overnight visitors decline in number and are replaced by day or cruise ship visitors, thus overall numbers appear stable or even increasing, while tourist expenditure, and employment in accommodation and some other services fall. Thus ideally, a more representative figure than visitor numbers is needed to show the picture accurately, but inevitably alternatives are rarely available and most agencies fall back on what they imagine is total tourist visitation.

Understanding decline

To be able to reverse or mitigate a decline in tourism, however measured, requires some knowledge of the causes of the perceived decline. Dealing with the symptoms rather than the causes of the problem is rarely effective in the long term and more likely than not, simply delays the inevitable (further decline) and may well delay or prevent effective solutions.

One key issue that needs to be resolved is the identification of the triggers of decline and to determine if these are reversible, or at least capable of being prevented from continuing to cause further decline. That presupposes that agreement can be obtained over the triggers and their effects. Assuming this is achievable, then it needs to be determined if such triggers are deliberate or accidental, as in the earlier discussion on agents of change. Triggers that are accidental or incidental to the tourism function of a destination may be mitigated or halted if those driving the triggers can be informed and persuaded of the problems that their actions are causing. Deliberate efforts to cause tourism to decline in a destination are less easily resolved and may require legislation or political change and even then, the result may not be what was expected or desired (see Martin, 2006). Where the triggers are deliberate and relate to rival and competing destinations, alternative actions will be required to make the specific destination better able to compete and overcome such efforts.

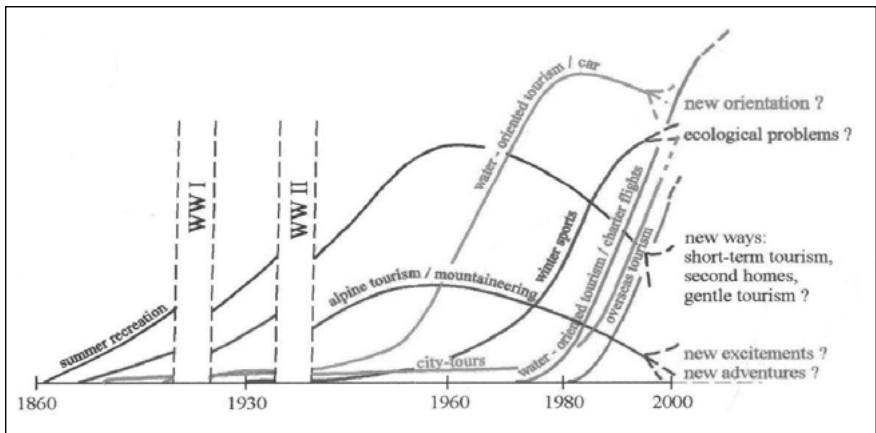
A further issue is whether the triggers are generic in tourism or even wider, or specific to the destination in question. Triggers of decline which are specific to the destination are more able to be successfully overcome by internal agencies and actors, perhaps with external assistance, by engaging in focused actions countering the negative effects. Providing additional and improved facilities and services, improving the overall environment, and improving accessibility, as well as increasing promotion are common responses which often achieve some measure of success. However, what might be called generic triggers and which relate to tourism at a broader scale, such as changes in popularity of activities, desire for new experiences, and innovations in travel and marketing, require industry-wide responses which may need to be taken at a national or even international level and are clearly beyond the scope of a single destination. Action at a national level could include major re-imaging of a country or improvements in national level organisations, such as flag carrying airlines. Perhaps the most serious and difficult to combat are those triggers which are generic to tourism, such as a decline in desire for 3S (sun, sea and sand) holidays which may have implications for tourism throughout a country or even a group of nations that rely on this form of tourism. It is hard to envisage any successful response to such a generic trigger of decline beyond moving out of that specific form of tourism as no country, let alone a destination, is likely to be able to change an industry-wide shift in emphasis.

Supply and Demand: Synchronicity

One of the major symptoms of decline in a destination is a reduced appeal in the market, generally marked by a fall in numbers of visitors. It is essential for destina-

tions to be in tune with their primary markets and when they are not, then problems are likely to arise. This raises the issue of synchronicity between what is supplied by the destination and what is desired by the market(s). If what is being supplied by a destination in terms of facilities, infrastructure and experiences is not what is being sought by the market then the result will be the market moving to other destinations. The TALC «curve» is in fact an amalgamation of several such curves, in the case of accommodation for example, one would expect different curves reflecting different stages of development for the hotel, guest house, private home and second home segments of the accommodation offerings. In a similar way, there are many such curves representing tourist activities, some increasing in popularity, some declining, and a destination which is primarily offering activities which are generally declining in their popularity will be facing or will shortly face problems in terms of attracting tourists. Zimmermann's application of the product life cycle concept to tourism activities or products illustrates this aspect clearly (Figure 1).

Figure 1: European Tourism Products: A Product Life Cycle Approach



Fuente: Zimmermann 2000: 234

Reasons for Decline

There are probably as many reasons for a decline in tourism as there are destinations, each place represents a unique situation reflecting its geography (location, morphology, environment), its social composition (resident population and visitor population), its accessibility, and its visibility to name only a few variables. However, from the literature in general on destinations, it is possible to identify some of the major causes of decline. In the first case, attributes are no longer attractive to market as changes in market tastes and characteristics require different attributes. Second competing destinations become more attractive, in some cases because of transportation innovations changing accessibility. Disasters and catastrophes can have specific negative effects and may be met by inertia and reluctance to change

facilities and services. Misguided or inappropriate policies and planning and failure to implement plans and policies can also reduce the success of a destination, often resulting from lack of agreement between the public and private sectors. Finally a failure to deal with a negative media image can be fatal to a destination's continued success.

Some of the above causes reflect changes which may have taken place over a considerable time such as the fact that assets are no longer attractive to the market, while others may be a sudden occurrence such as disasters. In general many, if not all, of the causes are inter-related to some degree. Clearly inertia and uncompetitive assets generally work in combination, and unfavourable media image may be a combination of a disaster and gradual changes in market characteristics and tastes. Failures in planning, policy and implementation are not uncommon, and often it is more the last of these elements, failure to implement policies, which prevent adjustment and competitive change (Butler and Dodds, 2009). Many countries and destinations have appropriate policies and planning frameworks but fail to implement these, allowing development to occur with no overall direction or goal, or perhaps worse, deter development from taking place.

4. Possible responses to decline

The nature of necessary responses to any or all of the factors in Figure 1 depends on the unique characteristics of each destination, but realistically there are relatively few options available that destination managers and politicians can take. The first, and a common first response, is to do nothing. This is often followed by attempts to find new or additional markets. An alternative is to modify part or all of the offerings of a destination, possibly in combination with changing its image. Another response is to attempt to reorient offerings to cater to specific niche markets, while the final option is to leave tourism completely.

Many destinations either by choice or necessity may do little or nothing differently when facing a decline in tourism. Some may not have the financial ability to make significant changes in infrastructure, services and promotion, others may lack the leadership or powers to do so. Some destinations persist with the status quo in the belief that things will change and their visitor numbers will cease to decline and will return to earlier higher levels. Inertia, wishful thinking and an unwillingness to accept that a destination is less appealing than it used to be are common reactions to declining numbers of visitors. Finding a new or additional market is not an easy task but in some situations has taken place more by exogenous fortune than deliberate intent. The end of the Cold War, fall of the Berlin Wall, and Perestroika have allowed Eastern Europeans to travel freely after many years of restrictions (Butler and Suntikul, 2010) and this resulted in a new market appearing which some western European, particularly Mediterranean and Adriatic destinations have managed to attract. It has not been necessary to make major changes or massive investments to attract a part of this market to established and well known tourist destinations, giving them a rebirth while offering the same attractions and experiences as before. Where markets have been long established,

for example in the case of the militarily related British market to Malta and Cyprus, it has taken much longer to be able to attract new market segments, such as from Germany and other northern European countries, but over the long term this has been successful in both those destinations.

Modifying part or all of the offerings at a destination can attract a new market or attract back a disappearing market, but a major difficulty is changing the image of a destination to match the new offerings. This aspect is discussed further below. Many destinations have tried this approach, in the last decade or so in particular such a policy has often been in conjunction with claims of «becoming more sustainable» and «going up market». The appeal of sustainability has become increasingly attractive to destinations since it is in line with many national government stated policies, if not actions, and is also seen as attractive in a general way to the public at large. There is however, very little evidence that claims to be sustainable or more sustainable do attract more visitors. While sustainable tourism is a praiseworthy concept, it is a flawed concept in most applications, with the travel component if not others, generally being ignored. As well, there is no convincing evidence that the majority of customers will choose a sustainable destination despite surveys claiming this. Thus «going green» may well be an appropriate and admirable path to take, it is unlikely to restore the declining market, certainly not in terms of increasing numbers. Perhaps in recognition of this, many destinations' promotional materials also overtly or implicitly indicate the destination is also going «up market». One might be forgiven for thinking that the upper end of the market might favour sustainable destinations over old declining destinations, but whether such a segment of the market is in reality any more sustainable is highly unlikely. Up market tourists tend to want upmarket facilities and services, which while resulting in higher per capita expenditure, which is highly attractive to destinations, also consume resources such as energy and water at higher levels than mass tourists, and thus can be less sustainable on a per capita basis. The unfortunate reality is that there are too few upmarket tourists to keep all declining resorts in business, even if they could be persuaded to visit those destinations. Thus this action might be successful in a limited number of cases but cannot be so for the majority. One has to admit however, that it would be beneficial in many respects if all destinations did become more sustainable, irrespective if this attracted a new market segment or not.

Drastically changing an image and associated offerings is not done easily and can require massive investment, major political effort, community support and an element of luck and timing. The most spectacular example of drastic change is that of Atlantic City in the United States, which, through the adoption of legalised gambling and the attraction of casinos, saw massive increases in tourist numbers, tourist expenditure, employment in tourism, property development and transportation improvements (Stansfield, 2006). Despite these massive changes and upturn in visitor numbers, Atlantic City did not rejuvenate itself as a family beach oriented tourist destination. It became a casino dominated destination and elements still associated with the summer beach function remained in decline. Macau, which now has the largest expenditure on gambling of any location worldwide, saw a similar

pattern of development and growth, in that case also through legislation aimed at changing the way gambling was operated and opening up Macau to the global gambling industry. Rather than radically changing the attraction, Macau radically changed the manner of operation of the main attraction (McCartney, 2010).

A number of destination combine a number of the actions noted above in trying to appeal to one or more niche markets, such as ecotourists, literary tourists, extreme sports tourists and others in the long list of supposedly different forms of tourism. In reality many of these niche markets are not new, they have existed for many years but generally on a very small scale that made them not viable as alternative markets. As tourism has grown enormously in the past few decades, many of these small specialised markets have grown to a size which makes them economically viable and eminently worth attracting. Destinations specialising in activities such as weddings, festivals, and specific sporting participation such as golf have now begun to see such focused tourism as a reasonable alternative to the generic tourist market. A final option is to do as Baum (1998) has suggested, which is to leave tourism completely, an option which has not proved popular in many cases, and which would not achieve the goal indicated in the title of this paper.

5. Key considerations

To successfully halt or reverse decline requires detailed considerations of several key issues. Short term immediate responses are rarely successful in dealing with underlying problems, although they may relieve some of the symptoms briefly. To tackle systemic long term decline requires careful planning, specific knowledge and understanding, appropriate policies and effective implementation of those policies.

Outcomes

Before any successful action is taken it is necessary to define and obtain agreement on intended and desired outcomes. There needs to be agreement within the community involved over what outcomes are wanted and needed from actions taken to halt decline (this is assuming that there has been agreement that there is decline and that actions need to be taken, which is not always the case). Authorities need to know if the key outcome is to be a simple increase in total tourist numbers, i.e. reversing a declining trend, or whether, for example, it is an increase in staying visitors that is desired. Irrespective, it is necessary to decide whether to try to attract a higher proportion of repeat visitors or target new markets. Another issue would be whether the goal should be an increase in numbers from the traditional market or if an up market or green market is a viable and acceptable alternative.

An alternative outcome is to make the destination more competitive, partly on the assumption that if it becomes more competitive, then visitor numbers will start increasing. Becoming, or claiming to be becoming, sustainable has already been mentioned, but in reality such a step is far more complex than improving the physical appearance of the destination by increasing green space, reducing waste and reusing water in the tourist facilities and services. Sustainability is a holistic

concept and should involve the whole community which can require radical re-adjustment in the way of life of all citizens which may not be acceptable to all. Another desired outcome may simply be a greater expenditure by tourists, either on a per capita basis (going upmarket) or in total (e.g. from more tourists). How increased expenditure is achieved is as or more important than any increase itself as different approaches to this desired outcome can require significantly different actions. Finally, almost inevitably development and redevelopment will be required in a destination if tourism there is to be significantly changed, and one outcome of this, desired or not, will be changes in the physical structure and morphology of the destination. Such changes are not always desired, especially if they involve the removal or major modification of landmark structures.

Outcome Achievement

The likelihood of a destination achieving any or all of its desired outcomes from initiatives is dependent on a number of factors. One is whether that destination has a good record of implementing previous policy initiatives or whether most are announced but not acted upon. As noted above, many plans are never implemented for a variety of reasons and past record can be a good indicator of the probability of desired outcomes being achieved. A second issue is whether initiatives have been integrated with each other and where appropriate, with other actions being taken, perhaps not directly related to tourism, by the destination managers. One of the key elements of sustainable development is the holistic viewpoint, whereby it is recognised that all elements are inter-related and that the best chance of success is through symbiosis, where the sum of all outcomes is greater than the sum of the parts. Almost as important is the question of community and industry support. Without community support many initiatives are bound to fail, particularly in those cases where active community involvement is an important element. In the same vein, if the local tourism industry is not behind actions, it is unlikely that many planned outcomes will be successful.

No destination is likely to want to have to revision itself or rejuvenate its offerings on a frequent basis, thus long term actions are more likely to lead to successful implementation and outcomes being reached than short term ones which need to be revisited constantly. Local residents are unlikely to want to support perpetual change and disturbance. Finally, in many cases success will only be achieved if the initiatives result in the desired change in image. This requires not only implementation of plans and policies but a simultaneous effort in marketing and promotion to ensure that potential visitors and the travel intermediaries are aware of the restructuring and revisioning that is going on. If the market is not aware of changes being made in the destination, visitors are not likely to return and decline may continue unabated.

Competition

All destinations face competition and over the decades this has become more severe and more widespread. New destinations appear each year with the automatic

advantage gained from being new and able to take advantage of the latest technology and designs. It is important for those in charge of a destination to be aware of what are their current and future competitors. It is not enough to think only of places which have been competitors in the past as tourism is dynamic in nature and tastes and opportunities are constantly changing. When it is possible to reach anywhere in the world within a day or little more, destination managers should consider any location with similar offerings at least as competitors, and in reality accept that even destinations offering significantly different opportunities might also be competitors.

When undertaking change therefore, it has to be considered if the changes proposed will be effective in making the destination more competitive, and competitive enough to be able to regain and retain the market share it has lost. Thus not only must its relative competitiveness be taken into account, its specific and absolute appeal must be enhanced by any initiatives. Becoming slightly better at what it has always offered is rarely a successful outcome. More likely than not, a destination needs to not only become more successful in its traditional area but ideally become competitive in additional areas also. It will need to not only become more successful in its traditional market but become appealing in different markets, whether niche or mainstream (mass) if it is to really be rejuvenated. As well, the changes need to be effective over a long period of time, as a short term rise followed by another decline is likely to leave a destination in a worse position than it was before action was taken, perhaps with an image of having failed again.

Image

The image of a destination is as important as the reality of that destination. It has long been known (Hunt, 1975) that the nature of the image of a destination is key to that location being successful or not. Image is what concerns potential visitors, particularly first time visitors who have no personal experience of what a destination is really like and how well it fits their tastes and preferences. Destinations are therefore very much at the mercy of those promoting places, even more so in the case of destinations highly dependent on tour operators and travel intermediaries for custom. Positive images can be easily destroyed very quickly in a number of ways, although factors such as disasters and accidents, even wars, can be overcome in a relatively short time (Butler and Suntikul, 2012). Re-occurring negative events, such as a series of terrorist acts, especially where tourists are involved either as targets or involved bystanders, can have much longer term negative effects on a destination and may be sufficient to cause it to enter decline. In such cases actions taken in response will have to be major and visible enough to persuade potential tourists that the problem has been overcome and is not likely to happen again.

Most troubling, perhaps, is an image of decline, that a destination is «over the hill», «past it» and no longer «cool». Once a destination goes out of fashion, it is extremely difficult to persuade the market that it has become an attractive and desirable place to visit again. There are many competitors chasing the same mar-

ket, and unless a destination has a truly unique selling point, tourists can always find an acceptable alternative. To persuade them to return to somewhere which has become unattractive is a difficult, often insurmountable task. Major cities of the world such as London, Paris, New York or Hong Kong are able to continue to attract tourists despite setbacks such as «9/11», the London bombings of 2007 and a SARS outbreak. However destinations which offer sun, sand and sea are extremely common and when they are faced with a negative image and strong competition, the chances of winning back market share is extremely unlikely. Some indications of the nature of such a problem and possible solutions were outlined and discussed in the context of the Gold Coast in Queensland, Australia (Faulkner, 2003; Faulkner and Tideswell, 2006). One difficulty encountered in such revisioning exercises is the often reluctance of the tourism industry there to accept that there are problems which need significant changes to be overcome.

Market Change

Successfully attracting a new market is difficult as most mature destinations have an established image which appeals to some market segments and not to others, and thus an exercise becomes one of changing image as well as shifting markets. Those responsible for promoting and marketing destinations have to determine a number of issues before proceeding, including whether the destination is to shift from a primarily domestic market to an international one or vice versa. The British coastal resorts, except perhaps for Brighton, have virtually no image at the international scale (Walton, 2012) and their market has always been a domestic one. To make such destinations attractive to an international market would be extremely difficult as their attractions generally pale beside those of their competitors, particularly when the weather is taken into account. A number of destinations globally have successfully made such a switch, however, Puerto Vallarta on the Mexican Pacific coast is one example. This resort was attractive to the Mexican upper classes, increasing in popularity as road access was significantly improved but then entered the international scene through a combination of publicity (Elizabeth Taylor and Richard Burton making headlines there during the filming of *Night of the Iguana*, followed by the resort's success in being one of the ports served by American Cruise Lines (including *The Love Boat* a popular American television programme) and improved air services and promotion by the Mexican authorities. In other cases, Sitges in Spain and Brighton in England for example, gaining a reputation for being attractive to a niche element such as the gay segment have seen a successful broadening of appeal with a new market.

Many mature destinations have established particular perceptions in the market as family resorts, catering particularly for families with children, and generally it is not as difficult to go from that market segment to a wider element of the tourist market, it appears much more difficult to retain or gain the family segment when a destination has a strong image in other areas, such as the youth party element in for example, Falaraki, Aya Napa and Ibiza, which may not seem compatible with families and their preferences. Las Vegas was not particularly successful in

attempting to broaden its market appeal to families as it did at the end of the 20th century. Appealing to the mature age segment also appears to be somewhat easier than moving out of that segment. The cruise segment of tourism (mobile destinations perhaps) has been the most successful at enlarging its market share of tourism in general and in the elderly market in particular but few destinations have been able to transfer from catering primarily to the elderly to appealing to a youth market for example.

Many mature destinations began their lives relying on the mass market transported by rail, particularly in western Europe and North America. As railway companies often became heavily involved in the development of those destinations, a captive market became established as visitors were generally dependent on the populations served by the particular railway companies. As many rail systems became owned by national governments and thus served the population at large, this captive market disappeared. However, inertia and the lack of desire for change has meant that some resorts have maintained their appeal to specific regional populations. Blackpool, the largest British resort which attracts close to ten million visitors a year, still has a strong appeal in northwest England and central Scotland, its original base market. Changing the spatial origins of a large proportion of its market can be appealing to a destination if a new affluent market emerges elsewhere or its original source of visitors is declining in numbers and spending power for example. As noted earlier, the appearance of potential tourists from eastern Europe has enabled some resorts to make such a change. Another approach emerges as a possible when there are significant improvements in accessibility, perhaps due to innovations in transport and transport services. The opening of new routes by budget airlines is probably the best example of such innovations, and explains in part why some destinations are willing to subsidise such airlines' operations at their airports in order to tap into a new market. There is of course, the risk of vulnerability and the loss of much of that market should the airlines decide to cancel particular routes or insist on unacceptable benefits and payments to continue operating.

The issue of «gong up-market» has already been discussed and while appearing admirable and financially appealing, this action can require very considerable investment in infrastructure, services, facilities and promotion to be successful. As with so many elements in this discussion, this step also involves a successful change of image to make the destination appear worthy of interest from those with the widest possible choice, the rich allocentrics of Plog's (1973) model. The harsh reality is that there are not sufficient numbers in this much desired segment to be able to meet the wishes of so many destinations, so attempting to attract this segment demands something more than the usual attributes. Simply having the «biggest» or most expensive, or most absurd attribute is not necessarily enough to attract this market segment, which is often used to such extravagance, and it is inevitable that if a new and larger facility is created, then some time in the future an even larger attraction will be built elsewhere and the basis of the attraction will have been superseded. Plans to build the largest casino in the world in Miami (Godard, 2011) will inevitably result in the decision for somewhere to build an

even larger one, just as Macau has overtaken Las Vegas as the major casino gambling destination in the world.

Changing from a mass market, which is the one most commonly found in mature destinations, to a niche market is dependent upon a niche market being available and large enough to compensate for potentially losing large numbers of visitors. This has become more possible as tourism has expanded in volume very considerably over the past fifty years or so, and what were niche markets, while perhaps not gaining in market share on a relative basis, now represent a market large enough to be worth soliciting. The ecotourism market is a good example, where ecotourists, although not under that name, have existed for many decades, but not in sufficient numbers until relatively recently to attract attention. Such a shift would also be dependent upon a destination having attributes which would appeal to that niche. Somewhat similarly, adding or shifting to a different peak season is an avenue which has also been pursued. One example is the Speyside region in highland Scotland, where in the 1960s a small group of local entrepreneurs invested in a ski lift and began offering winter accommodation for downhill skiers. Aviemore, at that time had a mature seasonal (summer) tourism market of mostly elderly tourists interesting in scenery and nature, in history and heritage, in walking, fishing, and stalking. The advent of winter sports added a new element to tourism, never as large as the summer market, but of sufficient size to enable facilities such as hotels to keep their employees on throughout the year and other facilities such as ski schools to become viable. While some outside investment was not universally accepted and some of the summer market lost, a new element of younger, family groups have appeared and the region has been rejuvenated through a combination of gaining a new market segment, adding a new season of operation, and changing a specific and rather narrow image to a much broader one.

Finally there is the possibility of regaining the traditional and declining market. In many ways this is an easier and more feasible solution since it can involve less fundamental change than many of the other options discussed above. It is essentially making the destination more competitive to its original market segment, and this can involve as little as revisioning and presenting a new face to the market while retaining the visibility which it already possessed, to adding a large number of additional attractions and services. Name recognition can be maintained albeit with a slightly amended message, namely that the destination is still in business and now more capable of offering a satisfactory experience. Regeneration of Benidorm is a good example, where the original attributes of climate, beaches, accessibility and general ambience have been renovated and improved through carefully planned private and public investment and support.

6. Conclusions

Mitigating and reversing a decline in tourism, however measured, at a destination is a complex and difficult task. Not only is it necessary to gain support for any initiatives from both public and private sectors, but also from local residents and above all from potential tourists. Decline is clearly a situation which would be

much better avoided but for many mature destinations appears almost unavoidable. The process, as in the human life cycle, begins at birth, and destinations would have a much better chance of avoiding decline and retaining a viable (and sustainable in their context) tourism industry if appropriate decisions were made early in the development of the destination on a pro-active basis rather than late in the cycle generally in a re-active mode. Destinations which concentrate on developing a market, maintaining it and then in decline trying to recover that market are, in essence, perpetually playing «catch-up», and are in a position of reacting to market changes. They would be in a much stronger position had they concentrated on developing long term appeal, maintaining that appeal in which case they would not be unattractive or face a decline stage in their life cycle.

Much of this also depends on the image generated. As discussed above, image is of critical importance and relies heavily on the media, increasingly so in the present day where all forms of media, from conventional to social, play a major role in how a destination is seen by potential visitors. One needs to consider if the image held of a destination is specific to that destination or to the region or even the country in which it is located, because it is necessary to evaluate if a change in image of a destination would be enough to overcome a negative image about the context and area in which that destination lies. A destination also has to consider carefully what image it has of itself and what image of itself it wishes to project to the market. In some cases the two images can be quite different and a «false» or non-credible image is likely to fail even if it is, in itself, quite attractive. It has to appear real and appropriate to succeed. The media can create interest in a destination, stimulate already existing interest or reduce interest in a destination, depending on how newsworthy the destination and its image are. A problem is that the media is generally uncontrollable by a destination, but it is capable of manipulation. It has potential immense coverage, but that is often unpredictable, and is always vulnerable to the issue - attention cycle that cause a destination to disappear from a newsworthy status to anonymity very quickly. Using any form of media to create or change an image is, therefore, fraught with risk and the outcome may be uncertain and at odds with what is desired.

Despite all the research that has been done on destinations they still seem to follow the same general development/decline pattern, except that now this tends to happen more quickly and at all scales. Creating a new image is more than sending out news releases claiming a destination has changed. It is convincing others to say a destination has changed, what others may say is not necessarily what is desired to be said. There has to be convincing evidence of the changes and their effects beyond stating what will happen in the future. Implementation must take place rather than mere wishful thinking. Successful rejuvenation of a destination requires more than simply investment, which may be sufficient for a specific business. There is a difference between the rejuvenation of an individual tourist enterprise and tourism in general at a destination. Individual enterprises can be rejuvenated successfully, especially where there is a single controlling element and clear goals and motivation. It is much more difficult for tourism as a whole to do so, primarily because of the often conflicting goals and scales of operation, and the response of community

residents, which may not be uniform. Conservation (not necessarily preservation) of the environment (attributes of all forms), adjustment to market changes (but not chasing these blindly regardless of their suitability for the destination), enhancing the quality of life for residents and visitors, and sensitivity to local residents and the community as a whole are all essential factors to be considered in rejuvenation and refocusing of a declining destination, if it is to have a chance to regain its former popularity to tourists.

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El presente texto recoge distintos trabajos y reflexiones sobre los procesos de renovación experimentados por destinos y áreas turísticas, en el ámbito nacional e internacional, a la vez que muestra la complejidad e importancia del tema objeto de estudio, en consonancia con las profundas transformaciones que está experimentando el mercado turístico. Por encima de reduccionismos y enfoques estrictamente sectoriales, desde un planteamiento integral de los destinos turísticos, la madurez del espacio turístico representa el punto de partida del apasionante discurso planteado por el profesor Richard Butler, que enfatiza la necesidad de adoptar enfoques proactivos, con carácter preventivo, para evitar el declive. A partir del marco doctrinal relativo a las teorías sobre el ciclo de vida de los destinos turísticos, los autores han adoptado una visión crítica de las diferentes vertientes de la renovación de destinos, para llegar a una sistematización de experiencias basadas en estrategias y políticas, con aplicación de distintas herramientas e instrumentos. El análisis de los proyectos de renovación y los procesos acometidos muestran escenarios complejos mientras que el análisis de experiencias pone también de manifiesto la necesidad de afrontar la renovación desde un enfoque holístico del destino turístico.

