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Europe at the Seaside
The Economic History of Mass Tourism in the Mediterranean

Edited by
Luciano Segreto, Carles Manera, and
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Foreword

The original idea for an economic history of mass tourism in the Mediterranean came from Professor Carlos Manera and Professor Luciano Segreto. The time seemed ripe for an exploration into what has become the world’s biggest industry – the tourism industry. A conference was organized at the University of Mallorca with contributions from leading academics in the field of European tourism and mass travel. The results of this conference have now been collated in this volume to be published together for the first time. The book is ultimately intended to constitute the definitive guide to the academic study of tourism in this field.

The ICCA would like to thank all participating authors as well as all those who contributed toward the realization of this project – in particular, Contessa Roberts as well as Sonja Haxel, Sandra Cabboi, and Nicola McClellan. We greatly appreciate your time and commitment. We would also like to thank all those involved, both our members and our partners, who have helped or supported the publication of this book. We would especially like to thank the University of Mallorca, whose steadfast support of this project has made this publication possible.

We trust that you will find Europe at the Seaside a useful reference guide and welcome your feedback at n.tolhurst@cca-institute.org.

May 2009
Frankfurt am Main

ICCA Editorial Board
Introduction

The Mediterranean as a Tourist Destination

Past, Present, and Future of the First Mass Tourism Resort Area

Carles Manera, Luciano Segreto, and Manfred Pohl

The history of tourism has become an increasingly popular research topic in recent years as books on tourism and especially its importance in shaping modern societies have gained wider interest among both academics and the wider reading public. Whereas early research naturally dealt with the fascinating, but also rather elitist, eighteenth-century concept of the “Grand Tour,” and those tours that followed in the nineteenth century, recent studies in tourism have moved to the history of mass tourism, a phenomenon deeply rooted in the twentieth century and the “era of the masses” and democratic society. The beginnings of mass tourism can be found in the first appearance of seaside resorts in France and England, a process linked with the development of public transport systems and efficient (and cheap) railway networks, which linked the industrial towns and capitals to the beaches. Economic development and new industrial relations, as well as new types of contract for manual and white-collar workers, which included holidays, encouraged the growth of this process in the early years of the twentieth century. However, other more socio-cultural factors, such as new attitudes toward and increased interest in sport and fitness, played a decisive role in encouraging more people to use their vacations as a time to discover the seaside and to relax and enjoy the sunshine and all the other amenities of seaside resorts.

Notes for this section begin on page 9.
Recent years have seen a mushrooming of research into the history of tourism conducted by social, cultural, and economic historians, sociologists, economists, and environmental scholars. In 2003 the International Commission for History of Travel and Tourism was established, which has enabled the exchange of ideas on related topics by means of “H-Travel,” a network for the academic discussion of the history of travel and tourism.

Most books on the history of tourism agree on the leading role of the Mediterranean area as the first mass tourism destination area. Today this region is made up of twenty-two countries, whose common characteristic is their border with the Mare Nostrum. Nevertheless, given this historical reality, surprisingly few studies have been made of the Mediterranean region as a whole as a tourist destination, although separate analyses have been made of its sun and sand destinations. This absence of general studies of an area of such crucial importance in terms of economics of tourism can perhaps be explained by the lack of statistics. The aim of this book is to fill this gap by introducing readers to the history of mass tourism in the Mediterranean region over the last fifty years. This collection of essays, originally presented in February 2003 at the Palma de Mallorca conference on The Economic History of Mass Tourism in the Mediterranean after World War II, aims to offer a better understanding of the region’s general economic and social networks involved in this phenomenon over the last fifty years; to examine the most popular tourist destinations, with special attention to the north Mediterranean coast; and to highlight some of the crucial actors in the process of development, such as hotel entrepreneurs, companies developing a network of seaside resorts, travel agencies, charter companies, and so on. This project has been the result of a long-term scientific and cultural cooperation between the University of the Balearic Islands and the University of Florence, with the organizational and scientific support of the Institute for Corporate Culture Affairs (ICCA), a leading international institution, well known for its dissemination of research into business history and business culture among both the academic and business communities. The project is also grateful for the generous support of the Government of the Balearic Islands.

The Macroeconomic Image of the Mediterranean Area: A Changing Kaleidoscopic World

Few areas of the world have changed so much over the centuries as the Mediterranean. Throughout its history, its population growth has fluctuated, with an uneven distribution that has depended on the prevailing subsistence model adopted by its inhabitants at given moments in history. Nonetheless, with the
passing of the centuries the population has greatly increased, leading to the creation of a strong network of cities stretching from the coast to the remotest corners in far-flung valleys and mountains. Given the Mediterranean’s fragmented geography, different cultural groups have emerged. For millennia, these cultures have taken advantage of the relative ease of maritime communication, leading to the creation of a common fund of cultural, religious, and symbolic elements, and shared behavior patterns in relation to the environment. Through agricultural activities and livestock farming in areas that were barely suitable for human occupation (given the lack of water resources, shallow soil prone to erosion by torrential rain, and the predominance of slow-growing vegetation), a fragile balance was maintained between man and nature that lasted for centuries. This balance is now being threatened by the unprecedented urban growth of the last four decades.

At the beginning of the 1880s, no Mediterranean city’s population reached one million inhabitants. Istanbul, which was the capital of the Ottoman Empire, was closest with 875,000 inhabitants, followed by Naples (475,000), Madrid (400,000), Lisbon (300,000), Rome (275,000), and Barcelona (250,000). Just over a century later, fourteen cities in the Mediterranean have over one million inhabitants, one-third of the world’s tourists come to the region (about 228 million tourists visit the Mediterranean coast annually) and, in the countries that border its shores, over 4,500 sq. km are occupied by tourist accommodation facilities and associated infrastructure. These figures highlight the incredible development that has occurred in the Mediterranean in a relatively short space of time, because the phenomenon only dates back to the tourist boom of the 1950s.

Initially, cities grew by expanding into areas that adjoined the existing early twentieth-century nuclei, which had been created by industrial development. But during the post-war European reconstruction, including the increased income of the European population, the massive use of individual means of transport (which dramatically changed the population’s mobility patterns), and the social organization of work (with paid holidays and increased leisure time), transformed the concept of rest into a new activity, as well as generating a different type of urban development. New coastal and inland areas were colonized as the industrial economies of Europe grew due to domestic migration. At first, this led to isolated building developments, scattered here and there, comprising separate dwellings, second homes, and tourist or hotel complexes. Over the years though, these areas have become denser, forming the tourist resorts, particularly along the coast. This process, which was first identified in the late nineteenth century in Liguria (the Riviera), in Provence, and especially in the Côte d’Azur, speeded up in the 1950s, with mass tourism initially making an appearance on the Catalan coast (the Costa Brava).
and later in Greece and the Balearics (Mallorca), before extending along the Spanish Mediterranean coast, the Italian Adriatic, and finally some areas of northern Africa (Tunisia, Morocco).

It is nothing new to say that the Mediterranean Basin is the world’s leading tourist destinations. The figures say it all. With revenue from tourism of US$134 billion a year (28 percent of the world’s tourist expenditure), a large part of the economic activity of the Mediterranean region is based on tourism services, with important repercussions: annually, tourism expenditure in these countries accounts for about 3.7 percent of the GDP (data for 2002). There can be little debate, however, about the variety of tourism. From traditional sun and sand destinations (Spain, Turkey, and Tunisia) to those with a high cultural and heritage-based (France and Italy, but above all Greece), the coastlines that are mainly visited for vacation or leisure purposes, even if other incentives are gradually gaining ground, such as health tourism or travel for professional or business purposes, thereby helping to diversify destinations and customer profiles. Europeans are the most frequent visitors (accounting for 9 out of every 10 tourists), with the Americans lagging far behind (less than 5 percent of all travelers). More recently, a boom in tourism from the Middle East and Southeast Asia has been detected, with a market share that doubled between 1987 and 2002. The strength of this historic sea’s tourist industry cannot be denied. Today, the Mediterranean offers a total of seven million tourist beds in accommodation centers mainly concentrated in France, Spain, and Italy (which have two out of every three beds). Despite this remarkable vigor, a number of factors seem to indicate changes for the future.

As an international tourist destination, the Mediterranean is without doubt starting to lose ground. Although the number of visitors to the Mediterranean grew from 130 million in 1987 to 228 million in 2002 (an increase of 76 percent), it is also equally true that the area’s market share has been falling. In fact, over the same period of time, the global number of tourists throughout the world rose by 95 percent. In other words, although in 1987 36 percent of all recorded tourists chose the Mediterranean as a destination, this proportion had dropped to 32 percent by 2002. The most crucial variable is also of concern: tourist expenditure in the Mediterranean has remained stable, with a slight downward trend. At the same time, there has been a change in the composition of tourism issuing markets to the Mediterranean. Tourism from traditional issuing markets (Europe and America) has slowed, given the almost stagnant trend in international tourist travel, and the market share of both has fallen in comparison with new Middle Eastern and Southeast Asian markets. Within the context of rising tourist numbers – up by 95 percent – European and American visitors to the Mediterranean rose by 37 percent and 22 percent respectively, whereas visitors from the Middle East and Southeast Asia went
Introduction: The Mediterranean as a Tourist Destination

up by 136 percent and 115 percent, respectively. This indicates the existence of potential new customers.8

A change can also be observed in European tourists’ choice of destination. European tourists, the Mediterranean’s main market, are tending to opt for different Mediterranean tourist centers from the resorts that spearheaded the process of tourism development in France, Spain, and Italy. In the span of just a few years, the number of European visitors to other countries in the Mediterranean has doubled: 23 million tourists visited other nations in 1987; by 2002 the figure had gone up to 47 million. A clear change in their choice of tourist destination is evident, as in 2002 the Mediterranean received 98 million more tourists than in 1987. France, Spain, and Italy accounted for a large part of these new customers (69 million), but they were also shared by Turkey, Greece, Egypt, and Tunisia. As a result, the three leaders experienced a slight drop in their market share, falling from 77 percent of all tourists to the Mediterranean (1987) to 74 percent (2002). These figures affect another key vector – investment – as a slower rise in the number of tourist beds in traditional destinations can be observed as opposed to a clear rise in emerging destinations. The slower growth of the three big traditional destinations (France, Spain, and Italy) has been reflected by private investment in fixed tourism assets. Throughout the Mediterranean region, there has been an increase in tourist accommodation (measured in terms of tourist beds) of 1.8 million new beds (a growth of 37 percent). However, while in France, Spain, and Italy accommodation rose by only 22 percent, in other Mediterranean countries there was an 81 percent rise.

Mass tourism is gaining in importance from a macroeconomic perspective, but its heavy environmental impact is also on the increase. In 1987, tourist expenditure accounted for 2.2 percent of the GDP, rising to 3.7 percent by 2002 (an increase of 67 percent). This aggregate figure is highly significant, but a breakdown can be even more revealing. In 1987, only seven countries in the Mediterranean had a level of tourist expenditure that accounted for over 5 percent of their respective incomes. In 2002, there were twelve countries in this position. In fact, in the case of Albania, Algeria, Bosnia-Herzegovina, Syria, and Croatia, the impact of tourist expenditure on their GDPs has risen dramatically. In contrast, France, Spain, and Italy have experienced more moderate growth. The same trend is repeated for tourism’s environmental externalities, which have gradually extended along the Mediterranean coast. Between 1987 and 2002, the number of tourist stays per sq. km of land doubled. As a result, twelve Mediterranean countries now exceed the average Mediterranean figure of 158 tourist stays. This variable clearly indicates that some areas have reached their saturation point. The real estate sector and, above all, the building industry have benefited from the urgent need for new infrastructure, with relatively rapid recovery of the initial investment.9
Old and New Actors for a Successful Story

The macroeconomic approach does not explain everything. The tangible success of any area in the Mediterranean Basin has been the result of a series of variables and the interaction of multiple actors, such as entrepreneurs, hotel groups, international travel agencies, specialized and non-specialized workers, local, regional, and national governments. The approach proposed in the chapters that follow takes into account all the possible variables to be considered in this context. The chapters include national studies on Greece (by Margarita Dritsas) and Portugal (by Benedita Câmara); individual geographic area studies, which have been the most successful in mass tourism in recent years, such as the Costa del Sol, whose development is studied by Carmelo Pellejero Martínez, and the Balearic Islands in Spain presented by Carles Manera and Jaume Garau-Taberner; contributions by Philippe Mioche on the French Riviera, and by Patrizia Battilani on Rimini, the most famous tourism area in Italy on the Adriatic coast, which are considered to be the first places to experience the arrival of the tourist industry.

Other chapters deal with individual business actors. Peter Lyth presents a study on the airline companies that started the charter system, which is so crucial for mass tourism; Ellen Furlough analyzes what is probably the most famous tourism group, the Club Méditerranée, and Hubert Bonin investigates a French group, Accor, and its traditional difficulties in shifting from the business customer sector to tourism. Family firms are the core of two other contributions, highlighting Majorcan hotel entrepreneurs (Antoni Serra) and the leading Italian group Alpitour (Luciano Segreto).

The different case studies make it clear that tourism does not differ markedly from other economic sectors. Each nation’s “imprint” is quite evident and throws light on new aspects of the discussion about the differences in the history of economic development in Europe. Entrepreneurial capabilities and styles emerge as key factors in understanding – more than the success of a single country or a single area (which in part has to do with specific local geographical distribution of resources) – the long-term performance of the main actors.

The business history approach throws new light on understanding successful as well as unsuccessful stories, and the history of this sector is full of both. Travel agencies, hotel, and tourism groups reproduce, with a few differences, the national business models: the large and managerial enterprise with its large bureaucratic and strong financial structure in France (where families nevertheless play an important role, interacting in a more or less informal way with financial institutions, as the recent developments in the Accor Group management structure seem to show), the United Kingdom, and Germany;
the family business with its limits – but also with its extreme flexibility and creativity – in Southern Europe, especially in Italy and Greece, while in Spain the emergence of medium size or even large groups is, in some cases, one of the main characteristics even in this sector of the modernization process, which has taken place in this country in the last two decades.

For a long time, in the pioneer era, during the major upsurge of mass tourism in Europe, family firms were dominant everywhere. The tourist appreciated the modest but warm approach of the family running the hotel or the resort (whose structure was most probably very Spartan so that to speak of them as authentic resorts does not appear to be a very suitable expression). Then the tour operators, the charter flight companies, the travel agencies multiplied their efforts, following the increase in the standard of living in Western European societies. This engendered different responses in the Mediterranean area, where the entrepreneurial culture, if it existed, was different compared to the rest of Western Europe. Mass tourism and its increasing demand for better quality and cheaper prices played a crucial role in changing the mentality of the social and economic actors in this sector. Some countries or areas went directly to the core problem of the tourism structure (the hotels and resorts, the beaches, the infrastructures, etc.), trying to cope with the new demands and styles of mass tourism; others ignored these factors, and tried to multiply and diversify what they were offering outside the traditional structures, which remained more or less the same.

The Spanish case and, to some extent in more recent years, the Portuguese and the Greek, belong to the first category. A huge effort has been made in the infrastructure of these countries, under the pressure of the big international tour operators and with the use of EU regional funds. This policy has also permitted the emergence of important local groups that have been able to interact with the big European tour operators. The Italian case shows different patterns. In the Peninsula the logic and the culture of family business still dominate. Few groups have emerged as national or international actors, and when they did so, they remained in a relatively secondary position in their relationships with the big names in the European sector, especially those located in Germany and in the United Kingdom. Vacations are a framework in which seaside activities are just a part (and a decreasing part at that) of the time devoted to relaxation; increasing priority is given to dance halls, night clubs, water parks and many other attractions, as well as activities like gymnastics, karaoke, and so on. The Italian beaches are less popular with foreign tourists, although they are, with some difficulty, resisting this trend in terms of the home market. Foreign tourists tend to associate Italy more and more with culture and towns of art and historical importance (Rome, Florence, Venice, etc.), reducing Italy’s importance as a traditional summer destination, which
can also be explained by the relatively expensive cost of spending a vacation, compared with many other destinations in the Mediterranean.\textsuperscript{13}

Another element directly connected with the emergence of mass tourism is, in a way, its opposite: elite tourism. The diversification of the offer and the competition of more exotic places outside the Mediterranean Basin have contributed to readdressing part of the tourism structures and flows in this direction, with remarkable success in many cases. But elite tourism has partly lost its original meaning, because investment in luxury structures and resorts is not the only way to transform tourism.

**Not Only Mass Tourism: The Environment Issue**

The environmental question, as a crucial element for many people when they have to evaluate and compare one vacation destination with another, has contributed to a massive change in the priorities and thus the structure of the costs in the tourism industry.\textsuperscript{14} The emergence of the environmental question in the tourism industry has reinforced the need for strict coordination between different levels of responsibility: the local and national governments, the entrepreneurial associations and pressure groups of the tourism sector, the ethics of all the actors working in this industry, and also of any person connected to an economic or an industrial activity in tourism areas. In fact, the coexistence of different sectors is partly the historical result of the economic development of the Mediterranean countries. Today it may become the basis for a more balanced growth, but also a new source of major conflicts of interest, which urgently require political decisions. Environmental and tourism policies are not at the top of the political agenda of national governments in Southern Europe. The situation is slightly better where local or regional governments have more power to intervene directly in such issues. For many years some of them appear to have been extremely interested in modernizing their tourism policies while respecting the environment. In many areas of the north basin of the Mediterranean Sea, and especially the islands, most of these institutions have worked together coherently and successfully to offer new areas of discussion with all the political, economic, and scientific actors involved in the tourism industry.

In order to counterbalance this attitude, one should also consider that in such cases it is also relatively more difficult to maintain the objectivity and independence of the local, sometimes very powerful, pressure groups, both in tourism and other sectors. In other cases, like in Sardinia, the offensive of the local government for sustainable tourism led to new taxes on luxury tourism, opening the door to a new political conflict, possibly leading to domestic tourism competition in Italy between tourist regions led by center-right or
Introduction: The Mediterranean as a Tourist Destination

center-left regional governments. Local governments, politicians at national level, opinion leaders, and even, to a certain extent, “jet-set” people, all seem to be interested in discussing the uses and abuses of mass and deluxe tourism in the Mediterranean area. Most of them do not have a clear understanding of the complex impact of tourism on those regions, nevertheless insisting on the positive role it is playing in economic development. Only a long-term perspective can ensure that decisions about tourism will not be the ephemeral result of partial approaches, dependant on the distorted use – and abuse – of economic data that in this sector are so difficult to accumulate, and very easy to manipulate. The approach to the history of mass tourism in the Mediterranean area over the last years proposed by this book might possibly offer some suggestions aimed at creating a more consensual evaluation of the vision necessary to develop a tourism policy with a good balance among mass tourism, environmental preservation, economic development, and sustainability.

Notes


15. The center-left Sardinian regional government, led by the Internet entrepreneur Renato Soru (the founder of the Tiscali company), introduced a tax on luxury boats harbored in the island’s ports in the spring of 2006, and reduced the number of planning permits to build new second houses along the coasts of the island by a large margin. In late summer of 2006 the center-right Veneto regional government launched a major press campaign suggesting that all the boats taxed in Sardinian harbors would not pay anything if they sailed to Veneto.
Chapter 1

Flying Visits
The Growth of British Air Package Tours, 1945–1975

Peter Lyth

Do you remember the magic carpet of the fairy-tales? Silently, swiftly, effortlessly it floated its passengers to their destination. Perhaps you have wished for just such a magic carpet to take you to the holiday places you long to visit…. well, this booklet contains the answer … the magnificent air fleet of BEA can carry you to the holiday country of your choice with ease, comfort and speed.

– The Best Holiday of Your Life, British European Airways (BEA), brochure publicity, 1957

Two closely interwoven threads in the economic and social fabric of the twentieth century are the development of the international tourist industry and the growth of commercial air transport. As international tourism became the largest single industry in the world, so air travel became popular and “democratized,” with the tourist replacing the businessman as the typical passenger.¹ In economic terms, the trend was an important part of the shift in employment and investment from manufacturing to the service sector; as a social change it is comparable to the effect in Britain of the railways on Victorian society. Air transport caused a revolution in the use of leisure time. Combined with rising levels of disposable income and a breakthrough in technology, it allowed workers of the cold and industrialized nations of northern Europe (and North America) to travel south, for vacations of “sun, sea and sand.”

¹ Notes for this chapter begin on page 28.
This chapter is about the leisure industry, which grew up in Europe with mass air travel. It focuses on Britain, the pioneer of this industry, in the three decades following the end of World War II in which Europe enjoyed unparalleled levels of economic growth, with major increase in both the demand and supply of tourist services. It argues that British air tourism to the Mediterranean took off in the 1960s because of a combination of economic, social, and technological factors influencing both demand and supply. A greater propensity to take vacations and a proletarianization of Britons’ foreign vacation-making combined with the entry of new capital and entrepreneurs into the independent airline industry in Britain, at the right moment to exploit the jet engine’s development as a successful propulsion system for commercial aircraft. By taking the British case as an example of the crucial link between technology and growth in the international tourist industry, the chapter shows that jet engines not only changed the size of the industry, but also its character: as jets made it faster, tourism became cheaper and moved down market. Tourism became cheaper as it became faster.

Tourist Demand in Britain

Before World War II, only a few Britons took vacations abroad. Many workers could not afford to take vacations at all and for those who could, domestic resorts by the seaside like Brighton, Blackpool, and Scarborough, or regions of natural beauty like the Yorkshire Dales, the Lake District, and the Norfolk Broads, were sufficient to provide a break of a week or two away from their places of employment. This pattern changed fundamentally with the war. By 1945 many lower and middle-income Britons had traveled abroad for the first time with the armed forces, and many more had become familiar with aircraft and air transport. Their horizons had, literally, been raised. Then, in the twenty years of economic growth that followed the war, their living standards also rose. As they joined the consumer society, they began to take for granted things like cars and electrical goods, which had been regarded as luxuries only a generation before; and, not surprising, an annual vacation consisting of two weeks at a wet and windy resort on the North Sea was no longer enough. Britons wanted the sun and they wanted to travel to where warm weather was guaranteed, namely the Mediterranean. The new British tourist, however, remained suspicious of travel abroad and worried about encounters with foreign officials, foreign languages, foreign culture, and foreign food. For the average working or lower-middle class Briton, “abroad” was an intimidating concept and they were not ready to follow in the footsteps of their more educated compatriots and make their own travel arrangements on Channel ferries and Continental
railways. What they needed was a *Fordist* solution to their demands and they found it in the “inclusive tour,” the *holiday from the assembly line.*

Inclusive tours were not new – Thomas Cook had pioneered them in the 1880s. What was new was their combination with air transport. Not only was it very much faster than transport by train and ferry, but it had the potential to be much cheaper and, reassuringly for the uninitiated British tourist, it transported him directly to a beach resort in the duralumin cocoon of an aircraft fuselage, thus “protecting” him from the foreign and unfamiliar. The opening quotation, from a 1957 British European Airways (BEA) brochure, gives a sense of this cocoon by referring to a “magic carpet.” The holiday jet is a socially determined technology, a function of the behavior and psychology of a social class. The historian David Nye has shown how “the tourist gaze … is embedded in technological structures” in such a way that the modern tourist exerts his or her mastery over tourist *sites.* This “embeddedness in technological structure” is also present in transport to a tourist destination. The new British tourist, visiting Spain for the first time in the 1960s, wanted sun, sand, and sea, and perhaps the occasional packaged “artifact of the tourist gaze” (a bullfight perhaps?). But he was not interested in the cultural splendors of the Spanish hinterland; his sunny beach could just as well have been anywhere along the Mediterranean littoral.

Just as the inclusive tour and the chartered jet aircraft were key technological developments for Spanish tourism, so the resorts of the Spanish Mediterranean coastline and the Balearic Islands, was a key element in the demand structure generated by the new British tourist in the 1960s (see table 1.1).

| Table 1.1 Foreign destinations of British tourists, 1951–1972 (percentage) |
|-------------------------------------------|---|---|---|---|---|---|---|---|---|
| Spain /Majorca                           | 6    | 10   | 23   | 22   | 23   | 25   | 30   | 34   | 32   | 35   | 36   |
| Italy                                    | 14   | 17   | 19   | 21   | 19   | 16   | 12   | 12   | 13   | 10   | 11   |
| France                                   | 40   | 33   | 28   | 26   | 21   | 19   | 16   | 15   | 16   | 15   | 16   |
| Ireland                                  | 26   | 15   | 10   | 9    | 9    | 11   | 10   | 10   | 8    | 6    | 4    |
| Austria                                  | 6    | 10   | 9    | 9    | 10   | 8    | 8    | 10   | 8    | 6    | 6    |
| Switzerland                              | 14   | 14   | 14   | 11   | 10   | 9    | 8    | 8    | 7    | 6    | 7    |
| West Germany                             | 3    | 11   | 12   | 13   | 13   | 10   | 10   | 9    | 11   | 9    | 8    |
| Belgium/Lux                              | 15   | 11   | 14   | 12   | 10   | 9    | 8    | 7    | 6    | 6    | 6    |
| Netherlands                              | 4    | 7    | 4    | 5    | 5    | 4    | 5    | 4    | 4    | 4    | 4    |
| Scandinavia                              | 2    | –    | 3    | 3    | 4    | 3    | 3    | 4    | 3    | 3    | 3    |
| Yugoslavia                               | –    | –    | 2    | 3    | 3    | 3    | 3    | 3    | 4    | 4    | 5    |
| Greece                                   | –    | –    | 2    | 2    | 1    | 1    | 2    | 2    | 2    | 4    | 5    |
| Portugal                                 | –    | –    | 1    | 2    | 2    | 1    | 2    | 2    | 2    | 2    | 2    |
| USSR/Europe                              | –    | –    | 1    | 1    | 1    | 1    | 1    | 2    | 2    | 1    | 3    |
| Canar./Madeira                           | –    | –    | 1    | 1    | 1    | 1    | 2    | 1    | 2    | 2    | 2    |
| EUROPE                                   | –    | –    | 94   | 93   | 96   | 94   | 93   | 93   | 93   | 93   | 90   |

Unlike the traditional overseas resorts in France, Italy, or Switzerland, Spain developed spontaneously as a tourist destination, based on jet aircraft, its low cost-of-living, and the active encouragement of the Franco regime. The Spanish aimed for mass, low-cost tourism and set about developing former fishing villages to cater to British and German tourists of modest means. As the pioneer high-speed tourist destination, Spain was immensely successful and the number of foreign visitors it received rose rapidly from around 2.5 million in 1955 to 43.2 million by 1985.

The general picture of British tourist demand, therefore, is of continuous and rapid growth. By 1970 about 5.7 million Britons were taking overseas vacations and spending around £460 million a year on them. At least half of these were package tours and, as it became easier and cheaper with jets to reach resorts like the Costa Brava and Palma de Mallorca, the British inclusive tour holiday business increased in volume and moved steadily down market.

Tourist Supply in Britain

Tourist demand in Britain preceded supply, and construction of an efficient international tourism infrastructure in Britain was unplanned and somewhat muddled. Tourism supply – apart from the intrinsic attractions of the tourist destination itself – consists of accommodation and transport, plus ancillary services such as restaurants and souvenir retailing. This chapter deals with transport and, in particular, the revolution caused by aircraft, jet engines, and the growth of independent British airlines.

British Independent Airlines

After World War II, three British state-owned flag carriers emerged from legislation passed by the Labour government in 1946. The government expected that in the post-war world Britain’s civil aviation effort would be the exclusive responsibility of these nationalized airlines and it awarded them monopolies to carry out scheduled services in their designated areas. It was not anticipated, or considered desirable, that privately owned independent airlines would play a significant role in either domestic or international air transport, although they would be allowed to offer their services for private charter, much as a taxi is allowed to operate in a city with public transport. “It is not proposed to exclude private operators from charter and taxi work,” a junior minister informed the House of Commons in 1946, “but I want to give a clear warning that any attempt to run regular services under the guise of charter work will not be tolerated.”
This is not the place to examine Britain's post-war policy on commercial air transport; it is sufficient to note that that policy followed a somewhat chaotic path between 1945 and 1965. What is important to mention, however, is that civil air transport evolved in those twenty years in a manner that the politicians of the late 1940s did not envisage. They got it wrong; and for the very understandable reason that they did not foresee the democratization and huge expansion in international air tourism.

Initially, independent British airlines were precarious, “seat-of-the-pants” affairs, never far from bankruptcy. Typically they were the creation of an ex-serviceman who had managed to scrape together sufficient capital to buy one or two war-surplus Douglas C-47 (“Dakotas”; DC-3s in civilian use), of which there were thousands in Europe after the war. Besides private charters and helping out in the 1948 Berlin Air Lift, their operations consisted of running services on behalf of the nationalized flag carriers, British Overseas Airways Corporation (BOAC) and BEA, whose initial embarrassing shortage of capacity led them to make use of British independent airlines as “associates,” and offering the occasional vacation air tour. Scottish Aviation, for example, offered an “air cruise” in the winter of 1946, flying tourists from Prestwick (Glasgow) to the Costa del Sol, and on to Estoril: “Estoril, with its hotels, sports and entertainments, preserves a balance between the romantic character of the Peninsula and the requirements of contemporary civilisation … it is for this reason that Scottish Air Express has chosen to make it the centre for this air cruise … The fare of £120 per person payable in advance is completely inclusive and covers €€€, hotel accommodation, transport between airports and hotels, meals in flight and the service of the Scottish Air Express guides and representatives in Estoril.” The price of £120 to fly in a converted Liberator bomber to Portugal was very high for post-war austerity Britain, and it confirms that Scottish Aviation’s customers were prosperous middle-class Britons – tourists in the pre-war mould – they were not the new British tourist of the 1960s.

The salvation of British independent airlines was not tourists but soldiers. At the time of the Korean War someone in government had the bright idea that troops could be moved more quickly by air than by sea to international trouble spots and Britain’s remaining colonial garrisons. These air trooping contracts with the Ministry of Defence kept British independent airlines airborne in the 1950s; as one authority has put it, it was their “bread and butter.” Trooping was easy, contracts were large, costs were low, and load factors guaranteed to be 100 percent. Furthermore, trooping was the one market from which the nationalized air corporations (BOAC and BEA), were specifically excluded, “making it in effect a means by which the government could provide private airlines with an indirect subsidy.” The first contract for a year went in 1950