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The blue - grey transition: heritage in the reinvention of the tourism resort

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Abstract

Tourism destinations reinvent themselves for various reasons ranging from intrinsic characteristics of tourism demand, economic behaviour and attitudes towards environments and local communities. An idea currently popular among the managers of tourism facilities, heritage resources and local places is the shift from coastal resort 'blue' tourism to urban heritage 'grey' tourism. This article will examine the processes and instruments of such change, the constraints and issues associated with it and the possible scenarios. Various European cases will be used to strengthen, extend and contradict the argument.

Tourism destinations reinvent themselves for various reasons. Traditional product life cycle analysis (Butler, 1980) even suggests that all tourism destinations are in necessary continuous process of change, resulting in either decline or reinvention. This article however examines the motives, processes and results of one particular but widespread type of repositioning of tourism destinations, namely the deliberately planned shift from 'blue', sea-side resort based tourism to 'grey', heritage based tourism which often includes elements of the 'green'!). This involves a fundamental move away from what has been called the 'plain vanilla' sun and sea product (MTA, 2002a) to a tourism product range redefined to rest on the heritage resource.

This article explores the answers to the basic questions of motivation (why is change deliberately attempted and, concomitantly, why is present or past success deliberately abandoned?); the process and thus consequences of such a change; the main conditions for successful transition and, finally, the three scenarios are likely to result.

Why change?

Trends within tourism demand.

The story of the quite spectacular success of Mediterranean coastal resort tourism since the 1960s has been related by many observers. For example, Priestley's (1995) account of the emergence and growth of Mediterranean coastal resort tourism, with reference to the product leader viz. the Spanish 'Costas', has been echoed in other destinations around successively the Western Mediterranean, Eastern Mediterranean. The Mediterranean coast resorts were the pioneers and the archetypes but falling travel costs and increasing tourist familiarity and adventurousness have extended blue holiday horizons into the Indian Ocean, Caribbean and beyond. The product characteristics have however remained remarkably unchanged in their main features through both time and space. The successive phases were initiation in the 1950s with the introduction of the inclusive 'flight + hotel accommodation + some meals' package, explosive growth in the 1960s based on standardised production and falling costs in ever extending markets, continuing growth through the 1970s/1980s punctuated by some oscillations, reaching in most destinations a plateau at some point in the 1990s and a widespread expectation of at best stability and at worst steady decline.

It is worth noting before passing to the arguments for abandoning this phenomenon that it has been highly successful in many ways. In a period of only around 30 years the Mediterranean beach holiday transformed the economies, social expectations, political structures and not least the physical environments of a large part of the world, while

introducing the idea of foreign, and specifically warm holiday destinations to a generation of largely western Europeans.

There are two main trends within tourism itself that are widely perceived as threats to this historic success of the generic Mediterranean beach product. First, there is the growing importance of 'special interest' and 'place specific' tourism relative to what could now be termed this 'traditional' resort tourism. These highly diverse, and inevitably vaguely defined, 'new' tourisms consume a wider range of products, including cultural and heritage experiences, are more spatially dispersed and are not so dependent upon the cost conscious organised package product. They are 'place specific' and 'experience specific' in that the distinctive comparative advantage of a 'unique value proposition', is generally place-bound and they create situations where 'every visit would be a unique experience' (MTA 2002a: 6). Secondly, and to an extent consequently, the 'traditional' market is now widely viewed as if not 'saturated' then at least likely to exhibit a relatively slow growth in the near future. This is a consequence in part of changes in the demand for holidays from increasingly experienced and selective markets but also from changes in their supply. The basic resource upon which the Mediterranean beach holiday is based is in plentiful supply, at least within broad climatic zones, and the continuing decreasing costs of air travel have rapidly increased the possible destinations. There is thus likely to be increasing competition for a static or even shrinking traditional market from other destinations both within and now well beyond the Mediterranean. Additionally tourism is frequently viewed, generally correctly, as an attractive option in the earlier stages of economic growth, offering a well known and travelled path of development. Consequently new competition can be expected from countless places that not only have similar physical resources to the established resorts, but also can frequently offer very similar holidays at substantially lower cost as a result largely of much lower labour costs. Even the advantage of a reassuring familiarity enjoyed by many long established resort regions is likely to be less advantageous in an increasingly experienced and sophisticated market.

As a consequence of such trends within tourism this branch of the industry appears likely to experience almost static economic returns. Even discounting temporary trade cycle or politically induced oscillations, such as the current malaise, most observers are not optimistic about the future growth prospects for traditional beach resort tourism, even in previously highly successful destinations. Decline is possible or at the very least, destinations are unlikely to benefit from the sort of growing economic returns that have been enjoyed in previous decades. Hotel occupancy rates are dropping, there are fears for an oversupply of facilities, especially hotel beds, and for returns on existing investments (MTA 2002a). In this future, admittedly somewhat pessimistic, scenario, at the very least the tourism industry cannot be expected to play the significant role as motor to the economy in many regions that it has in the recent past and the very substantial real estate investments that have been made in the last 20 years are seen to be at risk. Tourists are simply more mobile than the hotels that accommodate them.

Wider trends

Such trends and predictions within tourism are of course embedded in wider economic and social change. The idea of an increasing product differentiation in search of higher value added products for increasingly segmented markets is familiar and is provoking similar reactions by suppliers in many other economic sectors, especially direct customer service activities.

There are additionally many other relevant concerns motivating the idea of change.

Changes in tourism as a result of the perception, valuation and consequently customer behaviour towards the environment, however defined, is part of a wider global awareness of the impacts upon the physical environment. It is however, particularly evident and exacerbated by the tendency towards spatial concentration of much 'blue' tourism, which in any event often occurs in areas with specific physical environmental shortages or vulnerabilities. There is a feeling, whether justified by realities or not, that some areas are approaching (or in some scenarios may have already exceeded) physical capacities. Unsurprisingly therefore there is much local political interest in a future led by a 'controlled growth scenario' (MTA 2002a: 32), presumably in contrast to the past three decades where growth has been near continuous, expected and above all 'uncontrolled'.

To these trends in the valuation of the 'green' environment can be added similar growth in concern for the 'grey', the buildings, sites, monuments of the historic built environment, which together with historical associations and personalities is increasingly commodified into heritage to serve various markets. The simple proposition is that while 'blue' tourism may either ignore or even damage 'grey' resources, their use in shaping new heritage tourism products has a number of advantages argued in more detail below.

Thirdly the interaction of incoming tourism and local resident communities has become a widely studied topic with an underlying assumption that not only should the needs and wishes of residents be incorporated into tourism development strategies, they should quite explicitly take precedence over those of the tourists. Heritage tourism is assumed to have higher local benefits and lower local costs than beach resort tourism and thus be more clearly in the economic, cultural and political interests of local communities. This proposition can be questioned (Ashworth, 2003) but remains a significant factor in the creation of local policy not least for a tourism sector popularly seen to be on the defensive on a number of fronts.

In summary 'grey' tourism' is seen to fit into a number of fortuitous symbioses. A potential solution to a perceived problem within tourism becomes also a partial solution to a number of otherwise quite unrelated problems. Heritage becomes central to the solution of a tourism problem while tourism becomes part of a number of synergies including local economic development, environmental conservation, the enhancement of heritage and cultural production, and even the senses of identity and well-being of local communities.

Therefore it is not surprising that international tourism being international in both its markets and its product supply should be aware of these trends and responding in similar ways across the globe. Much of the Mediterranean in particular is currently investigating the possibility of increasing the heritage element in existing largely beach tourism. Such policies have such obvious and well known advantages that it is equally obviously likely to intensify competition between destinations, even in the context of a market for such place specific tourism, whose continuing growth is widely assumed. For instance, Turkey from the beginning of its modern tourism development in the 1970s and 1980s stressed a combination of Mediterranean climate and beach attractions together with heritage sites largely from a classical period with which the main western European markets strongly associated. Cyprus, whether the Republic of Cyprus (Mansfeld & Kliot, 1996) or since 1974 the TRNC (Akis & Warner, 1994), has long attempted to move in the same direction (see also Lockhart & Ashton, 1990; Lockhart 1993), again by using a largely classical heritage familiar in the main markets. Elsewhere similar developments are occurring in Greece, Israel, the Croatian coast of former Yugoslavia and parts of North Africa, especially Tunisia. Further afield many of the Caribbean islands have attempted such diversification and elsewhere, notably, Bermuda and Malta consciously markets historic dockyards and heritage associations (Tunbridge, 2002).

The statement of the arguments

The above argues that a shift from blue to grey is explicable by changes within tourism itself but whether this should it be welcomed and encouraged by local policy, or conversely deplored and discouraged, raises wider issues. A shift in whole or in part from beach resort tourism to heritage-based tourism is more than simple product substitution. It has a number of predictable consequences some of which are desirable and beneficial and others which are not.

The 'welcome' argument

The welcome argument and its policies is supported by a series of assumptions which are more often taken to be self-evident truths rather than propositions to be demonstrated. Blue to grey is assumed to be a move 'upmarket', which will reduce many of the costs of tourism impacts, while maintaining or increasing revenues and reaping various benefits, other than to tourism such as, for example, the maintenance and promotion of cultural sites, artefacts and events. At its simplest the move from blue to grey is equated by many with a shift in product from the mass production of a low cost homogeneous product to a more heterogeneous, higher cost product for a differentiated market. Simply a wider range of products is sold to fewer customers at a higher unit price. More revenues and thus economic benefits are acquired from fewer visitors who thus impose lower costs in many respects. A more differentiated product is likely to spread both benefits and costs more evenly, spatially, socially and among economic sectors.

This argument could be elaborated by two other characteristics of 'grey' tourists, namely the much higher daily expenditure and the more dispersed seasonal pattern of arrivals. The first results from the nature of grey tourists who are on average older and richer than blue tourists and from the dominance of hotels in choice of accommodation. The second results from the absence of a dependence on destination weather characteristics. However the timing of holidays is more determined by the rhythms of employment and education in the country of origin, which admittedly may be less restricting for those not constrained by work or children who are more numerically dominant among 'grey' tourists.

There are a number of additional, important, but usually less measurable, assumed benefits. One of the most important of these is the support that tourism is assumed to provide to local cultural and heritage facilities and production. The Mediterranean location of many beach resorts has endowed them by chance with a remarkably rich heritage potential as a result of it being the arena for the flowering of a number of civilisations. Such a globally outstanding endowment offers a remarkable opportunity, especially for tourism, but also imposes an equally remarkable burden of responsibility upon the local population not least in the foregoing of alternative local development possibilities and more pressing economic and social priorities. It is now envisaged that tourism can contribute to the solution to these heritage problems. At its simplest it could provide a use for the significant amounts of the historic fabric that are currently under used or disused in many such tourism regions (see Chapman, 1999: 262 on Valletta). Direct earnings from tourism may defray some of the costs of restoration and maintenance. Indirectly heritage use within tourism provides a justification for public attention and subsidy; and tourism has an important educational and promotional role in bringing this heritage to the notice of a global market. This raises the central question of to what extent can tourism be recruited to help to preserve, maintain and interpret a heritage whose importance far transcends its value to this commercial activity and whose main market lies outside tourism.

Even more broadly, it is usually implicitly assumed that selling your local heritage is somehow more beneficial to local communities than selling your weather and beaches. Such benefits may be assumed to lie in community involvement in the activity or be the psychic profits of enhanced local awareness, esteem and pride. It may just seem more worthy and valuable to sell buildings than beaches; culture than sunshine; education, improvement and enlightenment rather than indolence, indulgence and pleasure.

The unwelcome argument'

There is, however, always an 'however' to disturb such contented synergies and complacent equilibria. This is especially likely to be the case when grey tourism is laden with so many expectations and is seen as at least as a contribution to so many, and so diverse local problems.

Some of the most insistent caveats stem from differences in the typical behaviour of blue and grey tourists. The two most important of these are first, that the length of stay at heritage tourism destinations is much shorter than in beach resorts. The average length of stay of beach resort holidaymakers is around 10 days, this being an average of two week bookings (in most resorts c.50%) and one week and shorter excursionists. By comparison heritage tourism products are very rapidly consumed by the tourist. The length of stay in even major urban destinations is rarely more than 2 days. This is not just that the motives for travel to cities are more varied and include many short stays not primarily motivated by holidaymaking (Berg et al. 1995). Even the world's most renowned cultural tourism centres such as Florence, Venice, or Bath cannot generate long stays in any single centre (Borg et al.,1996). Centuries of historical experience and cultural productivity are consumed in a few days. In smaller cities the stay is better measured in hours. There is only meagre and sporadic research on this topic (see the exceptional work of Dietvorst, 1994; 1995 on the time-space budgets and consequent behaviour of tourists to medium sized historical towns). There is no reason to assume that the average 4-6 hour length of stay of holiday excursionists in Valletta (Mangion & Trevisan, 2001), or 2.5 hours in Delft, is exceptional. An individual heritage museum, building or site however important will have an average stay better measured in minutes than in hours.

Secondly beach resorts may develop substantial numbers of return visits to the region and even to a specific resort or hotel. In Maltese resorts for instance almost half of tourists are return visitors and about a third could be classed as 'regulars', returning at least three years in every ten. Although it might be expected that such habitual patterns would weaken in a market of increasing experience and sophistication. There are various intrinsic reasons why heritage attractions tend not to foster such a loyal clientele and generate return visits. First much heritage tourism could be labelled Michelin/ Baedeker collecting. Tourists have pre-marked sites and artefacts that must be visited if the place is to be authentically experienced. Once 'collected' a repeat is superfluous and the collection must be expanded elsewhere. Ironically the more unique the heritage experience, the less likely it is to be repeated. A generalised place product (London's *Embankment*, Bangkok's open markets, Paris' *Champs Elisée*, Barcelona's *Ramblas* and the like) is far more likely to be repeat consumed than a original and specific one (the Taj Mahal, Eifel Tower or leaning tower of Pisa). Equally the more renowned and unique the heritage product, the more difficult it is to renew and extend the range of heritage products on offer. Sites can become imprisoned in the immutable uniqueness of the site and the unvarying but stringent expectations of visitors. It would be particularly difficult to sell medieval Bath or nineteenth century industrial Venice to visitors whose expectations are so strongly focussed elsewhere, regardless of the quality of the existing heritage resources in those periods.

Secondly heritage consumption, like culture more broadly, is extremely prone to rapid shifts in fashion and changes in taste. It may seem that heritage, being based upon resources from an historic past would be in essence timeless and those based on cultural productivity imbued with immutable values but this is far from the case. Heritage is the contemporary uses of the past and these uses, responding to contemporary needs and demands are very prone to very rapid changes in demand. The consumption of history is a fashion industry and like all consumption of culture part of contemporary life styles. Thus what, and who, is currently, and in terms of the time span of developmental investment will in the next 10 years, be popular will depend upon a fickle and fashion conscious market.

A pessimist would now point out that grey tourism provides the worst possible combination of fickle markets and immutable products.

How can you change from blue to grey?

The short answer to this question is that you change the product, the market and the links between the two. Much policy has focussed initially and principally upon the first whereas it would be more sensible to approach first changes in the market.

Market change

The stereotype of the average heritage tourist has been summarised by many observers (Prentice, 1993; Ashworth & Tunbridge, 1990; 2001; Boniface & Fowler, 1993; Page & Hall 2003). The almost universal caricature of the stereotypical 'Baedeker/ Michelin tourist', is aged 45-65, with higher than average disposable income, education, and travel experience, holidaymaking independently in a group of two and staying in hotel accommodation. This remains the most profitable sector and is likely to remain so as a result of demographic, educational and economic trends, The 'grey market', in a different sense, is itself a growth market especially in Western Europe, and is the main consumer of heritage attractions in particular, is relatively high spending and increasingly adventurous in seeking out an ever widening range of heritage product. However it is worth noting briefly that the heritage tourism market is far more varied. There is a retirement migration market to Southern France, Spain, Malta, Cyprus and elsewhere which has a relationship to previous holidaymaking patterns. Alongside the independent traveller there are cultural tour markets especially from more distant origins, conference markets attracted by either the 'blue' or 'grey' place characteristics and cruise markets. There is a sensitive relationship between the burgeoning cruise industry and land based tourism facilities. Cruise ships provide accommodation and meal packages but despite short stays of c.6-8hours, passengers are shore dependent for much heritage site visiting, and even some food and entertainment. Island port stops in Malta (with over a quarter of a million cruise visitors, MTA, 2002b), Madeira, Bermuda and the Caribbean illustrate the possibility of successfully using this market to supplement tourism demand.

Finally, in addition to the 'Baedeker' market, there is also what could be termed a 'Lonely Planet' or 'Rough Guide' market. This has of course different and lower patterns of expenditure but serving this expanding and heritage-orientated niche market among the young by encouraging the development of small, inexpensive, backpacker bed and breakfast provision, which may have useful advantages for spreading the benefits of tourism both economically and spatially, for example by utilising under-occupied building stock. There is also truth in the axiom that today's backpackers may be tomorrow's hotel visitors. It is worth adding that some 'blue' resort areas have developed substantial language school industries

(Malta for example has around 60,000 foreign language school visitors, MTA, 2002b) which have some relationship to tourism markets, facilities and heritage amenities in a broad sense.

Product change

The characteristic behaviour of heritage tourists, as outlined above, require two main reactions in the creation of the heritage product. Short stays, non-repeat experiences and rapid shifts in fashionable tastes, need a response in an equally rapid continuous extension and differentiation of the heritage product line. The paradox is that the more unique, important and complete the heritage attraction and the greater its aesthetic or historic perfection, the more difficult it will be to extend the product and the greater the resistance to such change of both the visitors, with their pre-structured expectations, and the managers of the heritage facility, with their different valuation of the purposes of heritage.

In addition to rapid product change spatial and functional networking is required. The implications of short stays especially is that sites and attractions need to be combined within larger packages. The traditional beach holiday is by its nature spatially concentrated and relatively static, generally offering almost all of the components of the holiday within a single resort or even a single hotel. Few extraneous elements of the package were employed and little transport was actually required during the holiday. The shift to heritage tourism alters this substantially. In particular spatial networks require transport. The simple point that is being made here is that the changes within tourism that are being actively encouraged are both themselves dependent upon the existence of suitable transport, without which they will not occur, and will contribute, if they are successful, to a wider demand for transport. Heritage tourists not only move into and out of destination regions and resorts, they move around when on holiday. Thus the attempt to stimulate new elements in the consumption package of visitors let alone the development of new heritage tourism product lines is likely to increase tourism travel demands. The pursuit of policies for enhancing this package with excursions, many of which will be to heritage sites and attractions, with social and cultural events and experiences and with evening entertainment facilities cannot other than increase the transport demands of tourists.

The necessity to extend the product also results from the need for what can be termed the 'enhanced heritage tourism package'. Here the consumption of heritage products is supplemented by the consumption of such features as, food, wine, speciality shopping, cultural performances and evening entertainment both as an extra attraction and as a more general atmospheric backdrop to heritage tourism activities. In particular a characteristic of the Mediterranean tourism product has long been the enhancement of the natural features of climate and coastline with what is perceived, especially in North-West European markets as, 'La vie Méditerranée', which is a composite of the above features within a relaxed 'latin' life style. 'Blue tourism' enhances its package in this way but the argument here is that 'grey' tourism is more dependent upon the enhanced package and the elements involved are significantly different. This simply implies that considerable attention needs to be paid to the development of such facilities other than those generally associated directly with the consumption of heritage. It could be added that the enhancement elements mentioned here tend to be urban and strongly associated with the broader concepts of the 'tourist-historic city' (Ashworth and Tunbridge, 1990; 2001) whereas 'blue tourism' is specifically non-urban which raises many planning issues too wide to be considered here.

Finally in considering the shaping of the heritage tourism product it needs to be stressed that heritage is not a free potential resource offering countless possibilities for flexible commodification into tourism products despite the attitudes of many within the tourism industry who view heritage as a zero-cost, freely accessible public good. Simply

heritage costs money for its preservation, continuing maintenance, management and presentation. Heritage tourism is too often seen as a marginal use of already existing resources whose demands can be accommodated without extra cost or the displacement of other users. This is rarely the case and the use of heritage in the formulation of products for the foreign tourism industry must always be aware that heritage is in multiple use in multiple markets. In general throughout the world the most important use of heritage is the political legitimization of current governments and ideologies and the shaping of local identities (Graham et al, 2000). Of course it may be argued that the heritage of the tourist is quite different from that of the residents which results in two conditions. If the same products are sold to both groups then potential heritage dissonance occurs (Tunbridge and Ashworth, 1997). In particular it might be expected that in many existing 'blue' resort areas, post-colonial nation building would be a major function of heritage. This is evident in many island states where some place nomenclature, statuary and interpretations which serve a nationalist or purely local identity function, detracts from or even conflict with the heritage projected to foreign visitors. If however different products are sold to each group at different or the same locations to circumvent such problems then market separation occurs. This requires separate product development which of course sacrifices the perceived advantages of 'free-riding' whether it is the tourist or the heritage managers that is obtaining the extra zero-cost benefit.

It is clear from the discussion above that new markets and new products requires new marketing and management. An 'image make over' is the most visible but not necessarily the most difficult aspect (Ashworth, 1991). The '*sun drenched*' '*leisure island*' with '*200 kilometres of coastline*' and '*clear and transparent waters*' becomes '*7000 years of history*', '*an enigma of prehistory*' and an '*Island of mystery*', to use current slogans of the Malta Tourism Authority (MTA, 2002a). More significantly the above discussion implies that the shift from blue to grey involves quite far reaching changes, not only in tourism, but is wide aspects of cultural policy, urban planning and transport. It therefore requires bodies and agencies capable of operating on such a wide field, with suitable administrative instruments and political responsibilities. Such bodies simply do not exist in many of the regions under consideration here and the question 'who is to does it?' remains unanswered.

Which scenarios should be selected?

There are a number of central issues running though much of the above that can now be combined and stated more directly. The introduction or strengthening of a heritage element within the tourism product confronts the question of the relationship between this and the dominant existing forms of tourism. There is a spectrum of possibilities reduced here to three broad scenarios which move through the options of serving the same markets, through co-existing markets to alternative markets. Each option raises questions for existing markets and existing facilities, their number, nature and spatial distribution. In each of the scenarios below, the two central questions are, 'what new investment in product development, real estate and image creation is needed?' and 'what is the relationship of the new to the existing investments in these fields?'

The supplementary scenario

Here heritage tourism is seen as an 'add-on' to the existing dominant tourism. It is used to enhance the coast resort experience in a number of ways. It can offer dedicated short day and half-day excursion possibilities to heritage sites, exhibitions and trails. Heritage can form an element in excursion activities focusing on nature, shopping, folk-lore or culinary attractions.

As part of wider cultural performances, it can stimulate associated evening activities. It can contribute just a background element against which the beach activities occur and a context of local 'colour'. It thus adds not only variety to the experience but also some local distinctiveness to the otherwise generic product.

The main advantage of this scenario is that it requires only marginal extra investment and it capitalises on the existing accommodation locations. Its main disadvantage stems from the same absence of radical change. It does little to spread the existing concentration of tourism facilities or the economic benefits and costs of the industry. With a length of stay at any one site or even city, measured in hours and even minutes local tourist expenditure is minimal and is frequently claimed to be less than the local costs incurred in receiving such tourists.

Of course heritage already plays this role in many seaside tourism resort regions. Heritage and cultural excursion add-ons are a staple addition to the existing sea/sun packages although their importance remains largely uninvestigated. The question is thus, should this aspect of the existing product for the existing market be extended and enhanced and, if so, how can this be done? More urban heritage products, more prehistoric archaeological sites, more 'craft villages', more heritage walks and interpreted town trails can be developed or the existing sites are developed to improve the experience, extend the stay and increase the tourist spend. Apart from on-site improvements, attention could be paid to better hotel based publicity, better information on accessibility to sites for independent travellers and more inclusion of such excursions in tour operators' promotion. The question remains, however, of whether such initiatives, directed, it must be remembered, at the existing markets, which have expressed only a secondary interest in heritage and culture, repay the effort involved by attaining any of the major policy goals.

The parallel development scenario

More ambitious would be the establishment of heritage as a primary motive for the visit and dominant activity of the holiday, catering for a separate market alongside but substantially different from the existing sea/sun tourism market. This option raises two main issues. First, a new set of products served by new facilities and providing new experiences would need to be developed and promoted as complete holiday packages alongside but quite different from those currently on offer and marketed to quite different customers. There is no question that potential heritage resources exist almost anywhere but their commodification into saleable holiday products capable of supporting heritage motivated holidays requires considerable investment. The shorter length of stay at any one destination and generally non-repeatable experiences render it not only necessary to combine sites and attractions into networks which together create the holiday experience, but also necessary to constantly extend and differentiate the product lines on offer. A place would need to reinvent its heritage continuously in order to satisfy an increasingly sophisticated but capricious market.

Secondly, the core question becomes, 'can two different products, and therefore their associated place images, be sold to different market segments in the same small territory at the same time?' Experience from many Mediterranean destinations such as Spain, Italy, Greece and Turkey, suggests that they can, if the markets can be separately targeted and the tourists separately managed at destination. Differences in the location of the products, seasonality, the social, economic and demographic characteristics of visitors and their demands and behaviour makes such separation easier. Whether such sophisticated marketing and local management skills exist, or can be acquired in any specific place is however more doubtful.

The substitution scenario

Finally there is the idea of a deliberate, centrally directed, shift from one form of tourism to its replacement by another. This is the most innovative, radical and far-reaching long term scenario. It stems logically from the current trends and future predictions in the evolution of world tourism and specifically in the European markets upon which beach resort tourism is currently dependent. It capitalises on the specific and outstanding heritage characteristics of places to create a unique value proposition and distinctive comparative advantage. This has additionally certain clear benefits to heritage preservation and maintenance, local self-identities and self-esteem and more arguably lower environmental or social costs.

There are two main objections. First it abandons past success and the expertise that was developed to achieve this. It thus writes off much of the capital investment in real estate as well as human investment in skills. This may not be politically acceptable and the possibility may depend on the time-scale envisaged for the transition. It also ignores the existing reliable, predictable and effectively manageable existing markets. These may be potentially or actually contracting in numbers and declining in profit margins but they exist, and will continue to exist into the foreseeable future, in substantial quantity. Secondly, although it can easily be demonstrated that the overall demand for heritage and cultural tourism products is expanding and likely to continue to do so for various structural social reasons, so also is the supply of places capable of meeting it. Many places have noticed that heritage tourism is a growing premium market offering premium profits and as many seem to believe that they possess a unique and remarkable heritage. Indeed, there are few national tourism authorities around the Mediterranean that have not declared their intention or aspiration to move 'up-market' and attract tourists by quality rather than quantity. This being the case the competition in this sector is likely to be intense.

Conclusions

A problem of the above descriptions of scenarios is that the temptation to select all, to some degree, is high. There is an understandable temptation when presented with the stark, and necessarily somewhat simplified choices outlined above to respond with the answer, 'let us take a bit of each'. The obvious advantages could be 'cherry-picked' while the equally obvious disadvantages are avoided so that difficult and contentious decisions are eschewed and the existing consensus is maintained. This is rarely in practice a successful strategy as only seldom are such compromises possible and, if possible, desirable. In the anticipated competitive situation, only a whole-hearted commitment is likely to have a reasonable chance of success.

Small islands have intrinsic characteristics that offer both advantages and disadvantages in this context. They have an ease of visualisation and completeness and their relative isolation 'captures' the tourist for a longer stay. The additional advantage of many islands is that they are either sovereign entities or have a considerable degree of self-determination, and can therefore plan more effectively and single-mindedly often with considerable cohesion and consensus (Ebejer & Cutajar, 2001). In this respect Malta, Cyprus and much of the Caribbean has advantages over the otherwise similar Spanish, Balearics or Greek, Ionian or Aegean islands. The major disadvantage of islands is again their fundamental geographical condition. Insularity matters little with relatively static, flight dependent beach tourism but with the far more mobile heritage tourism, there are enormous difficulties in creating appropriate packages and networks of similar attractions. Major tourist-historic cities, for example, like Valletta in Malta, Famagusta in Cyprus or even St George, Bermuda, Nassau Bahamas and Bridgetown, Barbados (see the many cases in

Ashworth & Tunbridge, 2001), would, in a different continental geographical context, enjoy major status as part of wider cultural and heritage tourism circuits accommodating visitors on short stays as part of networks of similar cities accessible to each other. They can develop the 'supplementary' more easily than the 'parallel' or 'substitution' scenarios. The double role, as both heritage tourism network node as well as excursion destination for nearby beach tourists is more difficult to fulfil. The multiple role played by for instance, Malaga, Granada or Gerona in relation to Spanish Mediterranean beach tourism; Montpellier, Nimes or Arles, in Languedoc; Ravenna to the Italian Adriatic or, more recently, Acre to Israeli Mediterranean beach resorts or St Augustine to Florida, is an option largely denied by location. Location, like heritage, is a highly attractive, adaptable and beguiling resource but it is not without its limits or pitfalls.

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