# Move Out of the Sun and into the Past: The Blue-Grey Transition and its Implications for Tourism Infrastructure in Malta

**G.J. Ashworth**
Urban and Regional Studies Institute
University of Groningen, Groningen, Netherlands

**J.E. Tunbridge**
Department of Geography
Carleton University, Ottawa, Canada

**Abstract:** The deliberate, officially driven planned repositioning of tourism destinations, from 'blue', sea-side resort based tourism, to 'grey', heritage based tourism has inevitable implications for the nature, quality and location of the tourism infrastructure. The rationale and anticipated results of this transition are considered here in relation to the case of Malta but similar policies with similar implications are to be found in blue resort regions world-wide.

**Keywords:** Tourism destinations, Blue-grey transition, Heritage tourism, Malta

Tourism destinations continuously change in response to their external economic, social and political environments. Indeed those that do not reinvent themselves in each generation are generally destined to stagnation and decline. This short argument illustrates one type of reinvention, illustrated in a single case representative of a much wider application. This is the deliberate, officially driven planned repositioning of tourism destinations, from 'blue', sea-side resort based tourism, to 'grey', heritage based tourism. This involves a fundamental move away from a sun, sea, sand product to a tourism product range redefined to rest on the heritage resources of the built and natural environments. This almost inevitably has implications for the nature, quality and location of the tourism infrastructure. The rationale and anticipated results of this transition are considered here in relation to the single national case of Malta but very similar policies with similar implications are evident in many, if not most, blue resort regions world-wide (Ashworth & Tunbridge 2005).

The arguments for the blue-grey transition

## Arguments from Tourism

Two well-known trends within tourism itself are perceived as threats to established blue resorts. First, there is the growing importance of special interest and place-specific tourism relative to what could now be termed the 'traditional' coast tourism, of which the Mediterranean coast was the pioneer and archetype. 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 packaged product. Secondly, the 'traditional' market is now viewed as, if not 'saturated' then at least likely to exhibit a relatively slow growth in the near future. This stagnating demand is likely to be accompanied by an increasing global supply, leading to increased competition for this blue market from other destinations, both within and beyond the Mediterranean. These competitors often have similar physical resources to the established resorts but can offer very similar holidays at substantially lower cost largely as a result of lower labour costs. In addition the continuing decreasing costs of air travel are likely to erode any benefits of proximity to European markets, while even advantages of familiarity are likely to be lost in an increasingly experienced and sophisticated market. The scale of this blue resort diffusion is signalled by the news impact of its crises, illustrated notably by the tsunami disaster in Southeast Asia in Winter 2004-5

The blue-grey transition is assumed to counter the expected stagnation or decline in economic returns by a move 'upmarket', as a wider range of products is sold to fewer customers at a higher unit price. In addition it seems to assuage the growing, if still largely unfocussed, concerns about the environmental and social costs of the impacts of tourism. At its simplest the move from blue to grey is equated with a shift from a mass-produced low cost homogeneous product to a more differentiated higher cost heterogeneous product. Not only are higher revenues and thus economic benefits acquired from fewer visitors who impose lower costs, a more differentiated product is likely to spread both benefits and costs more evenly, over space and time, socially and among economic sectors. This argument is supported by two characteristics of 'grey' tourists, namely the much higher daily expenditure, from older, richer and hotel based grey tourists and the more dispersed seasonal and spatial patterns of arrivals.

## Arguments from Heritage

The argument from heritage is that it costs money for its preservation, renovation, maintenance, interpretation, promotion and management. Historical accident has endowed many blue resort regions, especially in the Mediterranean, with a remarkably rich heritage potential. Such, often globally outstanding, endowment imposes an equally remarkable burden of responsibility upon the local population not least in the foregoing of alternative local development possibilities and pressing economic and social priorities.

While the tourism industry may view heritage as a potential quarry of resources, offering almost limitless possibilities for commodification into tourism products, those concerned with heritage may view tourism as a contribution to the solution to its problems. At its simplest tourism may provide a use for currently under-used or disused historic structures (Chapman, 1999: 262),

provide some direct earnings to defray some of the costs of restoration and maintenance, provide a political justification for public attention and subsidy; and have an important educational and promotional role in bringing heritage to the notice of a global market.

## Arguments from Government

This mutually beneficial synergy in which tourism is seen as a potential solution to a serious heritage problem while heritage is viewed as a resource to be utilised as part of a solution to the tourism problem, raises numerous questions which we will mention below. However it is also regarded as a partial solution to a number of otherwise quite unrelated problems including local economic development, environmental conservation, the enhancement of heritage and cultural production as a social good, and even the enhanced local awareness, senses of place-identity, esteem, pride and well-being of local communities. In summary, 'grey' tourism' is seen to fit into a number of fortuitous symbioses as a result of the nature of its product, the characteristics and behaviour of its market, and the economic, social and spatial characteristics of its impacts.

Such arguments, and the expectations that they evoke, may be based upon over-optimistic and largely undemonstrated assumptions, but they explain the widespread interest in the blue-grey transition as a policy option whose likely implications can now be illustrated in the case of Malta.

## The Malta Case

Malta is a small densely populated Mediterranean island group, with a population of 390,000. It enjoys a relatively high level of economic development and resulting personal prosperity, with a GDP per capita of about half the EU average (Financial Times, 2002), and relatively high levels of educational and social welfare provision. Tourism was explicitly developed to replace the previous British military and dockyard functions which had been the leading economic sector. The Master Plan of 1963, anticipating the full British withdrawal, established objectives and aspirations which guided development until the Second Tourism Plan of 1989 expressed the first significant uncertainties and misgivings (Pollacco, 2003).

The development of beach resort tourism over the past 30 years in Malta has been extremely successful and now contributes between a quarter and a third of GDP and employment (Financial Times, 2002; Mangion, 2001). Visitor numbers rose dramatically from 23,000 in 1963, 98,000 in 1967, 334,000 in 1975 and reached one million in 1992 and a peak in excess of 1.2 million in 2000. It has occupied a modest but central place in the more general growth of the Mediterranean as a destination for beach/ climate dependent, largely inclusive package holidays (Williams, 1997). It has a clear and recognised popular image and reputation, and well developed organisational links

especially with the British package tour market. This very success and strong associations with a specific holiday type, destination and market might be assumed to generate a reluctance to engage in radical change and difficulty in effecting such change.

However doubts began to be voiced in the consultants' report that preceded the Second Tourism Plan of 1989 (Horwath and Horwath, 1989) and even before peak numbers had been achieved; following earlier questioning voices (Pollacco, 2003). An over-dependence upon a single national market, and within that upon a small group of tour operators, raised a fear of vulnerability to external changes and the dominance of the lower and price sensitive end of this market was leading to declining hotel occupancy rates (from 90% in 1967 to under 50% by 2002) (Pollacco, 2003), shrinking profit margins and ultimately unmatchable competition from lower cost destinations elsewhere. At the time of the Second Tourism Plan (1989) these were just uncomfortable misgivings which could be assuaged by policies for some product and market diversification and stimulation of accommodation upgrading. Desirable hotel upgrading has subsequently occurred, as discussed below; however it has exacerbated not only the occupancy rate decline but the appropriation of tourism infrastructure by global corporations beyond local control.

It would be a further 13 years, in which little fundamental change occurred, before a vague awareness of possible threats became a conscious concern for likely serious future problems and words such as 'saturation', 'at a crossroads' and 'end of a product life-cycle' (Pollacco, 2003: xv) became common. This formed the context within which the Malta Tourism Authority launched its Strategic Plan of 2002 to radically shift the emphasis from the 'island of sunshine and history', the slogan from the 1960s describing a product in which heritage was only a backdrop to the resort holiday and occasional excursion destination, to 'island of history and sunshine' in which heritage was to be the dominant product and sunshine the incidental accompaniment.

## Implications of the blue-grey transition in Malta

## Market Diversification and Upgrading

It is assumed that the heritage tourism market is more diverse in its interests, holiday type and national origins than the existing resort tourism. It is also assumed to be higher spending and possibly better spread throughout the year. The UK market, which still accounted for just over a third of the total in 2001, would be increasingly supplemented by other West Europeans (especially from Germany, France, Italy and the Benelux countries in that order) and markets beyond.

Additionally it is assumed that heritage would encourage the growth of quite different tourism markets. The potentially most important of these is the cruise

market, which had expanded from 57,000 visitors in 1990 to 259,000 in 2001, with an additional 35,000 excursionists using the fast sea link to Sicily (MTA, 2002b). The average length of stay of such visitors is less than 9 hours but they are a potential market for excursions to heritage attractions and are relatively high spending on local goods and services other than accommodation. There are other markets that are related to tourism which are likely to benefit from the contribution of heritage to place image and enhanced built environmental amenity. These include English language schools with a current enrolment of around 60,000 and second homes or retirement migration encouraged here by historical links, cultural familiarity and even previous tourist satisfaction. Although the expenditure patterns of retirement migrants is different from those of conventional tourists, they do provide a base of off-season support for many cultural facilities used by tourists.

## Change in Visitor Characteristics and Behaviour

The average length of stay of blue tourists is notably high being a one or two week booking in a single resort hotel. Malta's current average is 9.5 days. 'Grey' tourists however rarely stay in one location for more than 1 or two nights, within a holiday tour that can be much longer.

In general the two dominant age groups in heritage tourism are the child free over 50s and the backpacker youth market, whereas conventional Mediterranean 'blue' tourism tends to also attract the intermediate age groups and families with children. However Malta appeals to a relatively older market and is perceived as less suited to family beach holidays than many other Mediterranean resorts, and indeed along much of the coast, (with a few exceptions, notably of Marsaxlokk and, on Gozo, Marsalforn and Xlendi) lacks the sandy beaches popular elsewhere. Almost two thirds of current visitors are in the age group 45-54. This skewed age distribution, untypical of Mediterranean beach tourism, may be advantageous for policies encouraging heritage tourism. The 'grey' market, in age terms, is itself growing, especially in Western Europe, and it is this market that 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 products.

However, if Malta appears to have an inherited advantage in attracting the older age groups, it has a corresponding disadvantage in the heritage-orientated backpacker niche market which would require the development of inexpensive, backpacker bed and breakfast provision, especially in Valletta, and the use of the island-wide public bus system. This would aid diversification, nurture a future clientele, help the better utilisation of Valletta's residential stock and contribute to its evening animation. However it might also not be comfortably accommodated alongside the older heritage and cruise markets and its possible association with the image of a youth beach/disco/club culture, currently

prevailing in some other parts of the Mediterranean as well as in some parts of the Maltese resorts, may be damaging to attempts to shift into a more profitable and inevitably dominantly middle-aged heritage tourism market that has little demand for, and may be repelled by, such youth holiday activities.

Finally beach resort visitors have greater loyalty to particular destinations, and even individual hotels, than heritage tourists. It can be argued that the more unique the experience, the less likely is a repeat visit while conversely the more generic and less place-specific the holiday experience, the more likely it is to be repeated. Heritage tourists are collecting sites and experiences that are distinctively special and thus move on promptly to the next 'Michelin star' experience. The current beach market is notably loyal with almost half the UK visitors repeating a visit to Malta. Heritage tourists are more fickle and fashion prone and this market needs therefore to be either constantly extended to new groups or existing visitors re-attracted by new products.

## Change in the Spatial Distribution of Tourism Development

A characteristic of 'blue' tourism development, especially marked in Malta, is its spatial concentration. A single, almost unbroken, linear strip of about 10km extends along the north west coast from Sliema to St Paul's Bay (through Marsamxett harbour, Msida, Lazaretto Creek, Manoel Island, Tigné Point, St. Julian's Bay, the Malta Hilton and Westin Dragonara complexes, the Paceville night entertainment district, St. George's Bay, the Corinthia and Radisson complexes, Qawra on Salina Bay, with Sunny Coast and Sun Crest hotel developments to Bugibba and finally Xemxija Mistra Holiday Village). As the names imply, this strip has been recently infilled with global corporate luxury hotel complexes which also continue to elevate the skyline by redevelopment of previously built-up seafront (as Le Meridien on St.Julian's Bay). Outside this dense linear development there are only limited resort tourism developments such as on the south-east coast (Marsaxlokk), south-west coast (Ghar Lapsi and Ghajn Tuffieha), north coast (Cirkewwa and Armier Bay) and on the island of Gozo (Marsalforn and Xlendi).

Compared with the concentration of the blue resorts the heritage resources of a potential grey tourism are more widely dispersed through the two islands. The remarkable richness of heritage legacy, with three existing and one pending world heritage site inscriptions, includes historical artefacts, sites and associations from the prehistoric to the twentieth century. There is a wealth of extremely varied structures, events and personalities from which heritage tourism products could be shaped.

Valletta, a compact walled city in its Sceberras Peninsula setting between Marsamxett and Grand Harbours, is the core of any Maltese heritage tourism product portfolio. Its dramatic gated entry; partially pedestrianised spine of Republic Street / Kingsway / Strada Reale, small pjazzas (San Gwann/ St John's

Sq, Victoria/ Republic Sq.); and, most especially, its viewpoints over the harbours (St John's and St Michael's bastions, from the 'Siege Bell', the Upper and Lower Barrakka Gardens) create a remarkable ensemble with a direct and immediate appeal to visitors (Ebejer & Cutajar, 2001) and can be strongly associated with the two dramatic sieges (1565 and 1940-3) which create a eminently marketable heritage tourism product on foreign markets.

This product is supplemented by the 'Three Cities' on the opposite side of Grand Harbour, namely Vittoriosa (Birgu) the original settlement of the Knights of St.John (responsible for the construction of Valletta and much of Malta's identity), Senglea (L-Isla) planned in the 1540s, and Cospicua (Bormla). The heritage potentials of the interior have been somewhat overshadowed by the Grand Harbour heritage sites but spectacularly include the walled cities of Mdina, the old capital, and Victoria on Gozo. Elsewhere in the interior there are so many historical sites from the Neolithic (such as the temples at Ggantija), through the period of the Knights to British nineteenth century military architecture that the heritage potential is enormous and at present weakly realised. The wealth of resources and their wide spatial dispersal necessitates both a selection focussed upon specific themes appropriate to the desired markets and the creation of product packages and spatial networks. The abundance available to satisfy the capricious demand changes of 'grey' tourism markets is however compromised by the maintenance problem of the physical resources involved.

## Change in Tourism Infrastructure

The steady 30 year growth in visitor numbers from the mid-1970s to the mid-1990s was accompanied by a commensurate expansion of available hotel beds, whose total now stands at about 50,000 with an additional 10,000 in the planning process (Mangion, 2001). The transition to a heritage based tourism is expected to both ameliorate some of the currently perceived problems of this sector but also to make its own demands upon it. Concern for an oversupply in accommodation, leading to a decline in occupancy rates, price competition and consequent decline in profitability, has long been voiced (Pollacco, 2003) and policies for reducing the total available beds to around 38,000 (Mangion, 2001), encouraging an upmarket drift by upgrading facilities and reducing the number of 3 star and below premises is part of the Strategic Plan (MTA, 1999). This requires however both private investment and a change in the preferences of holidaymakers. Heritage tourists, at least in the older age group, favour short stays in quality, including specifically heritage hotels, accessible to the heritage sites. In short the problem with the existing accommodation supply is not in its quantity but in its nature, quality/price category and particularly location. Hotels of international quality have indeed proliferated but only one is in Valletta, one in Mdina and none are yet in the 'Three Cities'. Even the current 'grey' conferences may be accommodated in 'blue strip' hotels.

Secondly, as well as accommodation tourists require transport and it can be argued that heritage tourists require both more and different transport than beach resort visitors. 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 and even a single hotel. Little transport is required during the holiday. Heritage tourists are just more mobile. Despite the major concentrations of heritage resources in the inner areas of the towns and cities, many heritage sites are relatively remote and spatially dispersed throughout the islands. Also the length of stay for excursionists to Valletta is 4-6 hours (Mangion & Trevisan, 2001) and stay at any single museum, building or site is better measured in minutes than in hours and few generate return visits. The implications of this are that sites and attractions need to be combined within larger packages that form spatial networks and consequently require transport. The pursuit of policies for enhancing the existing blue 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 not least because the current developed resorts are physically separate from the main heritage concentrations at Valletta and around Grand Harbour. The simple point is that the desired transition within tourism is both dependent upon the existence of suitable transport, without which it is unlikely to happen, and will contribute, if successful, to an increased demand for transport. Unfortunately there is an existing serious road transport problem in the north coast urban region contributing to serious congestion, delay and air pollution. Alternative public transport by rail or ferry either does not exist or is currently underdeveloped.

Thirdly, tourism of whatever type requires other supporting catering, entertainment and shopping facilities. The heritage tourism market in particular can be combined with high quality or speciality retailing, often inspired by local handicrafts and delicacies, a locally distinctive gastronomy and varied cultural, entertainment and night-life activities. All of these are weakly developed in Malta compared with many of its competitors. Retail spending by tourists is currently relatively low (Mangion & Vella, 2000:18) and Malta is not regarded as a significant speciality shopping destination. Its gastronomy cannot compare with its neighbours (Caruna Galizia, 1999:6) and its existing arts and entertainment facilities are dominated by cinemas and casinos catering to the existing beach resort market. The composite of Mediterranean food, wine, folklore and just a relaxed 'latin' life style, that is a perceived enhancing characteristic promoted by much of the rest of the region, and especially important in the heritage tourism package, is developing but still barely evident (Ioannides and Holcomb, 2001). The opportunity for heritage motivated tourists to supplement their day-time visits to sites and museums with evening cultural, social and gastronomic experiences, preferably

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within an urban historic environment, should be provided by the compact, historic city of Valletta. Its recent failure to perform this function is a result of the current location of tourist accommodation, and thus evening entertainment, in the north coast resorts and the decline in the inner city residential population which together resulted in a city largely deserted in the evening.

## Managing Product Change in Malta

Having highlighted some of the changes that can be expected to result from the transition from blue to grey, the next question is how is it to be done and in particular what can the Maltese authorities themselves do to effect such change. The short answer to this question is that you change the product, the market and the links between the two but it is the first upon which policy should initially be focussed because until the product and its supporting services exist then there is nothing to market. Additionally it is changes in the product and the infrastructure that can most effectively be influenced by local intervention.

The characteristic behaviour of heritage tourists, as outlined above, requires two main reactions in the creation of the heritage product. First, the creation of distinctive, marketable heritage packages that satisfy the pre-structured expectations of visitors from the wealth of resources available and secondly, a rapid continuous extension and differentiation of these heritage product lines in response to the short stays, non-repeat experiences and rapid shifts in fashionable tastes of heritage tourists. The development of distinctive heritage products depends upon selection in time, from what in this case is advertised as '7000 years of history', and concentration in space. The first is a task of interpretation and packaging; the second involves more general spatial planning and management. Despite the length of its historical experience and the wealth of historic artefacts, Malta has been able to focus most effectively upon the dramatic narrative and personalities of the two sieges (1565 and 1940-43), both of which are important for shaping Maltese identity and for associating the locality with a wider world and therefore evoking an immediate response from many visitors but also, it should be remembered, being dissonant to others (Pollacco, 2003:73). In spatial terms the heritage product can be categorised as Valletta, the Three Cities and the rest.

## Valletta

Valletta is both the main heritage product, the 'tourist-historic city', and inevitably must contain most of the attractions and facilities that form the 'enhanced heritage tourism package' for day-time sightseeing, museum visits and speciality shopping excursions as well as night-time catering and entertainment. The close-built, compact and contained morphology of the city, together with its peninsula site and accompanying water vistas provides an ideal general atmospheric backdrop to heritage tourism activities. Additionally and unlike most historic cities, Valletta is a planned creation of a single time

period, the mid-sixteenth century, which contributes an architectural, morphological and historical coherence.

However there are four aspects of the city in need of attention, each of which is a local reflection of a more universal problem in planning urban heritage, and each of which requires management approaches that extend far beyond the needs of tourism. First, the reuse of historic buildings, especially massive structures, poses special difficulties. Valletta has not only the walls, gates and bastions of a fortress town but also the Fort St Elmo complex at the end of the peninsula and a number of very large buildings, such as the various 'Auberges' of the Knights and their main hospital, the Sagra Infermeria, of 1574. Government and other office functions make use of some of these, as do galleries, museums and conference facilities but the supply far outruns the possibilities for effective, and economic reuse.

Secondly there is the need to achieve a critical spatial concentration of tourism facilities and conversely avoid the spatial and functional disruption of empty or incongruous spaces. There is an effective clustering of daytime shopping (Republic St), market (Market St), cafes and tourism services. A problem is the lack of similar critical mass of evening functions. There is also the problem and missed opportunity presented by a number of major vacant or underused sites at critical locations which disrupt tourist circulation and the visual impression, notably the ruin of the former Royal Opera House dominating the entrance to the city, and St George Square /Misrah San Gorg, its largest public open space: both are currently used for surface car parking.

Thirdly, there is a clear link between evening animation and the existence of an inner city residential population that supports such activities. The decline in the residential population of Valletta is only part of a wider problem of depopulation of the inner areas of historic cities which in Malta has been viewed as 'a major threat to their vitality and viability' (Chapman, 1999: 268). The combination of decreasing residential numbers, weak inner city gentrification, a deficiency of inner city hotel accommodation, poor public transport accessibility and the absence of evening facilities and events, has created the problem of evening animation. It will require an equally diverse range of policies for its solution including the encouragement of an area-selective gentrification, the strengthening of the local market for evening entertainment, improvement of public transport as well as the encouragement of evening functions through land-use planning and the promotion of evening events (such as the October 2004 'Historic Cities Festival') and facilities amongst tourists.

## The 'Three Cities'

The principal current tourism function of the 'Three Cities' is to provide the visual closure to the view from the eastern side of Valletta rather than receive visitors. The area suffers from the three related difficulties of poor accessibility

both to and within it, the absence of promoted heritage sites in comparison to elsewhere and a negative image for many visitors resulting from its dockyard and industrial sites. However it is the possibilities presented by this increasingly abandoned historic dockyard and associated sites and structures that offer opportunities for heritage tourism developments that are beginning to be realised. In Vittoriosa, these include the potential adaptation to new functions of the extensive and currently underused fortress of St Angelo, the Cottonera Waterfront Regeneration Project, which involves a combination of restoration and new building (albeit a contentious global capital intervention, McCarthy, 2004) and the revitalisation of the city gate complex, including the 'Malta At War' Museum. Senglea offers the presently unrealised potential for heritage development as both precursor and 'second Valletta' product. Dockyard Creek is beginning to mirror historic naval waterfronts elsewhere, with the Maritime Museum and proposed further leisure reuse of former British and Knights buildings. The Cottonera defence works and their associated bastions and gates offer a formidable challenge through the sheer extent of the building work, the enormous costs of restoration and the equally enormous potential for quite spectacular tourism development, including the possibilities of a series of linear tourism walking or riding routes along the lines with interesting views, impressive gated entries into the Three Cities and a reuse of the extensive internal spaces that would become available (Trevisan, 2002). Fondazzjoni Wirt Artna, a heritage NGO, has made a brave start with a current gate restoration.

## The Rest

The heritage tourism development of the interior poses the intrinsic difficulties of access and interpretation of heritage assets that are both very varied and highly dispersed. Many are archaeological sites, such as the prehistoric 'temples' at Tarxien, Hagar Qim, Mnajdra, and Ta Hagrat, the bronze age village at Borg in-Nadur and the Hypogeum at Hal Saflieni. These present problems of access to and within the sites as well as the visitor management and interpretation of archaeological heritage. Promoted heritage trails are a common technique for imposing a thematic unity and a networked package upon diverse and scattered attractions. The 'Countryside Walks' initiative of the MTA since 2002 is one such attempt to open up some of the heritage of the interior to tourists, though the warm climate and minimum shade limit their use to the winter months. However with a few exceptions (such as the Fontana Craft Village, Gozo) the interior is typified by scarce tourism accommodation, interpreted sites or other facilities. Even the centrally located and potentially heritage rich town of Mdina/Rabat functions primarily as a short heritage excursion stop and little disturbs its epithet as the 'silent city'.

## The Transport Links

What can be termed the 'Malta Urban Region', namely the linear development extending from the 'Three Cities', through Valletta/Floriana, Msida/ Sliema

to St. Julian's, has a growing transport problem regardless of current tourism which would be exacerbated by additional travel between the north-west coastal resort complexes and the social, cultural and heritage facilities concentrated in Valletta, Grand Harbour and the 'Three Cities'. In particular the physical configuration of coasts, harbours, and peninsulas raises the question of the transport of visitors over, under or around the water barriers. Public ferry services, (the Sliema-Valletta ferry) and gondola-style water taxis (djhajsas) are currently weakly developed, though the 2004 Historic Cities Festival stimulated djhajsa use to access events staged in the Three Cities. Action could include the revival of the water taxis across Grand Harbour, the introduction of a public water-bus system, or even the ambitious (though recently stalled) 'Connections' scheme which proposes a ferry from the 'Three Cities' across Grand Harbour and then under the Sceberras Peninsula in a tunnel to Sliema across Marsamxett Harbour. All of these would provide both accessibility and be tourism attractions in themselves. While the northern urban region has the most pressing need for transport development, the widely dispersed, and often relatively isolated heritage sites of the interior and Gozo need incorporation through transport into a feasible network.

## Conclusions

Three more generally applicable concluding points should be made.

First, a transition that has such obvious advantages is equally obviously attractive to other similar destinations. Indeed much of the Mediterranean is currently investigating the possibility of combining heritage with beach tourism and thereby moving 'upmarket', reducing many of the costs of tourism impacts, while maintaining or increasing revenues and reaping various other benefits to the maintenance and promotion of cultural sites, artefacts and events. Similar policies have been or are in process of, implementation in Spain (Priestly, 1995), Turkey, both parts of Cyprus, (Mansfeld & Kliot, 1996; Akis & Warner, 1994; Lockhart & Ashton, 1990; Lockhart 1993) Greece, Israel, the Croatian coast of former Yugoslavia, parts of North Africa, especially Tunisia, and farther afield among the Caribbean islands and, notably, Bermuda which shares a number of insular, historic and tourism characteristics with Malta (Tunbridge, 2002; 2003). This is likely to intensify competition between destinations, even in the context of a market for such place-specific tourism, whose continuing growth is widely predicted.

Secondly, a blue-grey transition can be based upon three different desired futures. There is the 'substitution scenario', in which there is a deliberate, centrally directed, shift from beach resort tourism to heritage tourism. This is the most innovative, radical and promising long-term scenario which incurs the costs of abandoning past success and writing off much of the capital investment in real estate as well as human investment in skills. The 'parallel

development scenario' envisages the development of a separate market alongside but substantially different from the existing sea/sun tourism market. This requires that a new set of products served by new facilities for new markets would need to be developed and promoted alongside but quite differently from those currently on offer and marketed to quite different customers. Finally, the 'supplementary scenario' adds heritage attractions to the existing beach resort tourism. This requires only marginal extra investment and capitalises on the existing established markets and accommodation locations. It does little, however, to attain the economic, cultural and spatial benefits that were the original reason for the transition.

Finally it is clear from the Malta case that the blue-grey transition may be motivated by concerns about the present and future of the tourism industry but its implementation necessitates measures in cultural policy, heritage management, transport, housing and indeed urban planning in general. It also has consequences for all these fields. It may be that heritage tourism by its nature is more deeply embedded in other aspects of government policy than is the more spatially and functionally encapsulated, often enclave, resort tourism. It therefore requires bodies and agencies capable of operating on such a wide canvass, with suitable administrative instruments and political responsibilities. Small island states, like Malta, may have advantages of administrative coordination and political will in this respect, but such advantages and agencies simply do not exist in some of them and in many other regions; the question 'who is to do it?' remains the most important and often cannot be confidently answered.

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## *About the authors*

**Gregory Ashworth** is Professor of heritage management and urban tourism in the Department of Planning, Rijksuniversiteit Groningen, Netherlands. His teaching and research interests lie in the fields of heritage management, tourism management and place marketing, all within the context of urban planning and development.

**John Tunbridge** is Professor of Geography in the Department of Geography, Carleton University, Ottawa, Canada. His teaching and research interests lie in the fields of heritage and tourism management within the contexts of urban, social and political geography.