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Developing the Gozo Tourism Product - A Strategic Approach

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Introduction

Effective marketing requires the development of a consistent image of a tourism destination. This paper considers the most appropriate image for Gozo would be that of Green Gozo, and justifies this approach on the basis of different aspects of the Gozo tourism product.

The Gozo Tourist Product

In deriving a strategy for tourism, a proper understanding of the tourism product is required. An analysis of urban and rural Gozo reveals certain characteristics which make the island distinct and of particular interest to the visitor. The following discussion is limited to the physical or tangible product and does not discuss issues related to "intangibles" (service, activities, events, etc.).

Gozo is characterised by a single major settlement at the centre of the island (namely Rabat/Fontana/Munxar) and a number of smaller settlements "scattered around the island". Rabat is unique in the experience it provides to visitors. Visitors can enjoy views of large parts of Gozo from the Citadel or walk in the historic streets of the old town (around St. George's church). The Citadel also includes Gozo's more important museums. Being the main centre, Rabat contains a mix of commercial and social facilities to cater for the island's needs, including restaurants and shops.

Apart from Rabat, there are several towns and villages which provide interesting urban cores. Some of the settlements are located on high ground (namely Xaghra, Nadur, Qala), providing opportunities for belveders and for the enjoyment of open views of the countryside. At the west end of the island, settlements are located in plains or valleys, and are surrounded by gentle hills (namely Gharb, Ghasri, San Lawrenz), giving idyllic scenic views of small traditional villages surrounded by greenery. The west is the area where the countryside has been least subject to interventions (even if there are a number of quarries around Dwejra). The west also includes two very important tourist sites: Ta' Pinu Church and Dwejra.

Gozo countryside provides tourists with an opportunity to escape from the daily routine to a quiet, peaceful and green ambience. Gozo is perceived to be greener than Malta for a number of reasons. The proportion of built-up areas is smaller in Gozo than in Malta, and the countryside has been less subject to interventions. There is clearly ample scope for countryside walks and other activities involving the enjoyment of the countryside. The flora and the landscape diversity in certain areas are unique to Gozo.

The feeling of open spaces is more prevalent in Gozo than in Malta largely because towns and villages have not coalesced with one another. An ever-present element in the Gozo countryside is the Citadel, which is highly visible from most of the island. The south-east of the island is the most urbanised part of Gozo outside Rabat. It largely consists of an axis connecting the main entry

point to Gozo, the Mgarr harbour, to the main commercial centre Rabat. In terms of tourism product, this road is the least typical of Gozo. It gives first-time visitors the impression that Gozo is as urbanised as parts of Malta.

Apart from the general urban and rural environment, the Gozo product includes specific tourism sites or visitor attractions. The more important ones are Ggantija Temples, Ta' Pinu and Dwejra. The coastal views at Dwejra are, to say the least, spectacular, whereas the religious significance of Ta' Pinu is sufficient to justify pilgrimages to the shrine. There are other sites worth a visit, including ones run by the private sectors. The itinerary of a day tour to Gozo consists of a selection of these sites. There needs to be more commitment towards the proper maintenance and interpretation of the more important heritage sites and museums.

Then, there are of course the seaside resorts of Marsalforn and Xlendi. Clearly these are an important part of the tourism product primarily because they are the focus of leisure activity during the summer months. Unfortunately, development in these seaside resorts was not properly controlled, with same development being incompatible with the context within which these resorts are located.

Agricultural activity provides opportunities related for agro-tourism, including wine production and tasting, fruit picking and so on. EU funds are being used to improve and upgrade agricultural activity and where appropriate to establish agro-tourism attractions.

Diving is an industry which has developed well in Gozo and clearly offers potential for further growth. Many divers associate diving in the Maltese Islands more with Gozo than Malta. Other water sports facilities are located in Marsalforn and Xlendi.

Cultural activities in Gozo have received a boost in recent years, not least because of the Mediterranean Festival. Culture has an important role to play as it provides overseas tourists with more things to do when in Gozo. Lace making and glass blowing are two crafts which provide an added attractiveness to the Island.

Characteristics of the Gozo Tourism Industry

The tourism industry is different from that in Malta, because:

1. Gozo offers a different product largely because its countryside and coast have been less subject to degradation. It is more peaceful and it has greater potential to provide a relaxing holiday, close to nature and "away from it all". Because of the size of the island, the "sea" dimension is ever-present, even during the winter and off-peak months.
2. Gozo is less accessible to the overseas tourist. This aspect is evidently a disadvantage in that it increases travel time and makes travel arrangements less reliable because of possible disruption due to weather conditions. Gozo's detachment is also in a sense an advantage, in that it makes Gozo more of a special and exotic place to visit. Reduced accessibility makes it less of a mass market destination.
3. Gozo benefits substantially from domestic tourism with thousands of Maltese crossing over to Gozo especially over long weekends in Easter and the summer.

More specific characteristics of the Gozo tourism are:

- The tourism industry in Gozo is highly seasonal, resulting in very low occupancy rates and some of the hotels not operating in the winter months.
- Domestic tourism to Gozo tends to peak at specific times of the year, creating pressures on the infrastructure. Overcrowding at tourist attractions and leisure areas degrades the tourist experience in Gozo.
- The number of day visitors to Gozo is significant. The income derived per capita to the Gozo tourism industry by day visitors is marginal, especially when one considers the pressures on the sites visited.
- There is no flexibility in the organisation of day tours- all arrive and leave at the same time. Inevitably this creates crowding and pressures at peak times.
- The internal public transport system in Gozo is inadequate, making it difficult for tourists to move around (unless they hire a car).
- There is an excessive dependence on private car use by Gozitans and by Maltese visitors to Gozo.
- The impact of cars on the urban centre of Rabat is excessive largely because all traffic to Xlendi has to pass through Pjazza San Frangisk.
- Museums and archaeological sites in Gozo are poorly presented.

- Pressures of development could, if not properly managed, result in a degradation of Gozo's main asset as a tourist product, namely its countryside and coast.

Considerations for Deriving a Tourism Strategy for Gozo

A tourism strategy is to be derived on the basis of the potential and strengths of the product offered. The product offered by other destinations, including the Island of Malta, is also relevant. This implies that in deriving a strategy one needs to identify those strengths of the Gozo product which Malta can only offer to a lesser degree. This approach will enable the product offered by Gozo to be complimentary to that of Malta, rather than in competition.

The difficulties in travel to Gozo imply that Gozo can be less dependent on mass tourism. In a sense, this is positive in that the deficiencies and difficulties which Malta's tourism industry faces, namely excessive dependence on tour operators, could be averted. On the other hand, generating sufficient numbers of international tourism flows to Gozo is difficult and is only achievable in the medium- to long-term.

Hence the importance of identifying niche markets which could give potential clients the incentive to make that little extra effort in travelling to Gozo. Clearly, diving is one such niche market, but there needs to be more if the tourism industry in Gozo is to be sustainable.

Potential weaknesses of the product should also be taken into account. There are specific aspects of Gozo which mitigate against a green strategy and which therefore would require addressing if this approach is to be adopted. In particular, the practice of bird hunting and trapping in the Gozo countryside is perceived in a bad light by most tourists. Moreover, illegal practice of dumping in the countryside needs to be addressed.

Proposed Tourism Strategy – Green Gozo

It is proposed that Gozo is developed and marketed overseas as a green destination. This involves providing visitors the opportunity to explore and experience the natural environment, in particular the Mediterranean landscape and coastline. It also requires a more human dimension to the experience through their interaction with the Gozo community.

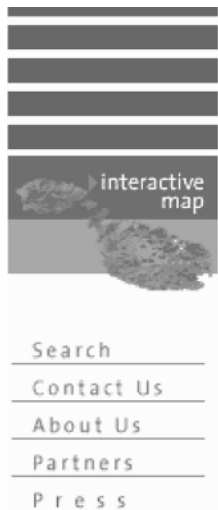
The justification for this approach includes:

- The current state of the tourism product (as described above) provides a good basis for the development of this niche market.
- The up-market tourism accommodations of 5* hotels and self-catering villas and farmhouses complements this approach.
- For a green tourism, reduced accessibility is less of a disincentive for tourists.
- Green tourism will generate flows during the winter and off-peak months, the time of year where significant increases are required to make the Gozo tourism industry more sustainable.
- Although there are other niche markets that could be explored, green tourism is the niche market in which Gozo can compete most effectively against other destinations (including Malta).
- EU funding provides new opportunities to invest in agro-tourism.
- Diving, which could be an integral part of an eco-branding, is already well developed in Gozo.

The implications of this approach are an appropriate balance between the needs to protect the environment and the assets of the Gozo tourism product with the need to invest and develop economic and social facilities.

More specifically this signifies:

- The establishment of countryside footpaths including printed information to go with it .
- Investments in tree planting and landscaping projects.
- The establishment of a botanical garden (possibly at Villa Rundie) and the use of green open space in public property for leisure (for example at Tal-Imghajjen next to football ground on road to Rabat).
- The upgrading of existing belveders and the establishment of new ones along the periphery of towns and villages.
- More effective management of the Gozo countryside, including regular cleaning and enforcement.
- The use of farms and vineyards to create a more authentic rural experience.
- The improvement of access (for people and not vehicles) to various "pocket" sandy and rocky beaches along the coastline, whilst safeguarding the natural environment.
- The provision of more sites for diving, including marine conservation areas as well as the improvement to access for divers to the water.



Land Sports

Countryside & Walks

Countryside Walks - internet presentation at www.visitmalta.com

Over the past few years, various initiatives have been taken to improve the Gozo tourism product which are in-line with promoting Gozo as a green destination.

The Ministry for Gozo and the Malta Tourism Authority have published two countryside walk booklets, namely Ta' Gurdan and Dahlet Qorrot countryside walks. Apart from information on the various sites to see, the booklets provide sufficient information to enable the visitor to follow the walks without any other assistance. The booklets are very user-friendly and include colourful photographs. The booklets are also available in German. Other walks are currently under preparation.

The Malta Tourism Authority has also assisted a number of Gozo local councils in landscaping and embellishment projects. An important addition to the Gozo tourism product is the new garden at Nadur to which MTA has contributed financially. Visitors can enjoy spectacular views of the Comino channel and the countryside surrounding Nadur. Another important project to which MTA has contributed is the landscaping around Ramla Bay carried out by the Gaia foundation. Apart from stabilising the clay slopes, the landscaping provides a greener surroundings to Gozo's most popular sandy beach.

Conclusion

This paper considers different aspects of the Gozo tourism product and concludes that the development of a green image for Gozo would be appropriate. The development of Gozo as a green destination does not preclude from its current role in domestic tourism.

The development of Gozo as a green destination is considered to be beneficial to Gozo hoteliers and tour operators in the medium- to long-term. It aims at exploiting the potential offered by the island during the winter and off-season months, whilst strengthening the high season with enhanced tourist attractions and facilities.