

## New Directions in Mediterranean Tourism: Restructuring and Cooperative Marketing in the Era of Globalization

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### **Abstract:**

At a time when tourism is the preeminent global industry, the Mediterranean is one of the most important tourist regions in the world, accounting for approximately a third of total tourism revenues and half of international arrivals. Because the traditional sun, sand, and sea tourist product of the Mediterranean is experiencing a crisis with subsequent market shifts toward other regions and alternative tourist products, the region has begun to lose its share of the international travel market. The time is ripe for the 21 Mediterranean countries to evaluate their tourist industries in the context of sustainable development strategies, begin to consider restructuring their industries to increase efficiency and competitiveness, and form strategic alliances for cooperative marketing efforts in order to maintain a competitive edge in the global tourist market at the threshold of the third millennium.

### **Article:**

#### **INTRODUCTION**

At a time when tourism is the leading global industry, the sociocultural, economic, and bioclimatic heterogeneity of the 21 Mediterranean countries have transformed the area into the most important tourist region worldwide, accounting for approximately one third of total tourist revenues and about 40% of international arrivals. Because the tourist influx is mainly concentrated on the coastal fringe and has significant impacts on life chances and welfare, values and attitudes, cultural manifestations, and natural resources — and also because the traditional beach holiday is experiencing a crisis with subsequent market shifts toward other regions and alternative tourism types—the time is ripe for the Mediterranean to initiate efforts to redefine its tourist product. Although each Mediterranean state traditionally has viewed its tourist product as competing with that of neighboring states, Mediterranean countries will need to regard their traditional competitors as “partners” in regional collaboration in order to secure a stronger position in the global tourist market in the coming years. This article—the first of six focusing on Mediterranean tourism in this special issue of *Thunderbird International Business Review*—examines some of the current challenges faced by the region and discusses possible alternatives to current marketing and management methods within the tourist industry.

#### **THE MEDITERRANEAN AS TOURIST DESTINATION**

The Mediterranean region<sup>1</sup> has been the cradle of western civilization where some of the world’s oldest cultures have developed, including the Arab, Byzantine, Carthaginian, Egyptian, Greek, Ottoman, Phoenician, and Roman. The Mediterranean Sea has served as one of the world’s chief travel and trade routes—as early as 3000 BC, Egypt attracted travelers interested in seeing the pyramids and sailing the Nile, the ancient Greeks voyaged to Phoenicia and the Black Sea in the east and to Sicily and Marseilles in the west, and journeys to spas, festivals, athletic contests, and sacred places were common. During Roman times, travel was encouraged further by an extensive road network protected by the military, while during the medieval period, the wealthy could travel to France, Italy, Egypt, and the holy lands. During the Renaissance, historical cities such as Istanbul, Genoa, Venice, and Barcelona served as centers of commerce and culture. During the 20th century, and due to changes in world trade relations and transport technology, the center of activity gradually shifted from the Mediterranean Sea to the Atlantic Ocean, leaving, by the 1950s, the Mediterranean with the relics of the past. At

that time, the Mediterranean landscape was transformed from the world's center of commerce and trade to a Mecca for tourism. Especially after the post-WWII emergence of mass travel, the richness of the scenery of its coastal environment, its mild climate, and its impressive cultural heritage turned the Mediterranean into a significant tourist draw. Today, the Mediterranean coast and its numerous islands constitute a prime destination for international tourists seeking antiquities, culture, history, sun, sea, sand, and fun.

Despite various setbacks<sup>2</sup>, global tourism, as the product of the post-WWII era, skyrocketed to 625 million international arrivals in 1998 from 14 million tourists in 1948 to become the world's preeminent industry, producing \$3.6 trillion of gross output and employing 225 million people worldwide (World Tourism Organization, 1990; World Travel and Tourism Council, 1997). The international patterns of tourist mobility have been polarized spatially with an overall dominance of Europe (albeit with a marked decline in recent years), a continuing increase in Southeast Asia and Pacific's share, and a recent decline in the Mediterranean (World Tourism Organization, 1999). Nevertheless, at the threshold of the 21st century, the Mediterranean region remains the world's prevailing tourist destination, accounting for approximately 40% of all international tourist arrivals and 30% of all tourist revenues (Montanari, 1995; World Tourism Organization, 1998). In addition, tourism represents 13% of Mediterranean countries' exports, 23% of trade in services, and employs over five million people (World Tourism Organization, 1996). Aggregate numbers of tourist arrivals in the 21 Mediterranean countries rose from 86 million in 1975, to 125 million in 1985, to over 200 million in 1990, and are expected to surpass 250 million by the end of the century (Grenon & Batisse, 1989; Jenner & Smith, 1993; World Tourism Organization, 1999).<sup>3</sup> However, the 40-year dominance of the Mediterranean region as a tourist destination has started to fade as it has begun to lose market share (World Tourism Organization, 1999) in favor of other geographic regions (i.e., Pacific, Southeast Asia).

## **CONTEMPORARY CHALLENGES AND POSSIBLE SOLUTIONS**

The gradual decline in the Mediterranean's tourist market is attributable to a number of factors: (a) the emergence of new geographic regions as competing tourist destinations and subsequent traveler shifts; (b) consumer need and search for alternatives (i.e., ecotourism, agrotourism, cultural tourism, water-based tourism) despite the enduring popularity of the traditional resort tourism model; (c) the Mediterranean's slow, uncoordinated, and often hesitant development of new tourist products; (d) seasonality—over 40% of tourist activity takes place between June and September (World Tourism Organization, 1999); and (e) sporadic regional political conflicts and terrorism (i.e., such as the ones in the Middle East, North Africa, and the former Yugoslavia). The foregoing factors have constituted some of the chief reasons for the stagnation of the Mediterranean's share of the traditional market (northern European travelers) for the past decade (World Tourism Organization, 1999). Consequently, the region has turned to long-haul travelers (from the United States and Japan), new markets (Eastern Europe and intra-Mediterranean travel), and niche market areas (i.e., cruise-line vacations) (Apostolopoulos & Sönmez, in press; Krandonellis, in press) to increase tourist arrivals. These efforts alone are insufficient; Mediterranean countries need to overcome the aforementioned challenges to guarantee future success. Efforts toward this goal need to consider two important issues. First, there is an imperative sociopolitical need for balanced tourism development in the framework of physical- and human-resource sustainability. Second, an expert-supported mandate for restructuring the Mediterranean tourism system as a whole—is not only necessary, but also almost inevitable for its sustained welfare (Apostolopoulos & Sönmez, in press).

### ***Sustainable Tourism Development***

The growing concern about environmental pollution during the 1960s and 1970s has accelerated in the 1980s and 1990s, focusing on balancing interrelationships between physical and social environments. Questions about the acceptability of the objectives, strategies, and policies of conventional tourism growth have entered public debate, and the concept of "sustainable development" has become well known due to the 1987 World Commission on Environment and Development report (also known as *Brundtland Report*, named after its president). Sustainable development, by "meeting the needs of the present without compromising the ability of future generations to meet their own needs" (World Commission on Environment and Development, 1987) provides the framework for integration of environmental policies with economic development strategies.

Mediterranean tourism must go beyond mere macroeconomic indicators; it must be a positive force for both environmental and human resources. Toward this direction, the fact that Mediterranean tourism is organized predominantly by third-country-based operators functions in a counteractive manner, as the priorities often are different. Therefore, the citizens of the region's countries should be involved actively in the tourism-planning and decision-making processes at a meaningful level. Tourism development alone without active grass-roots participation in the framework of sustainability would not be able to alleviate the chronic imbalances between the northern, southern, and eastern shores. In addition, even the development of collaborative alliances among the nations of the region would be ineffective and literally irrelevant if the ecosystem is damaged and human social patterns are alienated by inappropriate tourism development. Therefore, tourism policies should incorporate sustainability, as well as enhance culture.

### ***Restructuring the Mediterranean Tourism System***

From the 1950s through the early 1970s, there were relatively stable relationships in the broader contexts of production and consumption—constituting what is known as the Fordist regime of accumulation (Montanari & Williams, 1995). However, in the early 1970s, several inherent crises of the Fordist regime (exacerbated by the oil crisis) triggered major inflationary and recessionary problems, resulting in a revision of forms of accumulation. Furthermore, globalization trends linked to market and technological changes also affected the nature of production and consumption.

In the context of tourism, the dominant mode of production until the 1960s was the traditional model of mass tourism (representing a form of mass consumption). Mass tourism has been characterized by a standardized product-and-market domination by producers. In this context, there was the emergence of a state-supported sector along with the oligopolistic dominance of a few companies (primarily tour operators and airlines) and price (rather than the particularities of places) competition. But gradual shifts in consumer preferences and in production requirements led to a transition from Fordism to post-Fordism models of production and consumption—that is, to flexible systems of production and organization. Similarly, the consumption of services has also changed due to rapidly shifting traveler tastes and the emergence of niche markets.

In the Mediterranean context, the region should adhere to these broader changes in production and consumption of tourist services and provide the consumer of the tourist experience with innovative new products. Toward this direction, diversity in traveler preferences and proliferation of alternative destinations, diversification of vacation types, development of new destinations, growth of “softer” tourism forms, and interweaving tourism-related activities into regionally identifiable and differentiated tourist products constitute necessary dimensions for regional and local development.

Adherence to the principles of sustainability and restructuring will contribute to a positive direction for the Mediterranean tourist product, tourist industry, and tourist market. Subsequently, these efforts can boost employment, increase revenues, minimize social tensions, and ultimately lead to broader peace and stability in the region. Furthermore, such efforts will create the most appropriate background for achieving cooperation and forming alliances among the Mediterranean nations.

### **COOPERATION AND ALLIANCES AMONG MEDITERRANEAN COUNTRIES**

It has been recognized widely that the decline in the Mediterranean's market share will accelerate if it continues to focus on mass tourism. The region clearly must explore niche markets and practice focused market segmentation to maintain its strong position in world tourism. For a targeted marketing strategy, the Mediterranean tourist product will need to be reevaluated in terms of its price competitiveness, destination image, market position, added value, and product quality within the context of customer sensitivity and perceptions (Apostolopoulos & Sönmez, in press). Although the Mediterranean tourist product is unique and not subject to substitutability, it is vulnerable to the major tour operators' demonstrated power to sway travelers to other regions based on their and their customers' perceptions. For this reason, effective marketing research is an essential prerequisite for neoteristic marketing strategies, which involve marketing and promoting the Mediterranean region as a “single” destination or clusters of destinations (Apostolopoulos & Sönmez, in press).

Quite clearly, the entire Mediterranean region cannot compete with other destinations. Rather, subregions within the Mediterranean representing clusters of countries with similar characteristics and offering specific types of vacation experiences (i.e., Cyprus/Greece/Turkey; Algeria/Morocco/Tunisia; Egypt/Israel/Lebanon) can compete with other destinations outside the Mediterranean. A superficial approach to promoting the Mediterranean would not produce the desired results; in fact, it would be detrimental and a waste of collective efforts and funds. Various forms of promotion are effective and important; however, advertising alone cannot rectify a poor tourist product's deficiencies. For example, tour operators—the so-called “export/marketing arms” of nations for their tourist products—have found in their research that hotel comfort and service standards are paramount to a destination's attractiveness (Brackenbury, 1996). It is recommended that, in order to be successful, cooperative marketing efforts for the Mediterranean include the exploration of a spectrum of factors, such as urging the public and private sectors into cooperating on environmental protection and encouraging the public sector to upgrade its infrastructure (Kopp, 1996).

Traditionally, each Mediterranean state has viewed its tourist product(s) as competing with that of neighboring states (i.e., Greece with Turkey; Spain with Italy). For this reason, it will require a dedicated effort on the part of Mediterranean countries to regard their traditional competitors as partners in regional collaboration. Regional cooperation is not impossible—it is an endeavor requiring strong political will and common sense from tourism entrepreneurs. For example, cooperative promotion for the Cypriot, Greek, and Turkish product can stress aggregate tourism offerings and function as an immense competitive advantage not only vis-a-vis other Mediterranean states, but also vis-a-vis other competing regions outside the Mediterranean (Sönmez & Apostolopoulos, in press). In light of lower airfares, greater tourist affluence, and travelers' quest for more exotic destinations and exciting vacation experiences, any country or region with a warm climate offering beach-resort vacations (i.e., Caribbean, South Pacific) is in a position to compete with the Mediterranean, intensifying its declining share of world-tourist arrivals (World Tourism Organization, 1999). Due to the marked socioeconomic improvement of various Mediterranean countries, the region is no longer a low-cost destination for its traditional market of Northern Europeans. Considerable research will be necessary to attract new markets (i.e., United States, Canada, Australia, Japan), primarily to better gauge travelers' destination choices and decision-making behavior. Especially for long-haul arrivals from Japan and the US, travelers' perceptions of service quality and standards, price, destination image, as well as safety and security, need to be understood well.

Marketing the Mediterranean as a unified destination might be attractive to overseas tour operators as well; however, such marketing also must strive to maintain the uniqueness and brand image of each nation state. Numerous possibilities for multicountry tourist itineraries exist for the Mediterranean region. To carry out these functions, a Mediterranean marketing body could be modelled after the Caribbean Tourism Association, with an added advantage of a common heritage beyond simple geographic and natural links. Furthermore, it is feasible for the region to communicate a “Mediterranean brand” to potential travelers while cooperating to assure synergy and cohesion in other marketing functions (i.e., distribution, pricing, positioning). A brand strategy can inspire the private sector to develop comprehensive itineraries and therefore repackage Mediterranean vacation products. A good example of cooperative marketing is that of the European Union's (EU) strategy for its 15 European countries (European Union, 1999), which suggests that a generic image can be conveyed in marketing a rich and multicountry region to an overseas market. The EU example also is useful in pin-pointing problems of cooperative-tourism marketing. In Europe, the public-sector-initiated cooperative marketing efforts received luke-warm support from the private sector. The lack of support by the tourist industry and insufficient funding were identified as reasons for not achieving the expected benefits of cooperative marketing. One potential way to avoid repeating the same mistake in the case of the Mediterranean would be to tap into the EU's Mediterranean Development Aid (MEDA) program—established after the 1995 EuroMediterranean conference—for funds.

On the other hand, the private sector has expressed its concerns about marketing a generic Mediterranean product based on the premise that a geographic region would be difficult to brand (Zoreda, 1996). This concern may appear more serious in light of the fact that tourism marketers increasingly are focusing their strategies on

niche markets involving special-interest tourism for specifically targeted audiences. Fortunately for the Mediterranean region, numerous market niches can be addressed, such as religious, historical, sports, festival, and agricultural tourism, as well as countless architectural and archaeological attractions. The promotion of such diverse and rich resources, as well as alternative forms of tourism, which take advantage of regional peculiarities, undoubtedly can contribute to the future competitiveness of the Mediterranean. It should be remembered, however, that each country needs careful tourism planning to protect its physical and cultural resources to avoid monoculture. Planning decisions should respect the rights and nuances of different value systems and cultures of the region and reinforce and preserve special identity aspects.

Cooperative marketing is a complex process involving long-term strategic as well as tactical plans (Hill & Shaw, 1995). Numerous decisions, such as the nature of the advertising campaigns, the development and communication of a unified image, the nature of the cooperative marketing effort, the name and logo of the marketing initiative, and appropriate positioning in the world tourist market, are involved. To convey one image and one message, a representative name and symbolic logo would be required for the Mediterranean region. The choice of this name may be influenced by the existence of regional clusters, such as the northern Mediterranean shores (i.e., Spain, France, Italy), eastern shores (i.e., Turkey, Syria, Israel), and the southern shores (i.e., Egypt, Libya, Algeria). Examples of successful joint- and regional-marketing initiatives include tourist attractions/destinations shared by several countries, such as the Alpine states, the Maya route in the Central American states, the (proposed) Silk Road, The Amazonia, and The Andes. Other examples of successful cooperative marketing efforts include regional organizations such as the Middle Eastern and Mediterranean Travel and Tourism Association and the PROALA in Latin America.

The simple agreement by Mediterranean countries to participate in cooperative marketing would not guarantee a competitive edge for the region. A primary goal for the Mediterranean region would be to first identify, then convey its competitive advantages over competing destinations. It also is very important for cooperative marketing objectives to be clearly delineated, and representative of the needs of the participating countries, as well as of the region as a whole (Apostolopoulos & Sönmez, in press). Will the emphasis of cooperative marketing be to increase tourist aggregates, draw higher income visitors, or target new markets? Will efforts focus on traditional mass markets or promote niche vacations? Will cooperation constitute a political initiative to counterbalance regional inequalities? These and other relevant questions need to be answered collectively by the region's countries in order for cooperative-marketing strategies to be sustainable and successful.

## **ABOUT THIS SPECIAL ISSUE**

Over the years, travel and tourism have been transformed into the world's largest economic sector, with enormous ramifications for both the physical and human spheres of industrialized and developing nations alike. In the Mediterranean, where diversity and commonality coexist, tourism, as one of the leading economic sectors of the region, awaits the approach of the third millennium at the cross-roads of important decisions. In order to maintain and improve its status in global tourism, the Mediterranean region needs to reposition effectively its tourist sector in the continually shifting world arena. Toward this direction, the restructuring of its tourist product, industry, and market within the framework of sustainable development and through the establishment of strategic alliances (i.e., cooperative marketing, joint ventures) is crucial to the future prosperity of the Mediterranean. For any type of restructuring to have enduring success, however, the Mediterranean region also would have to overcome issues of political instability, terrorism, and religious fundamentalism, which have hurt Mediterranean tourism in the past.

Although it may appear difficult to draw general conclusions, Mediterranean tourism holds immense potential for further growth and development. A challenging but exciting road lies before Mediterranean countries in their quest for a strong and enduring place in world tourism. The commonality of problems reinforces the need for a unified effort to share resources, to undertake cooperative promotion, to exchange information, and to coordinate actions with-in regional cooperation. It would be a mistake to regard tourism simply as a business; instead, it should be viewed as a means by which to get to know and understand other peoples, and develop and maintain positive country images. In summary, the relationship between Mediterranean tourism, socioeconomic

development, and cultural change is contingent. Above all, it depends on the structure of the tourist industry itself and the nature of the local, regional, and national economy. There exists, therefore, enormous diversity of socioeconomic and cultural experiences in the Mediterranean, as the articles in this issue illustrate.

This special issue of *Thunderbird International Business Review* is intended to emphasize the Mediterranean's significant role in the world's preeminent industry, to discuss the future success of the region in an era of globalization and phenomenal growth in international travel and tourism, to share with readers the challenges faced by the region, as well as possible paths to resolve them through creative business strategies. In this issue, Mediterranean tourism is examined from the perspective of how the region can be repositioned effectively in the continuously shifting world-tourist market. More specifically, the articles in this issue focus on how cooperative marketing strategies may promote and enhance the area's tourist product, taking into consideration issues of natural- and human-resource sustainability, alternative forms of tourism such as wine tourism and heritage tourism, impact management, security and political instability, and tourism infrastructure. Contributions reflect perspectives of international business, planning, sociology, political science, and other disciplines and illuminate the dynamics and prospects of Mediterranean tourism.

Apostolopoulos and Sönmez's paper begins the special issue with an examination of the Mediterranean's tourist industry and possible reasons for the recent decline in the region's share of the international tourist market. They suggest the need for restructuring the tourist industry within the framework of sustainable development and initiating cooperative-marketing efforts among Mediterranean countries in order to increase the region's competitive advantage over competing tourist regions such as the Caribbean. In the second paper, Gray examines the political economy of tourism with a focus on North-African countries. The paper asserts that Egypt, Libya, Tunisia, Algeria, and Morocco have embraced, in varying degrees, tourism as part of their economic-development strategies and discusses possible strategic and developmental perils before North-African -tourism development. Diamantis, in the third paper, examines sustainable development and ecotourism practices in Mediterranean islands. In particular, he discusses such practices, as well as environmental trends, in the Balearic Islands, Crete, and Vis. Hall and Mitchell, in the fourth paper, explore wine tourism as an alternative tourism form. Using case studies from Italy, Spain, Greece, and Israel, the authors examine the relationship between wine production and tourism development, as well as the European Union's role in the use of wine tourism as a tool for regional development. In the fifth paper, Pechlaner explores another form of alternative tourism by focusing on the architectural heritage of the Mediterranean, with a primary focus on Italy. Pechlaner discusses destination management using cultural tourist products and services within the framework of cooperation in the region. Finally, Dieke and Karamustafa, in the sixth paper, examine cooperative marketing in the accommodation sector in the southeastern Mediterranean, with a specific focus on Cyprus, Greece, and Turkey.

**Note:**

1The Mediterranean basin is an almost enclosed sea covering an area of 3 million square kilometers. Twenty-one countries—the European countries of Spain, France, Monaco, Italy, Malta, Slovenia, Croatia, Bosnia Herzegovina, Yugoslavia, Albania, and Greece; the Asian countries of Turkey, Cyprus, Syria, Lebanon, and Israel; and the African counties of Egypt, Libya, Tunisia, Algeria, and Morocco—share its coastline, total-ing a population of 426.1 million (Central Intelligence Agency, 1999). The Mediterranean mosaic is a blend of eight main cultural and linguistic subsystems, three major religions, land areas ranging from the tiny island state of Malta (360 [sq. km.](#)) to Algeria's massive 2.4 million square kilometers, and populations that vary from Malta's 380,000 to Egypt's 67.2 million.

2The collapse and subsequent instability of eastern Europe, the Gulf war, the civil war in the former Yugoslavia, the financial turmoils in Southeast Asia, Japan, Russia, and Latin America and their subsequent sociopolitical impacts, periodic threats of international terrorism, and an overall fluid international state of affairs have been serious setbacks for the region's tourism.

3The Blue Plan and The Economist Intelligence Unit have outlined several possibilities for the development of tourism to the years 2000 and 2025, according to varying hypotheses for economic development. By the year 2000, it is estimated that arrivals in the 21 countries could vary from between 268 million and 409 million (Grenon & Batisse, 1989) or 330 million (Jenner & Smith, 1993) while, by the year 2025, arrivals could reach between 379 and 758 million (Grenon & Batisse, 1989).

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