Tourism in the Mediterranean: Trends and Perspectives

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Vulnerable Tourism: Seasonality, Concentration and Security

In the last fifty years, the number of non-resident tourists has multiplied exponentially in the Mediterranean, which is currently the main tourist destination on the planet with more than 232 million international tourists per year, accounting for thirty percent of the totality of the world market and twenty-five percent of the tourist income. The Mediterranean is a destination that is growing in popularity and according to predictions, an increase of between 440 and 665 million tourists is expected by 2025. At present, three quarters of Mediterranean tourism is concentrated in four EU member countries: France, Spain, Italy and Greece (see Table 17). With the accession of Slovenia, Malta and Cyprus, the EU will be even further strengthened in this respect. The rest of the Mediterranean region also has a great depenency on tourism as an economic activity and strategy of development, especially Egypt and Tunisia.

In relation to accommodation, France, Spain and Italy are also host to around seventy percent of the overall industry in the Mediterranean. Most of this accommodation corresponds to flats and second homes, followed by hotels and other types of non-hotel accommodation such as campsites and caravan parks. Within the non-community countries there is further inequality, given that Turkey, Tunisia and Egypt receive most of the international tourists, especially from the EU countries, and even compete with them for the business of the new republics of the USSR's dismemberment.

The emerging destinations are those which are set to receive the strongest pressure, especially in the case of EU countries such as Greece and Cyprus, as well as Turkey, Morocco and Tunisia, which are developing new tourist initiatives that will increase the environmental pressure on the entire area. A joint effort by the different agents is necessary, on the part of the public authorities, international institutions, companies, experts, NGOs and civil society in general, in order to guarantee the implementation of sustainable tourism in the Mediterranean.

One of the main problems is tourist seasonality, given that it is calculated that between the months of June and September the Mediterranean basin receives around forty-five million national tourists and more than fifty million foreign tourists, mainly concentrated on the coast and the islands. This fact leads to a high concentration of visitors and an unequal distribution of tourist income over the course of the year. Most of the tourist products and services on offer focus on the sun and beach scenario, although in the fast few years a diversification of these offers has been planned.

This pressure of tourism has had both direct and indirect effects on the area such as the totally uncontrolled modification and urbanisation of bays and beaches with construction of residences, services and public access. The lineal concentration and the nuclearisation of the coast are issues that are related to an intensive urbanisation and indiscriminate land occupation. On many occasions, the construction on the seafront has even led to the privatisation of the shoreline and impeding public access. This process has been called «littoralisation» or Marbellisation, a little desirable trend from the point of view of environmental sustainability.

Instability as a Weakness

The European countries of the Mediterranean basin have become destinations of shelter in the face of the international instability that has resulted from war and conflicts over the last few years (such as those of the Balkans and those more recent in Afghanistan and Iraq), as well as terrorist attacks, and the crisis provoked by the Severe Acute Respiratory Syndrome (SARS), which particularly affected both the source and the receiving markets in the Asian southeast and determined North American cities.

The effects of the 11th September attacks could be felt throughout 2002, especially during the first months of the year, with an notable decrease in the influx of tourists to some of the Mediterranean countries, particularly Egypt, Israel, Morocco, Tunisia and Cyprus. Another severe blow to the sector was the Bali attack in October 2002, which was clearly aimed at the tourist industry. Moreover, the second *Intifada* and the toughening of relations between Israel and Palestine has meant a radical decrease in the influx of tourists to the area, and has had a particular effect on populations where the tourist GDP was the main source of income, such as Bethlehem, and

TABLE 17	Influx of international tourists according to country of destination and income from international tourism. Year 2002						
	Series	Arrival of international tourists (in thousands)	% diff. 2002/2001	Income from international tourism in $ USA (millions)	% diff. 2002/2001	Expenditure international tourism in $ USA (millions)	% diff. 2002/2001
Algeria	TEP	988	8.7	-	-	-	-
Bosnia and Herzegovina	TCE	104	13.4	-	-	-	-
Cyprus	TF	2,418	-10.3	1,863	-10.4	424	17.7
Croatia	TCE	6,944	6.1	3,811	14.3	781	28.8
Egypt	TF	4,906	12.6	3,764	-0.9	1,278	6.9
Slovenia	TCE	1,302	6.8	1,083	5.9	614	12.2
Spain	TF	51,748	3.3	33,609	-2.9	6,638	5.4
France	TF	77,012	2.4	32,329	1.5	19,460	2.6
Greece	TF	14,180	-	9,741	-2.8	2,450	-45.2
Israel	TF	862	-27.9	1,197	-18.0	2,547	-13.7
Italy	TF	39,799	0.6	26,915	-2.7	16,935	7.6
Lebanon	TF	956	14.2	-	-	-	-
Malta	TF	1,134	-3.9	568	-5.6	152	-18.7
Morocco	TF	4,193	-0.7	2,152	-0.1	444	-
Monaco	TCE	262	-2.7	-	-	-	-
Portugal	TF	11,666	-4.1	5,919	2.2	2,274	2.4
Serbia and Montenegro	TCE	488	27.5	-	-	-	-
Tunisia	TF	5,064	-6.0	1,422	-13.7	-	-
Turkey	TF	12,782	18.5	9,010	4.8	1,881	8.2

TF: Influx of international tourists at the borders (not counting day visitors)
TCE: Influx of international tourists to collective establishments.
TEC: Influx of international tourists, excursionists and cruise passengers.
Source: Own production based on the data of the WTO (September 2003) and the statistics services of Algeria, Bosnia and Herzegovina, Greece, Yugoslavia (Serbia-Montenegro) and Monaco.

even the bordering countries, especially Jordan and Egypt.
This situation became worse still with the wave of terrorist attacks against Jewish objectives and the allied nations in the Iraqi War. In April 2004, there was the attack against a group of tourists visiting the synagogue of Ghriba on the island of Djerba, in Tunisia; in May 2003, the Casablanca attacks were carried out, directed against Jewish and Spanish objectives in Morocco;[1] and in November of the same year there were further attacks in Istanbul, Turkey, against the synagogues of Neve Shalom and Shishli and British interests in the city.
In reference to Algeria, European diplomats currently do not recommend visiting the country other than for essential or professional reasons. The threats against foreigners by the terrorist groups operating in the country have not yet been lifted. After the kidnapping of European tourists and the murder of a Saudi prince in 2003 all trips to the south of the country are advised against. In the case of Libya, at the end of 2003 there were advances made in an opening process which may lead to the development of the tourist industry in the country.
In the case of Europe, Albania is a country which has precarious security and health conditions, with areas of restricted tourism in the northwest (Kukes, Tropoja, Skutari) and the south (Girikastra). As a result of the Balkan conflict, the access to the Croatian areas of Eastern Slovenia, Baranja and Srjem and the zones which formed part of the Srpska Republic of Krajina are not recommended due to the risk of mines which have not yet been deactivated. In Serbia-Montenegro visits to Kosovo is not advised.
Independentist terrorist groups have been responsible for acts in European countries, such as ETA in Spain, which planted bombs in hotels in Guetxo, Pamplona, Alicante and Benidorm during June and July 2003 as part of its campaign against the Spanish tourist industry. The FLNC made a series of attacks throughout the island of Corsica in 2003. The dissolution of the Kadex, successor of the PKK, in November 2003, has not put an end to the confrontations between the Turkish army and the Kurd movement in some areas of the country.
Apart from these conflicts, we should note the geographic instability provoked by earthquakes, given that the Mediterranean basin is one of the areas of greatest seismic activity on the planet. In the last few years, there have been several earthquakes that have had media or devastating effects

[1] The recovery of Morocco (seven percent in the eight first months of 2003) is surprising, considering the Casablanca attacks in May. The actions of the Moroccan government against terrorism directed at tourism, plus the actions of international investors has enabled the country to recover its tourism flows, as it did in 2002 following the conflict with Spain over the sovereignty of the small Perejil/Leila Island.

such as the one in San Giuliano (Italy) in November 2002, and those in Bingol (Turkey) and Algiers (Algeria) in May 2003.

The Diversification of Products, New Trends and New Markets

According to the WTO, the four most important sectors of the tourist market in the Mediterranean countries are those of sun and beach holidays, cruises, and nautical and cultural getaways.

The sun and beach package directed at mass tourism is based on tourism of fixed residence. The mature destinations, especially those of the Latin Mediterranean arc, have prompted campaigns for the improvement of hotel infrastructures and the offers of the tourist industries. Apart from meeting halls, a key element to the deseasonalisation and to the tourism related to business and conventions, and the controversial golf courses which have spread through all the various forms, we should point out other infrastructures such as thematic parks (such as the Spanish Mediterranean coast), casinos, as well as sporting ports and cruiser terminals.

The Mediterranean represents twenty percent of the world market in cruise holidays. This is a market that is in expansion, and a dynamic phase of growth, and which has evolved from a product directed primarily to elite groups of customers to a product of mass tourism, with all the risks that this evolution may involve. The cost, the advertising strategies employed by the principal companies, the limited concurrency, and the effects of the 11th September have been, among others, the reasons for this change. The packages offered at affordable prices, mainly under the formula «Fly and Cruise», are the main novelty that explains, in the case of the Mediterranean, the growth of this sector. The rates of annual growth of cruise holidays amounts to thirteen percent in Spain and Italy, twelve percent in Germany, nine percent in France, and eight percent in the United Kingdom. This optimistic growth is due to new products such as the combination of European ports with the Canary Islands and North Africa, and mini-cruises to Malta, Naples and Tunisia, which substitute the cruises suspended by the conflicts that linked Cyprus to Egypt and Israel as well as the emerging destinations of the Adriatic which are still recovering after the Balkans conflict. The modernisations of the quays and facilities devoted to this ocean traffic is also a factor, as well as the promotion of tourist destinations through stopover ports and cruise terminals.

Nautical tourism still preserves a certain exclusivity despite the fact that it has been popularised in recent decades. It is a growing sector among the societies of developed countries which has allowed higher numbers of people to benefit from enjoying nautical tourism activities. This market, consolidated in France, Spain, Italy, Monaco, Gibraltar, Malta, Greece, Cyprus and Turkey has had an equally strong development on the Adriatic coasts (Slovenia, Croatia) as in the north of Africa (Morocco, Tunisia, and Egypt).

Cultural tourism is also experiencing a growth in the Mediterranean region. It includes important sectors such as tourism of heritage sites (archaeological sites, monuments, museums, industrial heritage, and traditional festivals and fairs), the tourism of festivals and cultural events, and is especially related to religious tourism, rural tourism and gastronomic tourism. The countries of the Mediterranean basin are home to 212 of the 754 places listed as world cultural and natural heritage sites by UNESCO, which is twenty-eight percent of the world total. Most of these areas of tourist attraction do not have suitable management plans for tourist usage, and investigations into the capacity and management of visitors have not been implemented. Cultural tourism is particularly concentrated on big cities such as Barcelona, Rome, Naples, Athens, Istanbul, Damascus, Jerusalem and Cairo. Medium-size cities employ an exploitation of tourism that centres on weekend packages or city-breaks, or that forms part of the travelling city-route tourism by bus (especially in the cases of Spain, Italy, Greece and Turkey). This industry exerts an excessive pressure on determined museums and monuments (such as the Alhambra in Granada), with a stay and consumption in the city of only a few hours, in many cases with more detrimental effects than benefits. In the case of cities such as Venice, most of the public are day visitors who spend the night in other cities, a fact which is more evident in towns such as Arles, Nîmes, Pisa, Siena, Avila or Segovia where excursionists prevail. A further strategy adopted by Mediterranean cities to position themselves within the international market are cultural events. In 2004, Athens will host the Summer Olympic Games and has prepared a series of activities which take place within the Cultural Olympiad; Genoa is the 2004 European Capital of Culture together with Lille; and also in 2004 Barcelona inaugurates the first Universal Forum of Cultures under the auspices of UNESCO.

TABLE 18 **Influx of international tourists between 1999-2001**

	Influx of international tourists In thousands		
	1999	**2000**	**2001**
Albania	26	32	34
Vatican City (1)	2,800	3,500	-
Libya	40	-	-
Palestine (2)	317	336	-
Syria	1,386	1,416	1,318

(1) Includes only excursionists.
(2) Includes only tourists in hotels.

Source: Own production based on data of the SESRTCIC (2002), WTO (January 2001), Euromonitor (2001) and UNCTAD (2002).