



The Mediterranean – a tourism stronghold: Facts and Figures

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**Frédéric Pierret
Executive Director
World Tourism Organization**



World 2011

Inbound tourism: World 2011

International tourist arrivals, 1995-2011* (million)

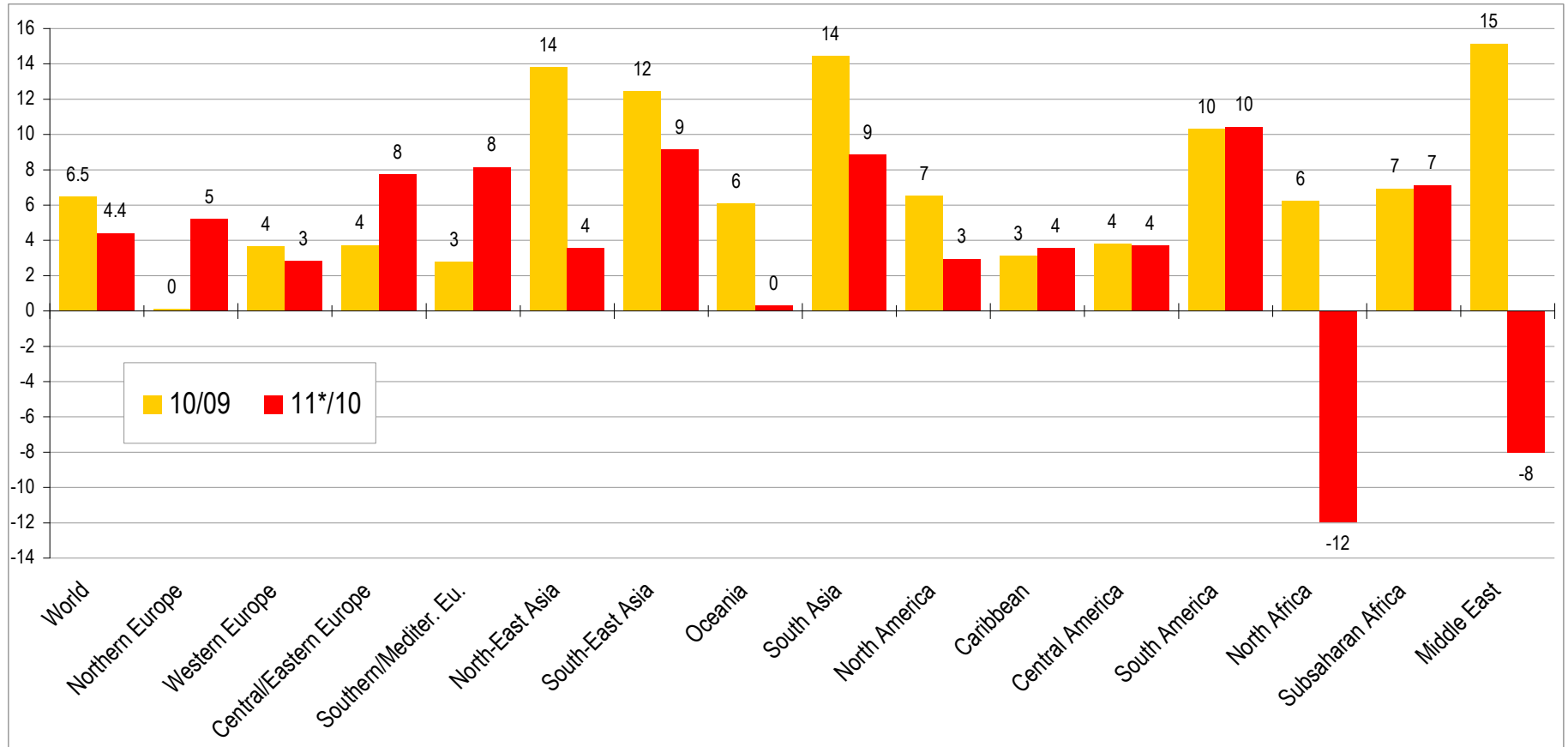


Source: World Tourism Organization (UNWTO)

2010 and 2011 by subregion

International Tourist Arrivals

(% change over same period of the previous year)

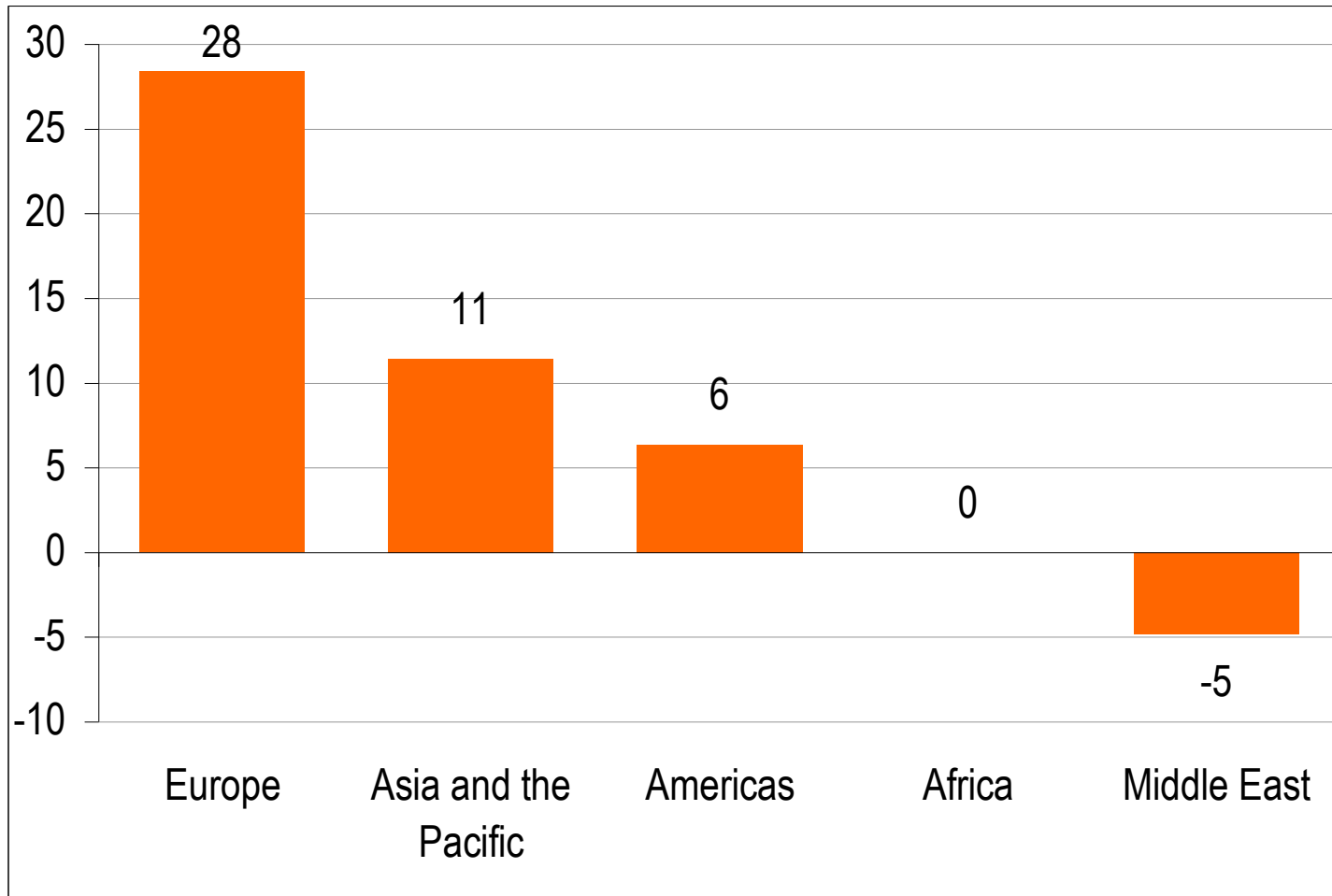


Source: World Tourism Organization (UNWTO) ©

Increase 2011 by region

International Tourist Arrivals

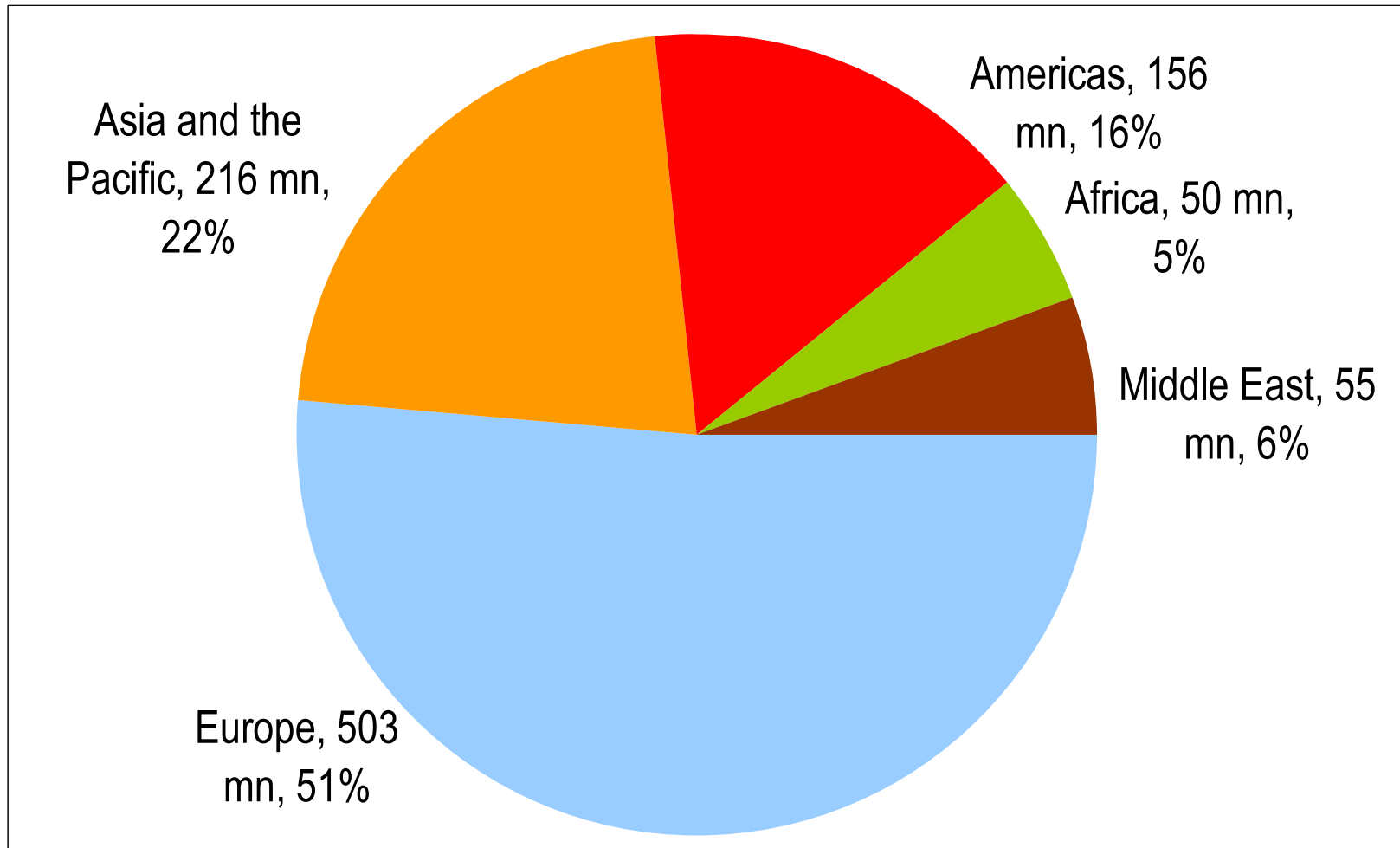
(absolute change 2011, million)



Source: World Tourism Organization (UNWTO) ©

Absolute numbers 2011 by region

World Inbound Tourism: International Tourist Arrivals, 2011* (million)



Source: World Tourism Organization (UNWTO) ©

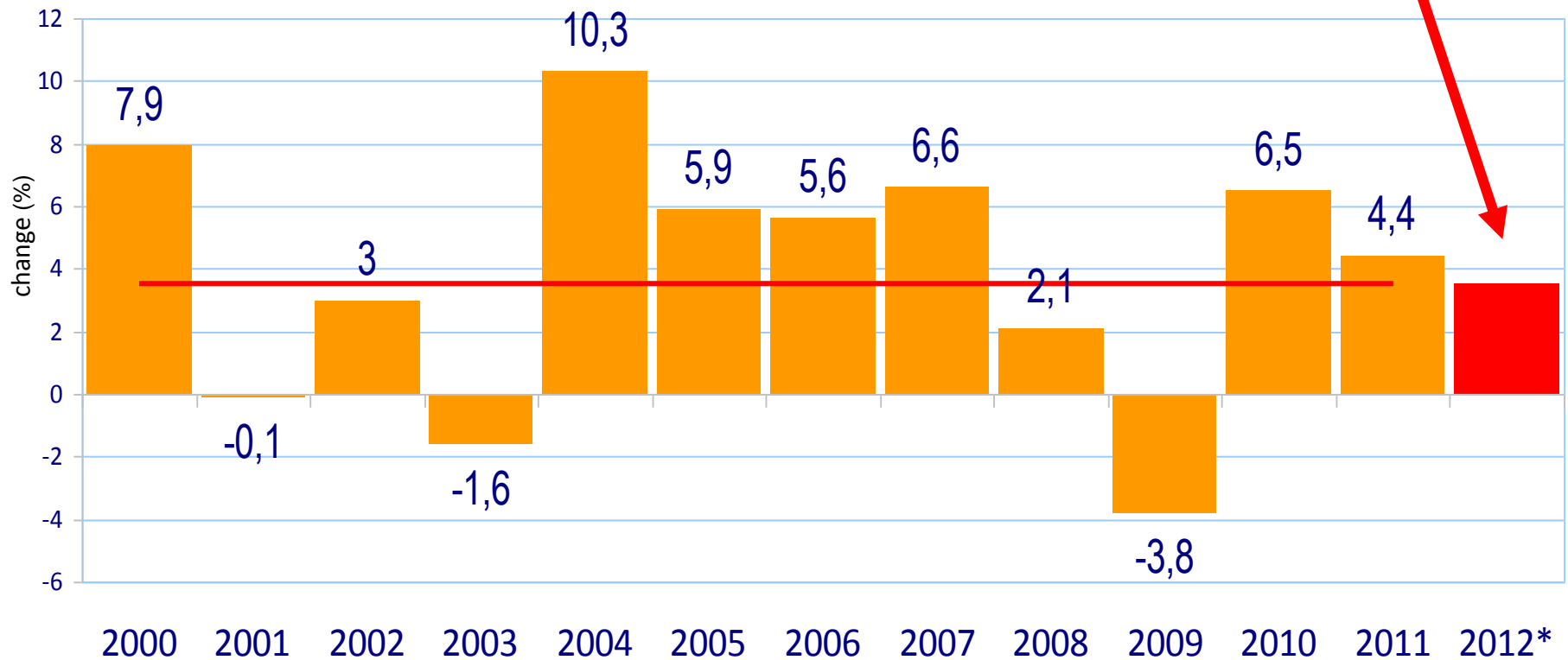


Outlook 2012

Outlook: World

Forecast
2012: 3% to 4%

International tourist arrivals



International tourism: projection full year 2012

	2011	Projection 2012
World	+4.4%	+3% to +4%
Europe	+6.0%	+2% to +4%
Asia and the Pacific	+5.6%	+4% to +6%
Americas	+4.2%	+2% to +4%
Africa	+0.0%	+4% to +6%
Middle East	-8.0%	+0% to +5%



Tourism in the Mediterranean

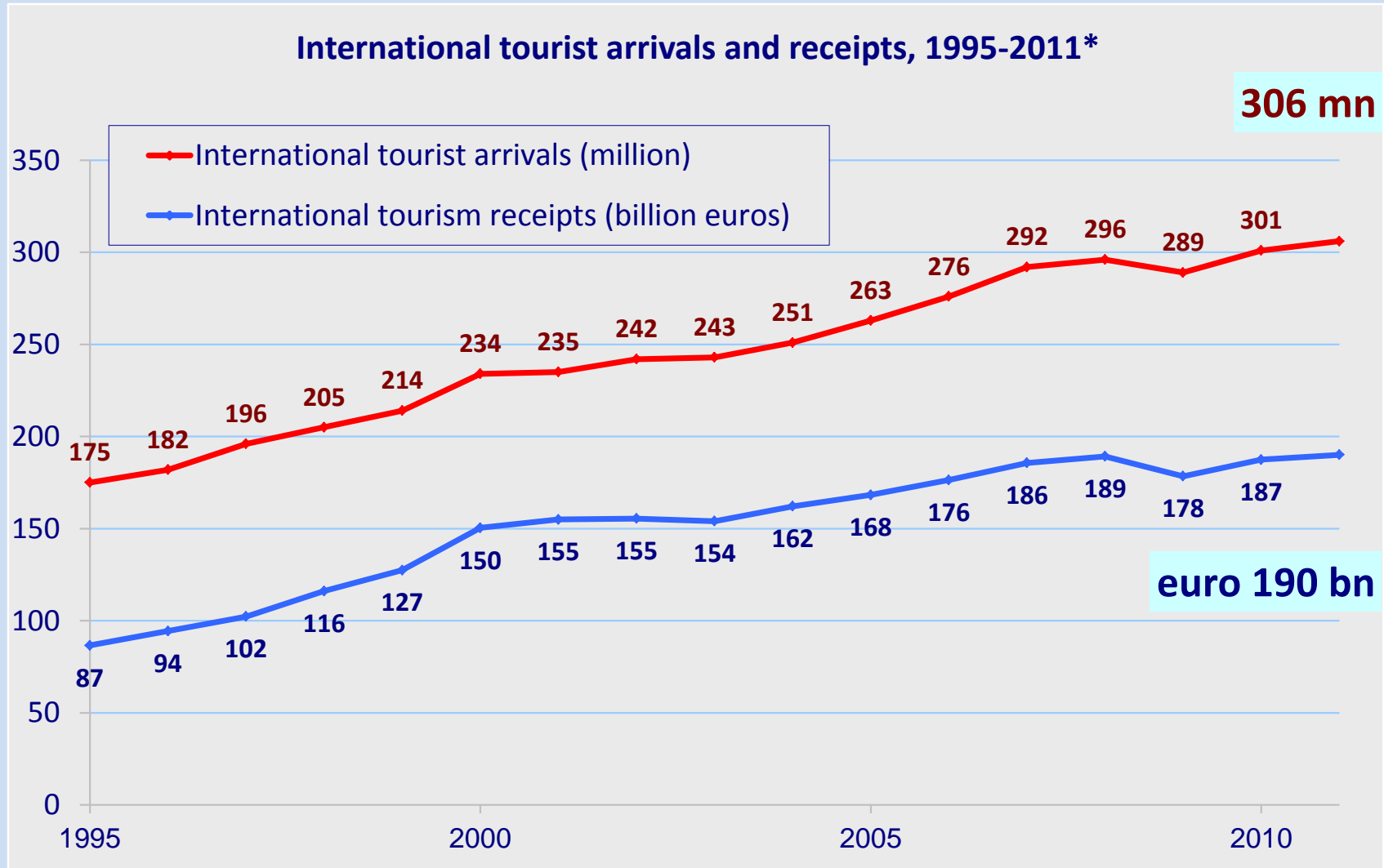
The Mediterranean

- The Mediterranean consists of **29 tourist destinations in Europe, Middle East and Africa**, sharing a similar climate, geography, and in most cases a Mediterranean coastline, as well as historical and cultural links dating back to antiquity.
- Thanks to its unique combination of mild climate, rich history and culture, exceptional natural resources and proximity to major source markets, the group of 29 countries around the Mediterranean Sea is **the world's leading tourism destination in terms of both international and domestic tourism**

Mediterranean tourism at a glance

- **306** million international tourist arrivals (31% of the world arrivals)
- **81%** of arrivals originate from European source markets
- **€215 billion** in export earnings from international tourism (including international passenger transport)
- Receipts from tourism represent **12%** of total exports for Mediterranean countries

International tourism evolution in the Mediterranean



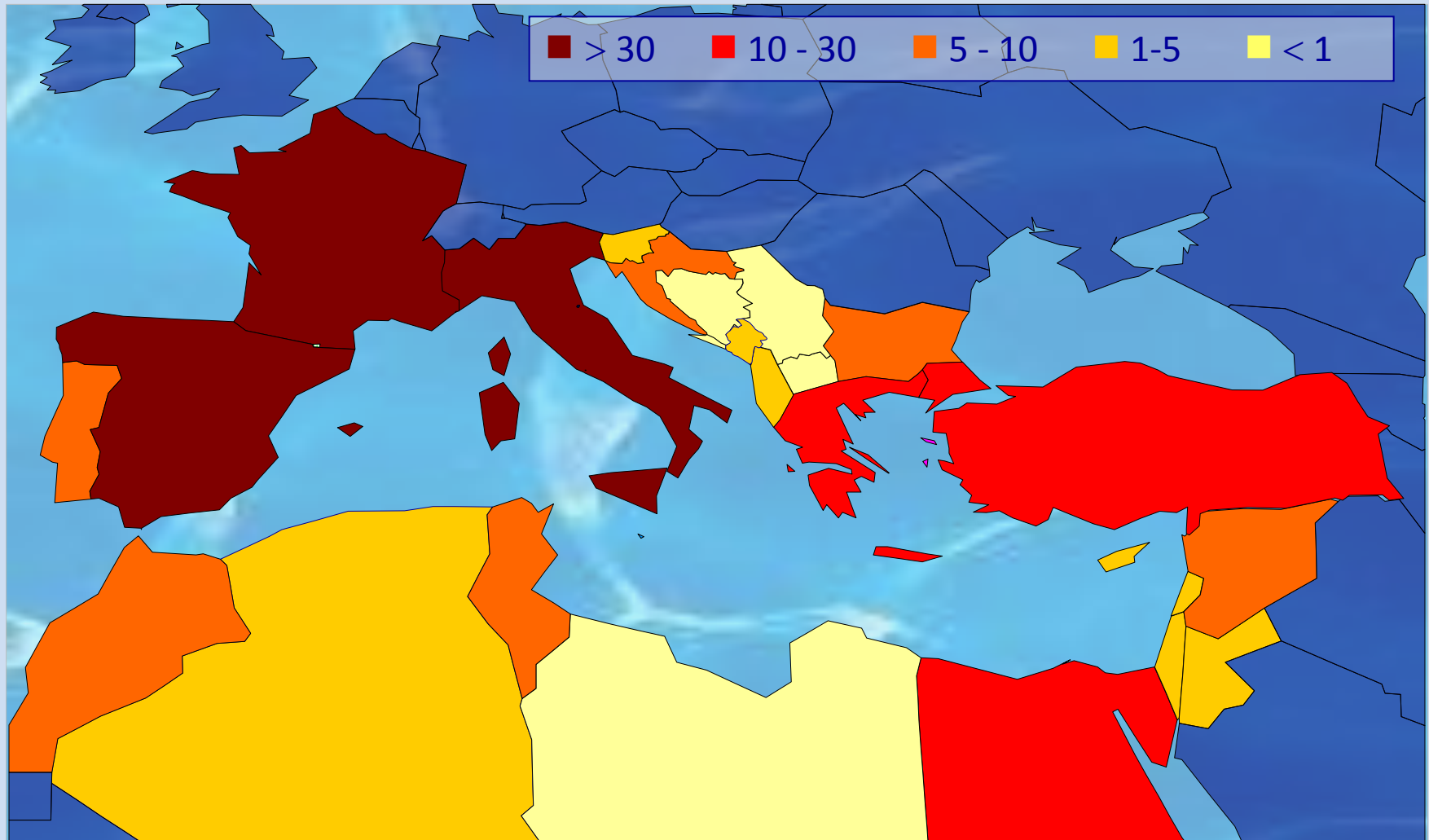
Share of Mediterranean tourism in the world



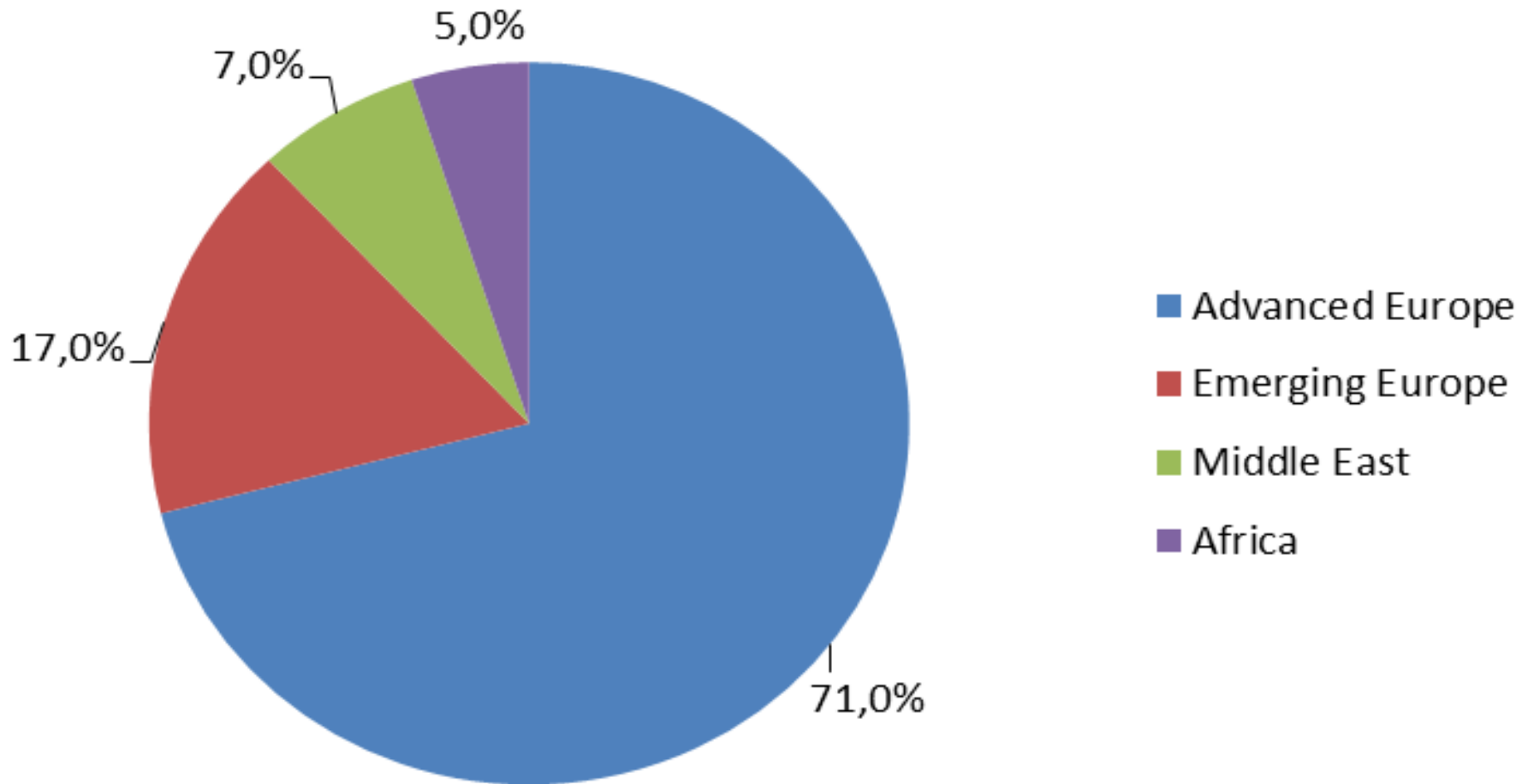
Economic classification of destinations of the Mediterranean (based on the IMF)

- **Advanced economy destinations (all in Europe):**
 - Andorra, Cyprus, France, Greece, Israel, Italy, Malta, Monaco, Portugal, San Marino, Slovenia, Spain
- **Emerging economy destinations:**
 - In Europe: Albania, Bulgaria, Turkey, Bosnia&Herzg, Croatia, F.Yug.Rp.Macedonia, Serbia, Montenegro
 - In Africa: Algeria, Morocco, Tunisia
 - In the Middle East: Egypt, Jordan, Lebanon, Libya, Palestine, Syria

Most tourists travel to the traditional destinations of Southern Europe



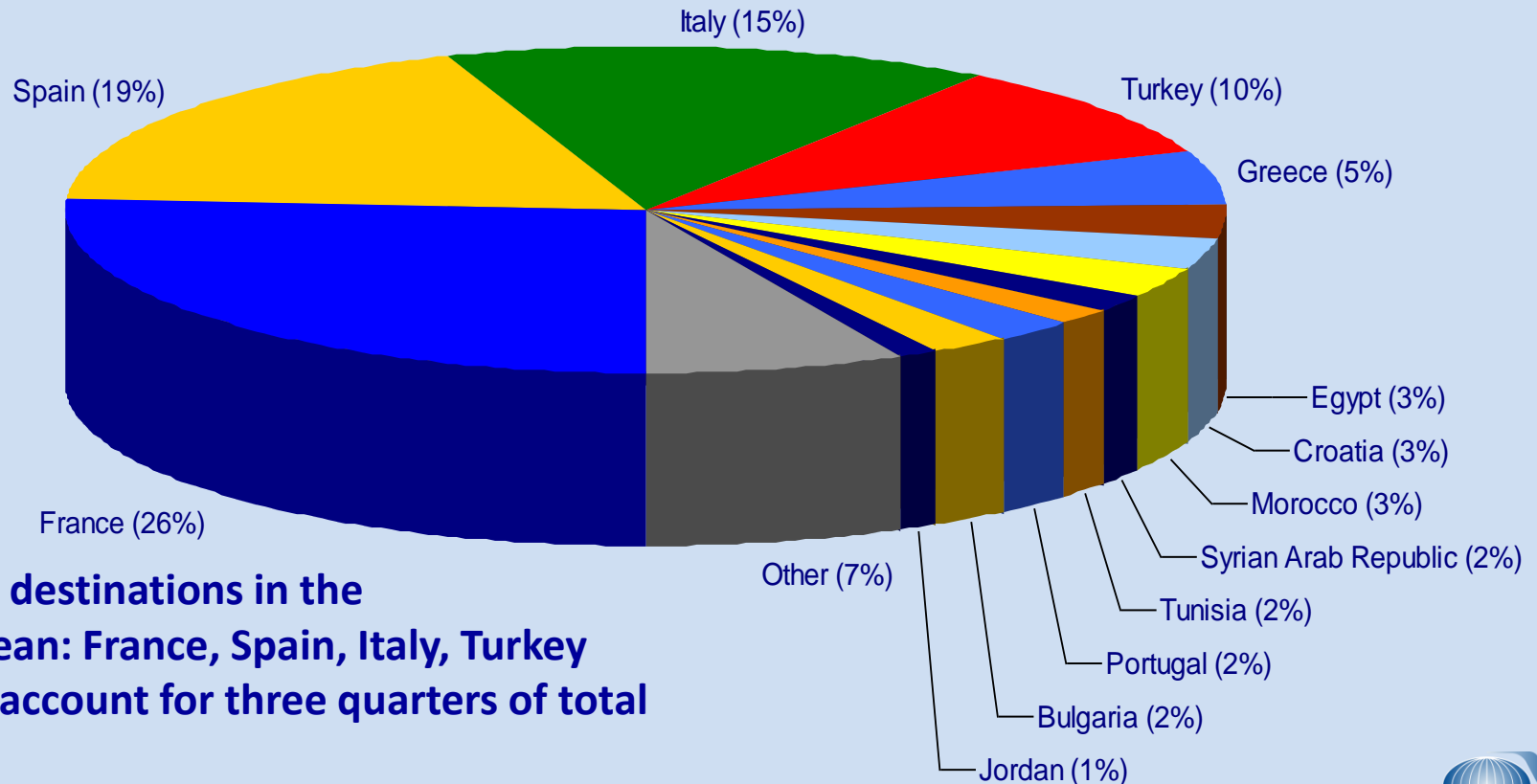
European destinations received 88% of total arrivals in the Mediterranean in 2011



International tourist arrivals by destination

Market share in the region, 2011

Mediterranean



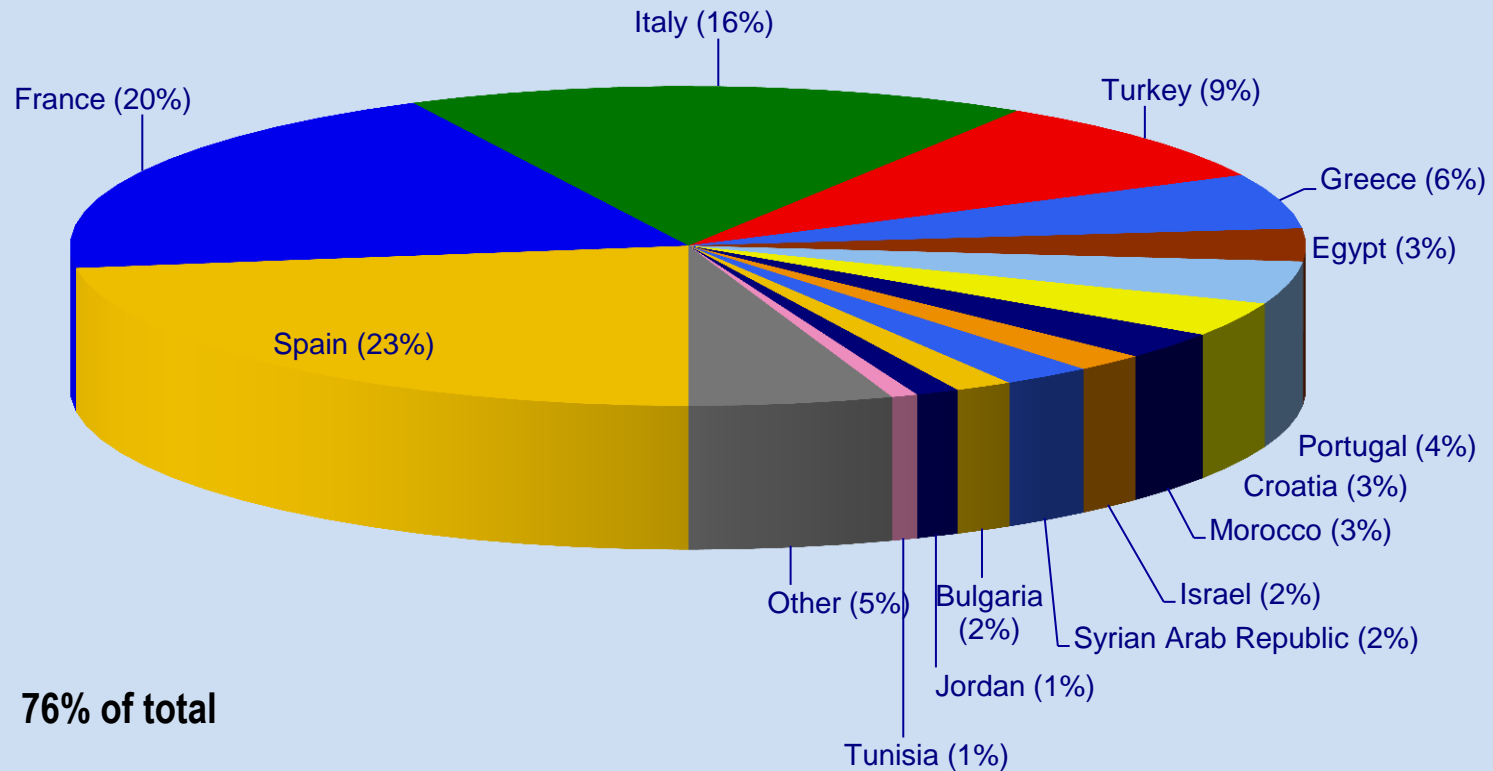
The top five destinations in the Mediterranean: France, Spain, Italy, Turkey and Greece account for three quarters of total arrivals

International tourism receipts by destination

Market share in the region, 2011

International tourism receipts: €190 billion
(US\$ 265 billion)

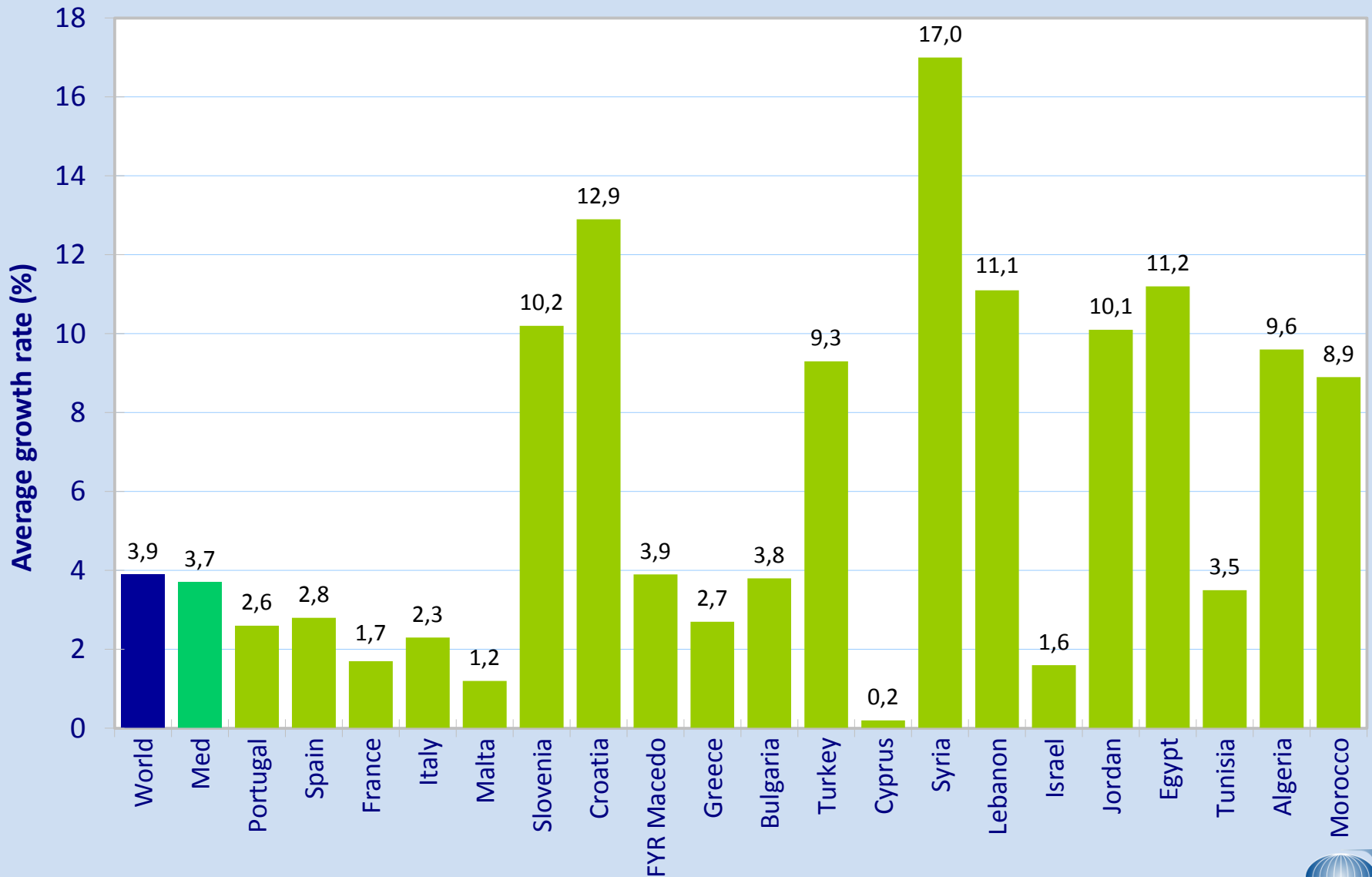
Mediterranean



Top 5: 76% of total

International tourism around the Mediterranean

Average annual growth rate 1995-2010



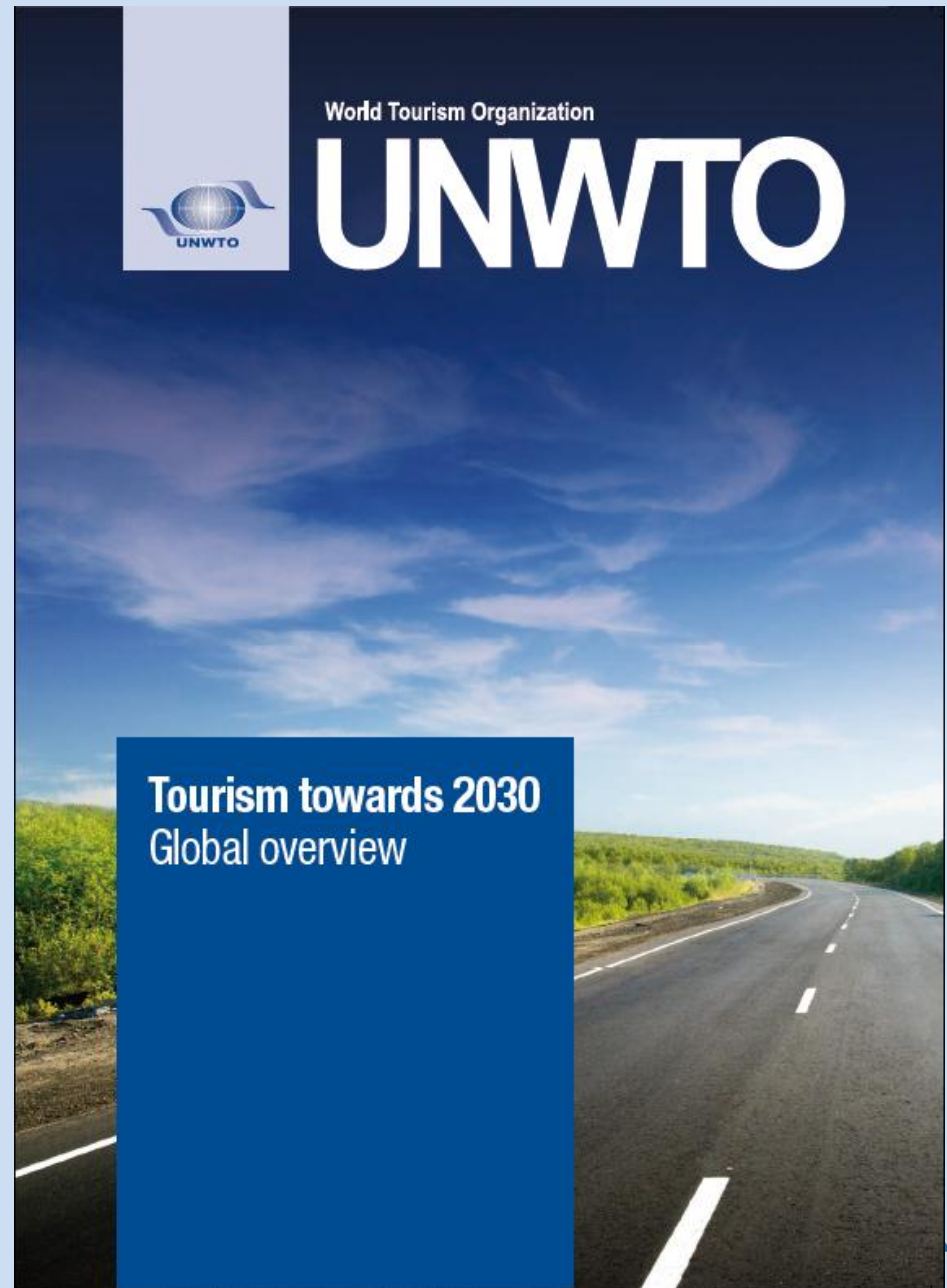
Emerging destinations record faster growth

	Average annual growth 1995-2010
Mediterranean	3.7%
Advanced economy destinations	2.2% (149 mn in 1995 to 206 mn in 2010)
Emerging economy destinations	9% (26 mn in 1995 to 95 mn in 2010)
Emerging Europe	9%
Middle East	12%
North Africa	6%

Over a quarter of world tourism receipts are generated in the Mediterranean

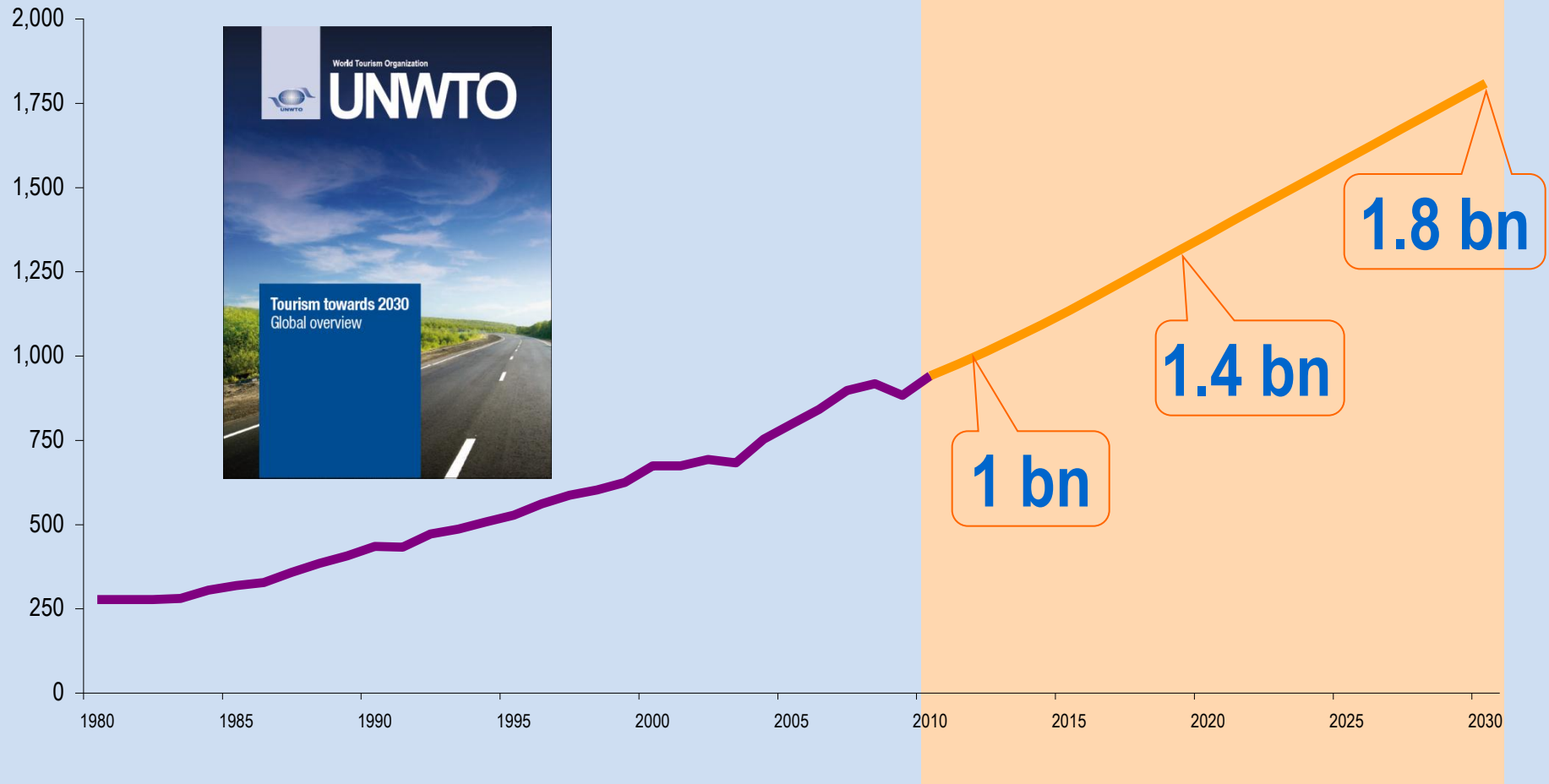
- **190 billion euros** in international tourism receipts (26% of world total) + **25 billion euros** in passenger transport receipts
- **380 euros per inhabitant** on average (vs 105 world)
- **12%** of exports of goods and services (double the world average, 6%) in 2010
 - Tourism receipts in the advanced economy destinations in Europe accounted for 11% of total exports, in the Middle East for 24% , in the emerging European destinations 17% and 10% in the Mediterranean Africa
- **Surplus of 98 billion euros** in 2010 on the Mediterranean countries' Balance of Payment

Long Term Trends



International tourist arrivals to reach 1.4 billion in 2020 and 1.8 billion by 2030

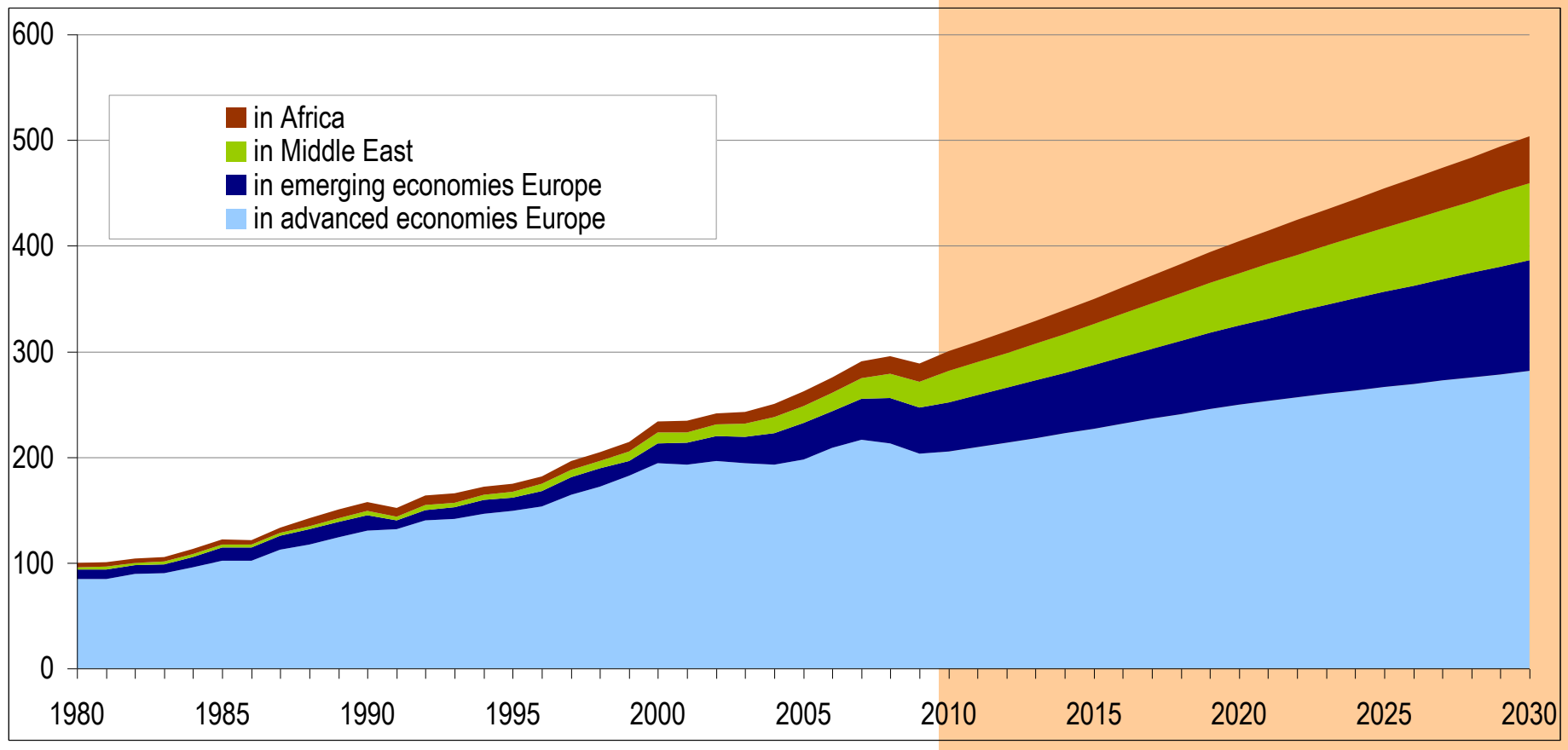
International tourism, World



source: World Tourism Organization (UNWTO) ©

Mediterranean expected to reach 500 million tourists in 2030

Tourism Towards 2030: international tourism in the Mediterranean (international tourist arrivals, million)



Source: World Tourism Organization (UNWTO) ©

The Mediterranean: 10 million new arrivals per year on average up to 2030

- Tourist arrivals will increase from 300 million in 2010 to over **500 million in 2030**. This represents an average **2.6% growth per year** for that period, somewhat below the world average of 3.3% a year.
- In absolute terms this represents an **average increase of some 10 million visitors a year**.
- The market share of Mediterranean destinations in total tourist arrivals worldwide will decline slightly **from 32% in 2010 to 28% in 2030**.
- In the long term, emerging country destinations are expected to grow faster than mature destinations. In 2010-2030, Mediterranean Africa (+4.6% a year), the Middle East (+4.5% a year) and the emerging economies of Europe (+4.1%) will outgrow the advanced economies of Europe (+1.6%)



Challenges and opportunities

The Mediterranean: Challenges and opportunities

Challenges

- Political changes
- The economy
- Increased competition
- Changing consumer and new business models
- Preserving natural heritage

Opportunities

- Product diversification
- Tackling new markets
- Positioning the Mediterranean as a «green» destination
- Building long-term development and strategies
- Increasing regional cooperation



**Thank you very much
for your attention!**

fpierret@unwto.org

Slides prepared by Michel JULIAN

World Tourism Organization (UNWTO)

www.unwto.org

