The Mediterranean – a tourism stronghold: Facts and Figures

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World 2011
Inbound tourism: World 2011

International tourist arrivals, 1995-2011* (million)

528
561
586
603
625
674
673
693
682
753
797
842
898
917
882
939
980 mn

Source: World Tourism Organization (UNWTO)

International Tourism Receipts: euro 738 billion
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*

Europe, 503 mn, 51%
Asia and the Pacific, 216 mn, 22%
Americas, 156 mn, 16%
Africa, 50 mn, 5%
Middle East, 55 mn, 6%

Source: World Tourism Organization (UNWTO) ©
Outlook 2012
International tourist arrivals

Source: World Tourism Organization (UNWTO)
### International tourism: projection full year 2012

<table>
<thead>
<tr>
<th>Region</th>
<th>2011</th>
<th>Projection 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>+4.4%</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Europe</td>
<td>+6.0%</td>
<td>+2% to +4%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>+5.6%</td>
<td>+4% to +6%</td>
</tr>
<tr>
<td>Americas</td>
<td>+4.2%</td>
<td>+2% to +4%</td>
</tr>
<tr>
<td>Africa</td>
<td>+0.0%</td>
<td>+4% to +6%</td>
</tr>
<tr>
<td>Middle East</td>
<td>-8.0%</td>
<td>+0% to +5%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)
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

![International tourist arrivals and receipts, 1995-2011*](chart)

- **International tourist arrivals (million)**
- **International tourism receipts (billion euros)**

Source: World Tourism Organization (UNWTO)
Share of Mediterranean tourism in the world

Source: World Tourism Organization (UNWTO)
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

Source: World Tourism Organization (UNWTO)
European destinations received 88% of total arrivals in the Mediterranean in 2011.

Source: World Tourism Organization (UNWTO)
International tourist arrivals by destination
Market share in the region, 2011

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

Source: World Tourism Organization (UNWTO)
Mediterranean

Top 5: 76% of total

International tourism receipts by destination
Market share in the region, 2011

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

Spain (23%)
France (20%)
Italy (16%)
Turkey (9%)
Greece (6%)
Egypt (3%)
Portugal (4%)
Croatia (3%)
Morocco (3%)
Israel (2%)
Syrian Arab Republic (2%)
Bulgaria (2%)
Tunisia (1%)
Jordan (1%)
Other (5%)

Source: World Tourism Organization (UNWTO)
International tourism around the Mediterranean

Average annual growth rate 1995-2010

Source: World Tourism Organization (UNWTO)
## Emerging destinations record faster growth

<table>
<thead>
<tr>
<th>Region</th>
<th>Average annual growth 1995-2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean</td>
<td>3.7%</td>
</tr>
<tr>
<td>Advanced economy destinations</td>
<td>2.2% (149 mn in 1995 to 206 mn in 2010)</td>
</tr>
<tr>
<td>Emerging economy destinations</td>
<td>9% (26 mn in 1995 to 95 mn in 2010)</td>
</tr>
<tr>
<td>Emerging Europe</td>
<td>9%</td>
</tr>
<tr>
<td>Middle East</td>
<td>12%</td>
</tr>
<tr>
<td>North Africa</td>
<td>6%</td>
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</tbody>
</table>
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

source: World Tourism Organization (UNWTO) ©
Mediterranean expected to reach 500 million tourists in 2030

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!

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