Tourism in the Mediterranean: Growth, competitiveness and sustainability.

Euromed: Current Cooperation and Future Perspectives in Sustainable Tourism.

21 June 2012
Brussels, Belgium
International Tourism in the Mediterranean (2011)

- World’s leading tourism destination in terms of international and domestic tourism.
- One third of total arrivals worldwide
- Tourism is a major pillar of Mediterranean economies

306 million international tourist arrivals
215 billion euros in export earnings from international tourism
12% of total exports
10 million new arrivals per year on average up to 2030
# Emerging destinations record faster growth

<table>
<thead>
<tr>
<th>Destination</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>
</tr>
</tbody>
</table>

UNWTO - a Specialized Agency of the United Nations
Mediterranean: Actual trend vs. Tourism 2030 Vision

Source: World Tourism Organization
### Mediterranean: Challenges and opportunities

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Political changes</td>
<td>• Product diversification</td>
</tr>
<tr>
<td>• The economy</td>
<td>• Tackling new markets</td>
</tr>
<tr>
<td>• Increased competition</td>
<td>• Positioning the Mediterranean as a «green» destination</td>
</tr>
<tr>
<td>• Changing consumer and new business models</td>
<td>• Building long-term development and strategies</td>
</tr>
<tr>
<td>• Preserving natural heritage</td>
<td>• Increasing regional cooperation</td>
</tr>
</tbody>
</table>
## TTC Index 2011 and Sustainability Rank

<table>
<thead>
<tr>
<th>Country/Economy</th>
<th>Travel &amp; Tourism Competitiveness Index 2011</th>
<th>Environmental Sustainability Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rank (out of 139)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>3</td>
<td>9</td>
</tr>
<tr>
<td>Spain</td>
<td>8</td>
<td>33</td>
</tr>
<tr>
<td>Cyprus</td>
<td>24</td>
<td>51</td>
</tr>
<tr>
<td>Greece</td>
<td>29</td>
<td>68</td>
</tr>
<tr>
<td>Italy</td>
<td>27</td>
<td>60</td>
</tr>
<tr>
<td>Malta</td>
<td>26</td>
<td>53</td>
</tr>
<tr>
<td>Croatia</td>
<td>34</td>
<td>46</td>
</tr>
<tr>
<td>Slovenia</td>
<td>33</td>
<td>✓ 23</td>
</tr>
<tr>
<td>Israel</td>
<td>46</td>
<td>74</td>
</tr>
<tr>
<td>Tunisia</td>
<td>47</td>
<td>✓ 18</td>
</tr>
<tr>
<td>Montenegro</td>
<td>36</td>
<td>45</td>
</tr>
<tr>
<td>Turkey</td>
<td>50</td>
<td>85</td>
</tr>
<tr>
<td>Egypt</td>
<td>75</td>
<td>113</td>
</tr>
<tr>
<td>Morocco</td>
<td>78</td>
<td>✓ 36</td>
</tr>
<tr>
<td>Syria</td>
<td>105</td>
<td>126</td>
</tr>
<tr>
<td>Albania</td>
<td>71</td>
<td>72</td>
</tr>
<tr>
<td>Bos. &amp; Herz.</td>
<td>97</td>
<td>108</td>
</tr>
<tr>
<td>Libya</td>
<td>124</td>
<td>134</td>
</tr>
<tr>
<td>Algeria</td>
<td>113</td>
<td>120</td>
</tr>
</tbody>
</table>

Source: The Travel & Tourism Competitiveness Report 2011 / WEF/ WB / IUCN
Regional Knowledge Gaps

Source: World Tourism Organization

Tourism Vulnerability ‘Hotspots’

- Caribbean
- Mediterranean
- Middle East
- South/East Asia
- Pacific Ocean Small Island Nations
- Indian Ocean Small Island Nations
- South America
- Africa
- Northern Europe
- Australia/New Zealand

Source: World Tourism Organization

- WS = warmer summers
- WW = warmer winters
- EE = increase in extreme events
- SLR = sea level rise
- LB = land biodiversity loss
- MB = marine biodiversity loss
- W = water scarcity
- D = increase in disease outbreaks
- TCI = travel cost increase from mitigation policy
- PD = political destabilization

Regional Knowledge Gaps
Vulnerabilities In the Mediterranean

- Temperatures will continue to increase
- Droughts will become more frequent
- Water stress will grow
- Fire risks will increase
- Heatwaves will become more frequent
- Biodiversity will be affected
- More vector-borne diseases
- Jellyfish outbreaks or algae blooms will become more frequent
Key challenges in Europe

Identified by the EC’s Tourism Sustainability Group (February 2007)

- Reducing the seasonality of demand
- Addressing the impact of tourism transport
- Improving the quality of tourism jobs
- Maintaining and enhancing community prosperity in the face of change
- Minimizing resource use and production of waste
- Conserving and giving value to natural and cultural heritage
- Making holidays available to all
- Using tourism as a tool in global sustainable development
The **Tourism Chapter** of the Green Economy Report, prepared jointly by UNEP and UNWTO, makes the case for investments in greener and sustainable tourism as a means to create jobs and reduce poverty while also improving environmental outcomes.

Scenarios of Green Investment in tourism lead to significant resource conservation through efficiency improvement and reduction of losses, assuming a growing flow of tourists though with a shift toward less frequent but longer trips.
Green tourism has the potential to create new jobs
Investing in greening of tourism can reduce costs
Tourists are demanding the greening of tourism
The private sector can, and must be mobilized to support green tourism
The development of tourism is accompanied by significant challenges:

- energy and GHG emissions
- water consumption
- waste management
- loss of biological diversity
- effective management of cultural heritage
**The Energy scenario**

- **Total energy consumption** for tourism activities in **2050**: 44% savings in relation to BAU scenario thanks to a modal shift to less carbon intensive transport (e.g. electrified train and coach), behavioral changes (e.g. shorter-haul trips), better energy management (e.g. setting targets and benchmarking for hotels) and technological advances in fuel efficiency.

- **CO2 emissions** will descend -52% by **2050** in relation to BAU. Back to 1,44 GT (2005 level) in 2050, or 7% of global emissions: projected GDP growth higher than average projected growth of global GDP.

- **Energy costs** in “Best practice” hotels are reduced from 6% to 2.5% of annual turnover.

- Additional **employment** in energy, water and waste services; expansion of local hiring and sourcing.
From Rio 92 to Rio+20

- World Summit on Sustainable Development in Johannesburg
- International Year of Ecotourism and Quebec Declaration on Ecotourism
- Global Code of Ethics for Tourism
- Green Economy and Tourism
- Davos Process on Climate Change and Tourism
- Sustainable Tourism - Eliminating Poverty (ST – EP)
- UN Steering Committee on Tourism for Development (SCTD)
- MDG Summit: Millenium Development Goals
- Global Sustainable Tourism Council
- Earth Summit in Rio, Agenda 21 and the UN Commission on Sustainable Development
- UNCSD (Rio+20)
- UNWTO - a Specialized Agency of the United Nations
Sustainable Tourism (par. 130-131)

• We emphasize that well designed and managed tourism can make a significant contribution to the three dimensions of sustainable development, has close linkages to other sectors, and can create decent jobs and generate trade opportunities.

• We recognize the need to support sustainable tourism activities…..

• We call for enhanced support for sustainable tourism activities and relevant capacity building in developing countries…..

• We encourage the promotion of investment in sustainable tourism…

• We underline the importance of establishing appropriate guidelines and regulations in accordance with national priorities and legislation for promoting and supporting sustainable tourism.
Thank you!

Luigi Cabrini
Director, Sustainable Development of Tourism - UNWTO

Visit us at unwto.org