

Challenges of Sustainable Tourism Development in the Mediterranean

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The two most significant global events of the last decade, the 2008 financial crisis and the 2010 Arab Spring, left their greatest mark in the Mediterranean region. When we add the global drop in oil prices in 2014 and the European migrant crisis of 2015, and take into account that the Middle East remains the world's key crisis flashpoint, we can conclude that the Mediterranean is the region most exposed to turbulent events in the last ten years. Many Mediterranean countries, especially those that are EU Members States, have yet to completely recover from the crisis, and the countries that have experienced the least economic growth are also located in the Mediterranean. The most significant economic declines since 2008 have taken place in Greece and war-ravaged Syria and Libya, while other Mediterranean countries, such as Spain, Italy, Croatia or Cyprus, figure prominently among other countries facing various economic issues.

The Arab Spring left no Arab Mediterranean country untouched, and its consequences are still strongly felt in Tunisia and Egypt, as well as in Syria and Libya, which have descended into still unresolved civil wars. Both Tunisia, despite its democratic political system, and Egypt, which is ruled by the army, have been buffeted by terrorist activities, and in both countries conservative Islamic forces show signs of growing stronger. Neighbouring wars and terrorist activities have also had a negative impact on the economic situation in Turkey, while Lebanon, Israel, Jordan and the Palestinian territories have been in a state of constant instability for decades in spite of their nominal economic growth. Even the relatively peaceful region

of south-eastern Europe has, since 2016, shown evidence of increasing ethnic tension, primarily in Kosovo, Bosnia and Herzegovina, and Macedonia.

These turbulent events have had a strong impact on tourism, one of the most important industries throughout the Mediterranean, especially in those countries in which it is the main economic activity, such as Malta, Cyprus, Croatia, Montenegro and Greece. This has consequences for tourism sustainability from an ecological standpoint, as well as in terms of sociocultural and economic aspects. Therefore, it would be interesting to determine how these changes may affect the sustainability of tourism development in the near future, although the events of the last years make it exceptionally difficult to make accurate predictions. Given that many important processes for tourism sustainability changed course in the escalating turbulence after 2008, the following analysis also took into account the period between 2000 and 2009. For the purposes of simplification, three crucial years were taken into consideration: 2000, the start of the new millennium; 2009, the year marking the beginning of the new turbulent period; and 2016, the most recent year, with the caveat that the tourism data used were from 2015 due to the lack of newer data.

Key Features of Demographic and Economic Trends in the Mediterranean in the New Millennium

The data in Tables 7 and 8, which show the population and per capita GDP figures for Mediterranean countries in 2000, 2009 and 2016, reveal major differences between the countries in terms of both population and economic growth. Three basic groups of countries can be established:

TABLE 7

Populations of Mediterranean Countries in 2000, 2009 and 2016

Country	Area in sq km	Population in 000			Population per sq km 2016	Change %		
		2000	2009	2016		2000-2009	2009-2016	2000-2016
Albania	28,748	3,490	3,640	3,039	105.7	4.3	-16.5	-12.9
Algeria	2,381,741	31,194	34,178	40,264	16.9	9.6	17.8	29.1
Bosnia and Herzegovina	51,197	3,836	4,613	3,862	75.4	20.3	-16.3	0.7
Croatia	56,594	4,282	4,489	4,314	76.2	4.8	-3.9	0.7
Cyprus	9,251	758	797	1,206	130.4	5.1	51.3	59.1
Egypt	1,001,449	68,360	83,083	94,667	94.5	21.5	13.9	38.5
France	551,695	59,330	62,151	62,814	113.9	4.8	1.1	5.9
Greece	131,957	10,602	10,737	10,773	81.6	1.3	0.3	1.6
Israel ¹	20,770	5,664	7,047	8,175	393.6	24.4	16.0	44.3
Italy	301,338	57,634	58,126	62,008	205.8	0.9	6.7	7.6
Jordan	89,342	4,999	6,343	8,185	91.6	26.9	29.0	63.7
Lebanon	10,452	3,578	4,017	6,238	596.8	12.3	55.3	74.3
Libya ²	1,759,540	5,115	6,310	6,542	3.7	23.4	3.7	27.9
Macedonia	25,713	2,041	2,067	2,100	81.7	1.3	1.6	2.9
Malta	316	392	405	415	1,313.3	3.3	2.5	5.9
Montenegro ³	13,812	680	672	645	46.7	-1.2	-4.0	-5.1
Morocco	446,550	30,122	34,859	33,656	75.4	15.7	-3.5	11.7
Palestinian territories ⁴	6,242	3,330	4,200	4,837	774.9	26.1	15.2	45.3
Portugal	92,212	10,048	10,708	10,834	117.5	6.6	1.2	7.8
Serbia ⁵	77,474	7,498	7,379	7,144	92.2	-1.6	-3.2	-4.7
Slovenia	20,273	1,928	2,006	1,978	97.6	4.0	-1.4	2.6
Spain	505,370	39,997	40,525	48,564	96.1	1.3	19.8	21.4
Syria	185,180	16,306	20,178	17,185	92.8	23.7	-14.8	5.4
Tunisia	163,610	9,593	10,486	11,135	68.1	9.3	6.2	16.1
Turkey	783,562	65,667	76,806	80,275	102.4	17.0	4.5	22.2
TOTAL	8,714,388	446,444	497,831	530,855	60.9	11.5	6.6	18.9

¹ Including the population of East Jerusalem and the Golan Heights. ² Population data are for the year 2015 instead of 2016. ³ For the year 2000, population data were taken from the 2003 census. ⁴ Including Israeli settlers in the West Bank. ⁵ For the year 2000, population data were taken from the 2002 census.

Sources: CIA, *The World Factbook* 2001, 2010 and 2017, www.cia.gov/library/publications; City Population, *Population Statistics for Countries, Administrative Areas, Cities and Agglomerations*, www.city-population.de/.

- a) Western European Mediterranean EU Member States, primarily Spain, France and Italy: These countries have, for the most part, experienced modest, but constant economic growth based on very low or negative population growth, which, in turn, is the consequence of higher economic development and immigration, mostly from other EU Member States and non-EU Mediterranean countries. The somewhat higher population growth in some countries, especially Spain, is largely due to the conversion of holiday homes into permanent residences for older people from developed European countries, primarily Germany and the United Kingdom.
- b) Eastern European Mediterranean countries: These countries have mostly seen their populations drop as a result of rising living standards and the corresponding decline in the number of children per family. Another reason is emigration due to the lack of quality employment, mostly to developed countries in the EU. This is especially true for poorly developed countries that are not EU Member States and have not started the accession process: Bosnia and Herzegovina, Albania, and Kosovo. However, other countries have also seen a decrease in the number of inhabitants or minimal population growth, including the three most developed EU Member States in the region, Greece, Slovenia and Croatia.
- c) Asian and African Mediterranean countries: These mostly moderately developed countries have for the most part experienced strong population growth based on high birth rates, with the highest overall growth being registered in Lebanon and Jordan, countries that have received an influx of refugees from neighbouring regions scoured by war. Somewhat lower growth is seen in those countries that have witnessed robust economic growth in the new mil-

TABLE 8

GDP per Capita in Mediterranean Countries in 2000, 2009 and 2016

Country	GDP per capita in \$			Change %		
	2000	2009	2016	2000-2009	2009-2016	2000-2016
Albania	3,000	7,800	11,900	160.0	52.6	296.7
Algeria	5,500	7,200	15,000	30.9	108.3	172.7
Bosnia and Herzegovina	1,700	6,600	11,000	288.2	66.7	547.1
Croatia	5,800	17,700	22,400	205.2	26.6	286.2
Cyprus	14,000	21,300	34,400	52.1	61.5	145.7
Egypt	3,600	6,000	12,100	66.7	101.7	236.1
France	24,400	33,000	42,400	35.2	28.5	73.8
Greece	17,200	31,500	26,800	83.1	-14.9	55.8
Israel	18,900	29,000	34,800	53.4	20.0	84.1
Italy	22,100	30,300	36,300	37.1	19.8	64.3
Jordan	3,500	5,200	11,100	48.6	113.5	217.1
Lebanon	5,000	13,300	18,500	166.0	39.1	270.0
Libya	8,900	13,600	14,200	52.8	4.4	59.6
Macedonia	4,400	9,300	14,500	111.4	55.9	229.5
Malta	14,300	24,700	37,900	72.7	53.4	165.0
Montenegro ¹	2,300	10,000	17,000	334.8	70.0	639.1
Morocco	3,500	4,700	8,400	34.3	78.7	140.0
Palestinian territories ²	1,300	2,900	4,300	123.1	48.3	230.8
Portugal	15,800	22,800	28,500	44.3	25.0	80.4
Serbia ¹	2,300	10,700	14,200	365.2	32.7	517.4
Slovenia	12,000	28,000	32,000	133.3	14.3	166.7
Spain	18,000	29,800	36,500	65.6	22.5	102.8
Syria ³	3,100	4,700	2,900	51.6	-38.3	-6.5
Tunisia	6,500	9,300	11,700	43.1	25.8	80.0
Turkey	6,800	11,600	21,100	70.6	81.9	210.3

¹ For the year 2000, data for GDP per capita refer to the whole state of Serbia and Montenegro. ² GDP per capita data are for the year 2014 instead of 2015. ³ GDP per capita data are for the year 2015 instead of 2016.

Source: CIA, *The World Factbook* 2001, 2010 and 2017, www.cia.gov/library/publications/.

lennium, but also intensive emigration to Europe: Turkey, Morocco and Tunisia. Libya and Syria are a case apart, having registered negative population growth despite very high birth rates due to the exodus of their populations as a result of war.

The economic processes do not correlate with the demographic processes. This is because practically all developed European Mediterranean countries, including Israel, were badly hit by the 2008 economic crisis, and most have not fully recovered. At the same time, all moderately developed countries, except for Syria and Libya due to their wars, have experienced notable economic growth, especially Asian and African Mediterranean countries. However, significant economic growth can also be found in moderately developed eastern European Mediterranean countries, which have seen negative population growth and emigration, although this growth was much slower in the 2009-2016 period than in

the preceding period after 2000. Rapid economic growth in many south-eastern European countries after 2000 was partly due to the improvement in the security situation following the end of the wars in Croatia and Bosnia and Herzegovina in 1995 and the NATO intervention in Serbia in 1999.

Although data on per capita GDP growth needs to be taken with a grain of salt due to differences in currency exchange rates, it is interesting that the greatest growth in the 2000-2009 and 2009-2016 periods occurred in Turkey and all the Arab Mediterranean countries except for Syria and Libya. Algeria, Jordan, Egypt and Turkey registered the highest growth, while growth in Tunisia was much lower, largely because of the Tunisian economy's much greater dependence on tourism. According to recent data, only Algeria, Turkey and Malta registered real GDP growth rates consistently higher than 3% in the last three years, with the latter being a special case due to the recent growth of its financial and IT sectors.

TABLE 9 Number of Tourists in Mediterranean Countries in 2000, 2009 and 2015

Country	Tourists in thousands			Change %			Concentration of tourism near the Mediterranean coast
	2000	2009	2015	2000-2009	2009-2015	2000-2015	
Albania	317	1,792	3,784	465.3	111.2	1,093.7	very high (over 90%)
Algeria	866	1,912	1,710	120.8	-10.6	97.5	undeveloped tourism industry
Bosnia and Herzegovina	171	311	678	81.9	118.0	296.5	low (5-25%)
Croatia	5,831	8,694	12,683	49.1	45.9	117.5	very high (over 90%)
Cyprus	2,686	2,141	2,659	-20.3	24.2	-1.0	very high (over 90%)
Egypt	5,116	11,914	9,139	132.9	-23.3	78.6	low (5-25%)
France	77,190	76,764	84,452	-0.6	10.0	9.4	low (5-25%)
Greece	13,096	14,915	23,599	13.9	58.2	80.2	very high (over 90%)
Israel	2,417	2,321	2,799	-4.0	20.6	15.8	high (60-80%)
Italy	41,181	43,239	50,732	5.0	17.3	23.2	high (60-80%)
Jordan	1,427	3,789	3,761	165.5	-0.7	163.6	not on the Mediterranean
Lebanon	742	1,844	1,518	148.5	-17.7	104.6	very high (over 90%)
Libya ¹	174	34	...	-80.5	...	...	undeveloped tourism industry
Macedonia	224	259	486	15.6	87.6	117.0	not on the Mediterranean
Malta	1,216	1,182	1,791	-2.8	51.5	47.3	very high (over 90%)
Montenegro ²	...	1,044	1,560	...	49.4	...	very high (over 90%)
Morocco	4,240	8,341	10,177	96.7	22.0	140.0	low (5-25%)
Palestinian territories	330	396	432	20.0	9.1	30.9	undeveloped tourism industry
Portugal	12,097	6,439	9,957	-46.8	54.6	-17.7	not on the Mediterranean
Serbia ²	239	645	1,132	...	75.5	373.6	not on the Mediterranean
Slovenia	1,090	1,824	2,707	67.3	48.4	148.3	low (5-25%)
Spain	47,898	52,178	68,215	8.9	30.7	42.4	high (60-80%)
Syria	1,416	6,092	...	330.2	...	...	undeveloped tourism industry
Tunisia	5,058	6,901	5,359	36.4	-22.3	6.0	very high (over 90%)
Turkey	9,586	25,506	39,478	166.1	54.8	311.8	high (60-80%)
TOTAL	234,608	280,477	338,808	19.6	20.8	44.4	high (60-80%)

¹ Data for the number of tourists are for the year 2008 instead of 2009. ² For the year 2000, data for the number of tourists refer to the whole state of Serbia and Montenegro.

Sources: UNWTO, *Compendium of Tourism Statistics* (Data 1999-2003, 2006-2010 and 2011-2015), 2005, 2012 and 2017 editions, UNWTO, Madrid; and internal data from the Institute for Tourism Zagreb.

Tourism Development Processes in the Mediterranean and Consequences for Sustainability

Like the demographic and economic processes, the data on tourism development point to three similar groups of countries. However, the trends are significantly different and there are numerous discrepancies, mostly due to political and security aspects. Based on the data on the number of foreign tourists and tourism revenue shown in Tables 9 and 10, the countries can again be divided into three groups in keeping with three characteristic trends in tourism development:

- Growth in tourism in the western part of the European Mediterranean, which includes the three countries with the strongest tourism sectors (Spain, France and Italy), has been moderate in the last six years, although still significantly

higher than the economic growth in these countries. The comparatively small number of registered foreign tourists in 2009 compared to 2000 signifies that tourism in all three countries, as well as in neighbouring Portugal, was hit hard by the 2008 economic crisis. Information on tourism revenue shows comparatively higher growth between the years of 2000 and 2009, followed by a decline in the 2009-2015 period. This is partly due to disturbances in currency exchange rates with the euro, but it can also be attributed to the drop in tourism service prices as a result of the crisis. Somewhat similar trends can be seen in Cyprus, Israel and, to some extent, Malta, which is the only Mediterranean country in the EU to have fully recovered from the crisis. Another interesting fact is that Spain, the western Mediterranean country most affected by the financial crisis, exhibits significantly higher absolute and relative tourism growth

TABLE 10

Tourism Receipts in Mediterranean Countries in 2000, 2009 and 2015

Country	Tourism receipts in mill. \$			Change %			Expenditure per tourist 2015 \$	Receipts per inhabitant 2015 \$
	2000	2009	2015	2000-2009	2009-2015	2000-2015		
Albania	398	2,012	1,614	405.5	-19.8	305.5	427	531
Algeria	96	381	357	296.9	-6.3	271.9	209	9
Bosnia and Herzegovina	178	772	713	333.7	-7.6	300.6	1,052	185
Croatia	2,871	9,224	9,018	221.3	-2.2	214.1	711	2,090
Cyprus	2,134	2,459	2,489	15.2	1.2	16.6	936	2,064
Egypt	4,657	11,757	6,897	152.5	-41.3	48.1	755	73
France	30,981	58,543	54,003	89.0	-7.8	74.3	639	860
Greece	9,262	14,796	15,662	59.7	5.9	69.1	664	1,454
Israel	4,571	4,332	6,061	-5.2	39.9	32.6	2,165	741
Italy	28,706	41,938	39,805	46.1	-5.1	38.7	785	642
Jordan	935	3,471	4,997	271.2	44.0	434.4	1,329	611
Lebanon	742	7,157	7,087	864.6	-1.0	855.1	4,669	1,136
Libya ¹	97	99	...	2.1	...	...	...	...
Macedonia	88	232	270	163.6	16.4	206.8	556	129
Malta	754	1,116	1,367	48.0	22.5	81.3	763	3,294
Montenegro ²	...	705	947	...	34.3	...	607	1,468
Morocco	2,284	7,980	7,534	249.4	-5.6	229.9	740	224
Palestinian territories	226	410	478	81.4	16.6	111.5	1,106	99
Portugal	6,027	12,315	15,721	104.3	27.7	160.8	1,579	1,451
Serbia ²	30	989	1,322	...	33.7	4,306.7	1,168	185
Slovenia	1,016	2,735	2,697	169.2	-1.4	165.5	996	1,363
Spain	33,833	59,539	56,484	76.0	-5.1	66.9	828	1,163
Syria	1,082	3,781	...	249.4	...	...	...	...
Tunisia	1,977	3,526	1,869	78.4	-47.0	-5.5	349	168
Turkey	7,636	24,601	35,413	222.2	43.9	363.8	897	441
TOTAL	140,581	274,870	272,805	95.5	-0.8	94.1	805	514

¹ Data for the number of tourism receipt are for the year 2008 instead of 2009. ² For the year 2000, data for the number of tourism receipt refer to the whole state of Serbia and Montenegro. Sources: UNWTO, *Compendium of Tourism Statistics* (Data 1999-2003, 2006-2010 and 2011-2015), 2005, 2012 and 2017 editions, UNWTO, Madrid.

than both Italy and France, which were less significantly hit by the crisis.

- b) The eastern part of the European Mediterranean has also seen proportionally high growth in tourism, especially in those countries that started at very low levels in previous periods, such as Bosnia and Herzegovina or Serbia. Tourism also grew strongly in other south-eastern European countries, including Turkey and three EU Member States: Greece, Croatia and Slovenia. The most impressive growth was registered in Albania, where the number of foreign tourists is now twelve times higher than at the turn of the new millennium, such that the country is now a respectable tourism destination. Indeed, when tourist numbers are taken into account, it outperforms states that it previously lagged far behind, such as Cyprus and Israel. Strong tourism growth can also be found in both Turkey, a country that has experienced significant demo-

graphic growth since 2000, and those countries that have seen rapid declines in their populations and strong emigration. Additionally, tourism growth rates are positive in both countries where the entire economy is growing, such as Montenegro and Albania, and Greece and Croatia, countries that were hit hard by the 2008 economic crisis.

- c) With the exception of Morocco, Arab countries in the African and Asian Mediterranean experienced a large drop in the number of tourists after significant growth in the 2000s. This is especially the case in Egypt and Tunisia, the strongest tourist destinations in the African Mediterranean, where the number of tourists fell by more than 20 per cent between 2009 and 2016, as well as in Syria and Libya, where tourism has virtually disappeared due to the wars. The decline in tourism is also evident in other Arab states, both in Lebanon and Jordan, which have some-

what developed tourism industries, and in Algeria, which has just begun to open up to tourism. Seeing that, with the exception of Syria and Libya, these countries are experiencing high demographic and economic growth, it is clear that this decline is primarily due to the Arab Spring. In this regard, it is worth noting that Morocco, despite registering the greatest tourism growth of all the Arab Mediterranean countries, is following unfavourable demographic and economic trends, not only compared to Algeria, where tourism has never played a significant role, but also Egypt, where the tourism sector is experiencing major problems.

In light of the listed differences, it is clear that over the entire period from 2000 to 2015, tourism in the Mediterranean grew the most in the north-eastern part of the region. The strong tourism growth in the eastern European Mediterranean is partly due to the redirection of tourists who previously went to Egypt and Tunisia, but also to improvements in the security situation in the aftermath of the wars in the former Yugoslavia. In recent years, most south-eastern European countries generally became safer than western Europe, especially France and Germany, which have been exposed to terrorist attacks and problems with large immigrant populations from Islamic countries in Africa and Asia. Another significant pull factor for tourism in south-eastern Europe is the more competitive prices, which have emerged as an important consideration given the economic crisis in the EU, the main tourist market for the whole Mediterranean region.

Turbulent events have had a strong impact on tourism, one of the most important industries throughout the Mediterranean, especially in those countries in which it is the main economic activity

The consequences of these trends for the sustainability of tourism development in the Mediterranean are also different for each of the three groups of

Mediterranean countries, although the numerous specificities of individual states and areas within them must be taken into account. In this context, special importance should be given to countries primarily oriented towards beach tourism on the Mediterranean coast, including most of the eastern European Mediterranean, as can be seen in Table 10. It is especially the case in Greece, Croatia, Albania, Cyprus and Montenegro and, to a lesser extent Turkey, while in the other Mediterranean states, tourism is highly concentrated on the coasts only in Malta and Tunisia and, to a lesser extent, Spain, Italy and Israel. However, problems of tourism concentration in coastal areas can also be found in countries in which tourism is not primarily focused on the Mediterranean coast, such as Egypt or France, as well as in countries that have very short coastlines, such as Slovenia and Bosnia and Herzegovina.

In Egypt and Tunisia, the number of tourists fell by more than 20 per cent between 2009 and 2016

One important indicator of the growing pressure on the natural environment in the Mediterranean is the increase in airplane passengers, as shown in Table 11. In the last ten years, this growth has also been highest in the eastern European Mediterranean, especially in Croatia and Montenegro. A significant increase in the number of airplane passengers was also seen in Morocco, as well as in certain Asian and African Mediterranean countries that did not register significant growth in tourism as a whole, such as Egypt, Lebanon or Algeria. The growth of low-cost airlines and the renovation of airports, such as the one in Alexandria in Egypt, should also be taken into account. Although the growth in airplane traffic in the western part of the Mediterranean was significantly weaker, there were differences in specific areas. The highest growth was registered in regions that have historically been less developed in terms of tourism, such as the southern Adriatic coast of Italy, while air traffic increased the least in the two main French tourism

TABLE 11

Number of Passengers at Airports Located Less than 100 Kilometres from the Mediterranean Coast

State / region (airports with 100,000 or more passengers in brackets)	Total number of passengers			Change %		
	2000	2009	2015	2000-2009	2009-2015	2000-2015
Spain - Andalusia and Melilla (Malaga, Almeria, Jerez de la Frontera, Granada-Jaen, Melilla)	11,767,528	14,975,390	19,592,293	27.3	30.8	66.5
Spain - Valencia and Murcia (Valencia, Alicante, Murcia)	8,411,957	15,519,140	19,241,029	84.5	24.0	128.7
Spain - Balearic Islands (Palma de Mallorca, Ibiza, Menorca)	26,650,293	28,209,526	36,848,862	5.9	30.6	38.3
Spain - Catalonia / Barcelona (Barcelona, Girona, Reus)	21,167,650	34,415,267	46,637,067	62.6	35.5	120.3
France - Occitanie (Montpellier, Perpignan, Carcassonne, Béziers, Nîmes)	2,733,337	2,372,118	2,715,706	-13.2	14.5	-0.6
France - Provence-Alpes-Côte d'Azur (Nice, Marseilles, Toulon)	16,556,441	17,697,756	21,453,936	6.9	21.2	29.6
France - Corsica (Ajaccio, Bastia, Figari, Calvi)	2,212,419	2,503,239	3,349,413	13.1	33.8	51.4
Italy - Tuscany, Liguria and Piedmont (Pisa, Florence, Genoa, Cuneo)	3,825,663	6,963,966	8,910,999	82.0	28.0	132.9
Italy - Lazio / Rome (Rome Fiumicino, Rome Ciampino)	27,117,643	38,565,915	47,140,468	42.2	22.2	73.8
Italy - Campania and Calabria (Naples, Lamezia Terme, Reggio Calabria, Crotona)	5,463,046	7,451,333	10,059,392	36.4	35.0	84.1
Italy - Sicily (Catania, Palermo, Trapani, Comiso, Lampedusa, Pantelleria)	7,393,302	11,699,011	15,551,570	58.2	32.9	110.3
Italy - Sardinia (Cagliari, Olbia, Alghero)	4,068,064	6,534,526	7,587,521	60.6	16.1	86.5
Italy - Puglia and Abruzzo (Bari, Brindisi, Pescara)	1,980,157	4,325,771	7,224,523	118.5	67.0	264.8
Italy - Emilia-Romagna and Marche (Bologna, Rimini, Forli, Ancona)	3,959,391	6,114,379	8,403,320	54.4	37.4	112.2
Italy - Veneto and Friuli-Venezia Giulia (Venice, Treviso, Trieste)	4,991,715	9,180,923	12,986,554	83.9	41.5	160.2
Malta (Malta)	3,004,714	2,918,664	5,080,071	-2.9	74.1	69.1
Croatia (Split, Dubrovnik, Zadar, Pula, Rijeka)	1,079,987	2,861,663	5,377,124	165.0	87.9	397.9
Montenegro (Tivat, Podgorica)	696,678	982,532	1,855,836	41.0	88.9	166.4
Albania (Tirana) ¹	785,000	1,394,688	1,997,044	77.7	43.2	154.4
Greece - Ionian Islands and Epirus (Corfu, Zakynthos, Kefallinia, Preveza, Ioannina) ²	3,742,000	3,498,000	5,328,404	-6.5	52.3	42.4
Greece - Attica and the Peloponnese (Athens, Patras, Kalamata) ²	12,010,448	16,383,589	20,377,368	36.4	24.4	69.7
Greece - Crete (Heraklion, Chania) ²	6,492,726	6,847,840	9,854,160	5.5	43.9	51.8
Greece - Aegean Islands (Rhodes, Kos, Santorini, Mykonos, Mytilene, Samos, Karpathos, Chios, Lemnos) ²	7,213,175	7,708,111	10,886,116	6.9	41.2	50.9
Greece - Macedonia, Thrace and Thessaly (Thessaloniki, Skiathos, Kavala, Alexandroupolis) ²	4,409,027	4,985,195	6,868,791	13.1	37.8	55.8
Turkey - Aegean (Izmir, Dalaman, Bodrum, Balikesir, Çanakkale)	5,610,050	12,349,941	20,695,048	120.1	67.6	268.9
Turkey - Mediterranean (Antalya, Alanya, Adana, Hatay)	8,405,474	21,512,170	26,708,664	155.9	24.2	217.8
Cyprus (Larnaca, Ercan, Paphos) ¹	7,764,915	9,053,235	12,414,729	16.6	37.1	59.9
Lebanon (Beirut)	2,343,387	4,952,899	7,203,781	111.4	45.4	207.4
Israel (Tel Aviv Ben Gurion, Tel Aviv Sde Dov, Haifa)	10,849,076	11,638,477	18,750,730	7.3	61.1	72.8
Egypt [*] (Alexandria, Borg El-Arab)	263,491	1,514,017	2,788,710	474.6	84.2	958.4
Tunisia (Tunis, Enfidha, Djerba, Monastir)	9,435,103	11,046,316	11,465,757	17.1	3.8	21.5
Algeria (Algiers, Oran, Bejaia) ¹	3,775,701	5,795,623	8,282,702	53.5	42.9	119.4
Morocco (Tangier, Nador, Oujda)	531,628	1,106,880	2,035,163	108.2	83.9	282.8
TOTAL MEDITERRANEAN	236,711,186	333,078,100	445,672,851	40.7	33.8	88.3

¹ Data for the number of passengers are for the year 2015 instead of 2016. ² Some data for the number of passengers are for the years 2002 and 2004 instead of 2000. Sources: Airports Council International, www.aci.aero/; internal data from the Institute for Tourism Zagreb and national statistics.

regions of Provence and Occitanie, as well as in the Balearic Islands, the area with the highest tourism concentration in Spain.

In line with these developments, since 2000, the state of environmental sustainability has declined the most in countries in the eastern European Mediterra-

nean, and much less in countries with more developed tourism industries, such as Spain, France and Italy, although a proportionally larger share of the Mediterranean coastline is filled with tourism infrastructure in these three countries than in most of the eastern European Mediterranean ones. Unfortunately, in Turkey, Greece, Croatia, Montenegro and, especially, Albania, insufficient sensitivity has been shown towards the environmental aspects of the rapid expansion of tourism. As a result, in the last twenty years these countries have been exposed to very intense and, for the most part, unplanned development of tourism infrastructure and secondary residences along a substantial proportion of their coastlines, repeating the numerous mistakes made by western European Mediterranean countries in the past.

Special importance should be given to countries primarily oriented towards beach tourism on the Mediterranean coast

The widespread perception that tourism has an overwhelmingly positive impact on the sociocultural and economic spheres, the other two primary pillars of sustainability, has led to declines in its environmental sustainability. This is especially true in Albania, Montenegro and Turkey, which are currently undergoing processes of very strong demographic and economic growth in coastal areas as a result of tourism, with the corresponding demographic and economic decline in inland regions. In these countries, tourism jobs are still considered more desirable than most other types of jobs, despite the relatively low salaries compared to developed European countries and the seasonal nature of the employment. In recent years, this has also been the case even in comparatively more developed countries, such as Greece and Croatia, where the economic crisis led to job loss and a drastic decrease in salaries in almost all basic types of jobs other than tourism. It is to be expected that sensitivity to the negative impacts of tourism would be even less pronounced in the African part of the Mediterranean, where many tourism jobs were lost due to the Arab Spring, and doubt has

been cast on the continued profitability of existing tourist businesses due to the drastic price cuts implemented to stay in business.

Challenges of Future Sustainable Tourism Development in the Mediterranean in Light of the New Circumstances

Although tourism continues to grow in the Mediterranean in the new millennium, especially in the eastern European part, compared to other regions of the world, this growth is much weaker. For example, the number of foreign tourists in the Mediterranean in the 2000-2015 period increased by 44%, a rate similar to that found in the regions of western Europe, North America and the Caribbean, with the lowest growth being registered in countries in which sustainability was jeopardized in many areas due to intensive development in the past. At the same time, in areas of Sub-Saharan Africa, South Asia, the Far East, Southeast Asia and Central America, tourism more than doubled, although it should be borne in mind that many destinations carried out large projects of dubious environmental sustainability, which were only moderately resisted due to the economic benefits of tourism.

Excessive development of tourist infrastructure has not been stopped, despite widespread awareness of the numerous negative consequences of this form of development, primarily, low utilization and occupation of large and valuable tracts of coastline

Significant resistance to the expansion of tourism in the Mediterranean occurred mainly in specific areas of extremely high pressure, mostly consisting of exceptionally attractive urban areas. This was especially true in cities exposed to large numbers of cruise ships, such as Barcelona in Spain, Venice in Italy, Dubrovnik in Croatia or Rhodes in Greece. In-

creasingly, there is resistance to the development of tourist apartments and secondary residences in coastal areas, which are seen as an especially aggressive form of endangering the environment that has been too often ignored in the past. However, excessive development of tourist infrastructure and apartments, such as on the Costa del Sol or in the Balearic Islands in Spain or on the Adriatic coast of Italy, continues on the Mediterranean coast of Croatia, Montenegro, Albania, Egypt and other countries, often in even worse forms due to unplanned expansion and poor-quality buildings. Unfortunately, this has not been stopped, despite widespread awareness of the numerous negative consequences of this form of development, primarily, low utilization and occupation of large and valuable tracts of coastline, as well as the fact that excessive development of such infrastructure and overestimation of its value were one of the causes of the economic crisis in Mediterranean EU Member States in the first place.

In light of the above, it can be concluded that these processes will continue, but that increased awareness of environmental issues and even greater awareness of their negative economic effects will partially mitigate them. It is also to be expected that the overall demographic and economic trends in the European Mediterranean will result in slower tourism growth compared to other regions of the world. Finally, there is a danger that the political situation could worsen, especially in the hitherto fastest-growing area in terms of tourism, the eastern European Mediterranean, due to increasing ethnic tensions, especially in Kosovo, Bosnia and Herzegovina, and Macedonia, along with the existing problems in Turkey due to the effects of the wars in neighbouring Syria and Iraq. However, this does not mean that these countries, like any other Medi-

terranean country, should ignore the negative impact of tourism, especially excessive construction in coastal areas, the primary tourism resource for the whole Mediterranean.

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