

# Tourism Competition in the Mediterranean Region

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Since the second half of the 1950s, Europeans from the centre and North of the continent return to the Mediterranean each year to find the eternal elixir of relaxation and entertainment on and around its beaches. For several years now, this phenomenon has consolidated the business of sun, sea and sand in the Mediterranean; what is now happening is that, despite this consolidation, various countries and destinations of the Mediterranean basin are experiencing continual reductions in visitors. This was also the case last year. There are three possible causes: the first is the presence of endogenous factors in the destinations which prevent them from offering what the market demands; the second is the presence of exogenous factors which put negative pressure on certain places, and the third refers to the development model of sun, sea and sand, which needs a complete overhaul. It could also occur that all three factors coincide.

### The Tourism Situation in the Mediterranean

This travel phenomenon takes place mainly in July and August, although the coast still receives many travellers during the weeks beforehand and those imme-

diately afterwards. At the beginning, the ritual of sun, sea and sand focused on the summer season was conducted by just a few pioneers who went to the seaside discovering a range of contrasts of climate, customs and exoticism. Very soon the pioneers became millions. Half a century has passed and a vast mass tourism movement has been forged in and around the Mediterranean which does not stop growing. This sea was the target of the package holiday and around it the first tourism revolution has taken place. Within the welfare society, tourism of sun, sea and sand has become part of the daily lives of Europeans, taking on a determining role.

In the 1990s another trend followed the great monothematic wave of going to the beach in summer; this time, the Europeans' holiday exodus was directed towards the cities. A resultant loss of seasonality meant the season lasts all year rather than focusing on a few months of the year. Traditionally Paris and London were the great European capitals to be flooded with visitors. Barcelona, Milan, Berlin, Rome, Amsterdam, Brussels, Prague, Budapest and Saint Petersburg are other attractive cities which became added to this list. The *city break*, has consolidated and has been installed in Europe for the last ten years, representing millions of short visits to eternal cities with their roots, their restoration, their modernity and their fusions.

Finally, over the last few years a third mass movement has been unleashed in Europe – towards the interior. The aim of these trips is to discover or rediscover rural areas, mountains, adventure and

trekking, among others. Now at the phase of final structuring, this third major vacation trend is progressing in Europe.

### Endogenous Factors

These are the three milestones of mass tourism that started on Mediterranean beaches some fifty years ago. But the changes in the way Europeans spend their free time have accelerated over the last decade in two major aspects, which we have been able to capture from the results of a survey carried out at ESADE's Centro de Dirección Turística:<sup>1</sup>

- From a single motivation, the beach, we have passed to a dispersed and rich multi-motivational situation, which is carried out on the beach as well as in the cities and in the interior. In this manner, these three leisure spaces open up to culture, sport, open air activities, events, relationships, gastronomy, conference and business travel, etc.
- And from one main holiday (and in the majority of cases a long summer holiday taken all in one go, lasting several weeks) the trend has passed to a much shorter holiday, to an average of eight days, to several short holidays, to a few weekend trips and to several days of excursions organised throughout the year. This has forged a double process: on one hand, a significant increase in the number of trips made by Europeans (in the case of Spain this could have duplicated over the last three years from an average

<sup>1</sup> SUREDA, J., VALLS, J.-F., (2001) "Comparison of European Leisure-Types: Germany, France, Italy, Great Britain, Portugal and Spain," XI Simposio Internacional Turismo, ESADE.

of two to four trips per year)<sup>2</sup> and, on the other, an extraordinary loss of seasonality in Europeans' holidays.

It turns out that the absolute majority of the tourist infrastructure in the Mediterranean focuses on the first mile surrounding the coast, designed for a sun, sea and sand type of satisfaction. Moreover, construction is still taking place under the perspective of this model in the entire Mediterranean basin in the same way as it has for decades, as if sun, sea and sand were still the only leisure motivations Europeans have. If many more motivations exist and, therefore, less interest in the traditional format of sun, sea and sand, and the number of days of stay on the coast is reduced, therefore focusing more on the summer season, we have to ask ourselves not just how the tourist infrastructure supports itself, but also how it is increasing while it is based on a holiday model, that is over-dimensioned for the new existing supply. Faced with this series of endogenous factors, the setting of certain criteria for restructuring what is on offer is established, taking into account that Europeans demand very different things from leisure spaces. A radically different redefinition of planning is required.

### Exogenous Factors

At exogenous level, the Balkan wars threw the whole of Europe into confusion during the nineties, and its Mediterranean coastal area put itself out of business as a destination for sun, sea and sand during the war and for quite some time afterwards. The same has happened as a result of the wars in Afghanistan and Iraq. The border areas beyond Turkey and all the Arab countries which have a coastline on the Mediterranean shore have been heavily penalised. Both military phenomena have had a negative impact in the affected area of the coast, whilst other coastal destinations benefited from the situation. Spain has benefited a great deal in both cases. During periods of military conflict, tourist destinations divide into critical (heavily penalised by it) and into refuge (welcoming

**MEDITERRANEAN COUNTRIES WITHIN WORLDWIDE TOURISM**

Ranking of the top 10 countries by tourist income and by number of international tourists and Mediterranean countries situated amongst the top 100.

**TABLE 14** Mediterranean countries within worldwide tourism

Position	Income (in millions of dollars)	Position	Arrivals of international tourists (in thousands)
1	USA	1	France
2	Spain	2	Spain
3	France	3	USA
4	Italy	4	Italy
5	China	5	China
6	Germany	6	Great Britain
7	Great Britain	7	Canada
8	Turkey	8	Mexico
9	Austria	9	Austria
10	Greece	10	Germany
21	Portugal	12	Greece
29	Croatia	15	Turkey
31	Egypt	16	Portugal
42	Morocco	24	Croatia
46	Cyprus	33	Tunisia
52	Syria	35	Egypt
53	Tunisia	38	Morocco
58	Israel	49	Syria
60	Slovenia	53	Cyprus
63	Lebanon	59	Jordan
67	Jordan	66	Slovenia
78	Malta	69	Malta
81	Albania	73	Algeria
		74	Lebanon
		80	Israel

Own production. Source: UNCTAD, [www.unctad.org](http://www.unctad.org)

those tourists who are afraid to go to the affected areas). Once the effect of the first military action and the process of getting over the second is finalised, the Balkan countries, Turkey and the traditional Arab states are emerging as much cheaper tourist destinations as a consequence of a series of factors, amongst which cheaper labour costs, raw materials and land prices stand out, as well as the implementation of new cost-cutting technologies. Whilst all the destinations adapt

to the new demands of Europeans, a clear segmentation of the Mediterranean coast is asserted in the search for differentiation. It would be an error for the most mature destinations to compete by price with those which are emerging or that the latter wish to compete with the former in aspects such as high quality or the process of creating a service. Price and quality factors determine very different markets at present, despite the fact we are immersed in the wave of low cost products.

<sup>2</sup> VALLS, J.-F.(2005), "Review of Spanish Leisure-Types," Centre for Tourism Management, ESADE.

## Correction of the Model

The exogenous and endogenous factors dealt with alone or as a whole would not sufficiently justify an answer to the real situation of tourism in the Mediterranean. We have to refer to the model of intensive coastal tourist development which has offered cheap package holidays from the very beginning. The model observes signs of exhaustion in a series of aspects, such as the abuse of territory and heritage, the excessive population density, the high seasonality, the historical specialization of the sun, sea and sand market in the low cost segment and the segregation of the tourist population from the residential population, which can lead to frictions in certain destinations.

The correction of the model will have to pass through a series of active policies in each destination, as well as in each

State. These are the aims of the change of model:

- not to continue building on the coast on the basis of an obsolete vacation model
- not to overload the first mile of the coastline, but instead to start structuring destinations facing the coast by opening up towards the interior where all kinds of products can complement each other, including the city and interior spaces
- to create more open spaces in the coastal area
- to seek sustainability of tourist businesses based on the fact that the activity itself does not just generate the necessary funds to support the environmental erosion that the visitors cause, but also all those derived from the constant improvements in tourist products. In this way, the total recov-

ery of the sea becomes the most immediate objective of all the countries which live off tourism in this area.

Currently, various inter-Mediterranean policies with coinciding objectives are being developed. Various community programmes exist which result directly or indirectly in tourism from fields such as agriculture, the environment, the marine environment, forestry, fishing, the development of small and medium-sized enterprises, technologies and innovation. However, the lack of a defined and shared European tourist policy amongst the main outbound countries and the main recipient countries has up to now prevented the EU from considering one of its primordial aspects – that of a Mediterranean tourist policy that takes into account integrally the largest and most desirable leisure space for Europeans.