

Good Performances of Mediterranean Tourism Despite uncertainties

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Although worldwide tourism may have enjoyed a slight growth in 2003,¹ constant pressure on prices means that the same cannot be said for its earnings. 2002 had already been a difficult year, but international tourism had endured it well. Surprisingly, the best results were reported in the Mediterranean and the Middle East, where an increasing number of countries are successfully opening up to tourism, and the demand for intra-regional tourism is increasing rapidly.

Mediterranean tourism has continued its growth despite the uncertainties that have continued to dominate the markets as a result of the threat of further terrorist attacks, the war in Iraq and, in particular, the heat wave in western Europe and the SARS epidemic. As has been highlighted by the World Tourism Organisation (WTO, which is based in Madrid and is in the process of becoming an agency of the United Nations, in the same way as the UNESCO, the ILO and the UNEP), «Moreover, the expected economic recovery has not taken place as rapidly as expected, which has affected some of the major source markets, among others. The main result of this unfavourable context has been to accentuate the reorientation of demand towards travelling to well-known destinations within

tourists' own countries, which are closer to their homes and enable them to make their journeys by car, coach or train, rather than by air. Consumers have adopted a wait-and-see attitude, which has put pressure on prices and given rise to last-minute bookings».

Mediterranean and Arab countries have benefited from this trend, and the prospects for the development of Mediterranean tourism therefore appear promising, while investments abound. With Arab or European capital, Euro-mediterranean globalisation is a reality. Let us consider the examples of Arab property developers establishing themselves in Andalusia, or European businessmen investing in the hotel trade and leisure services on the southern and eastern shores of the Mediterranean.

Spanish entrepreneurs in particular are in the process of establishing a strong foothold in North Africa and the Middle East. Meanwhile, there is evidence of significant concentration in the travel industry in Spain: in 2003 Marsans and Globalia took over as the two leading Spanish travel agency networks, and investments made by hotel chains, such as Vinci, NH, AC and Sol Melia, are set to make Spain one of the principal driving forces behind Mediterranean tourism, both within the country and beyond its shores, extending throughout the entire Mediterranean basin. A further example can be seen in the encouragement of Andalusia's regional government of the promotion of investment in northern Morocco on the part of Andalusian entrepreneurs.

The Inhabitants of the Mediterranean and Middle East Travel More and More Frequently

A careful examination of statistical data corresponding to 2002 and 2003 for the Euromediterranean and Middle Eastern area reveals various surprising details. The figures concerning journeys by air have stabilised in the Mediterranean, and there has been a substantial increase in those undertaken by car. The vast majority of international journeys are made within the region of origin and account for four fifths of the total thereof. While inter-regional travel tends to have a faster rate of growth than intra-regional travel in normal times, the opposite has been true over the last two years.

Rather than the traditional European and American markets, it is actually those of the Middle East that have made this growth in tourism possible, with national and intra-regional tourism being highly developed in this part of the world. This has significant sociological consequences, such as making it henceforth the norm for middle and upper class citizens of these countries to travel. With balanced economic development, leisure and holidays will become priorities for these segments of the population. A growth in tourism on a par with those experienced in western Europe in the 1960s and 1970s and in eastern Europe since 1995 is therefore guaranteed.

The role of the internet as a means of organising and booking transport and accommodation, or of making complete travel arrangements, rather than

¹ Detailed results for 2003 will be available to the WTO midway through 2004.

as just a source of information, has been consolidated. Independent travel has increased significantly, and the tour operators, who now find themselves somewhat ignored, have been experiencing a rather difficult period. Nevertheless, the European EUMEDIS programmes geared to tourism appear to be enduring more difficulties than were anticipated. There is still no genuine desire for cooperation with a view to coordinating information and helping entrepreneurs to improve their positions on the internet in this field.

One of the outstanding aspects of tourism in the Middle East and North Africa is the emphasis on culture and history. With the exception of Saudi Arabia, which obstructs the revealing of information about anything related to the «times of ignorance», all the other Arab countries are in the process of putting emphasis on archaeological discoveries of kingdoms and societies that existed prior to the Hijra. Algeria is rediscovering Saint Augustine, while the United Arab Emirates are very keen to show that that part of Arabia was not a historical cul-de-sac, and a great deal of archaeological activity is taking place there. Tunisia is one of the leaders of the Strabon project, which is geared to making it possible to post comprehensive information on the internet regarding Mediterranean cultural heritage.

For its part, Algeria is preparing for significant changes to its tourism policies. While the Great South is still an essential factor with regard to the tourist revival, despite the hostage crisis, a choice has been made at the highest level to emphasise the sustainable development of the north. A blueprint for a law on the sustainable development of tourism has just been successfully passed in the Algerian Parliament. Cultural tourism based on the heritage treasures from the Roman and Byzantine eras is being increasingly enriched by the exploitation and museographical representation of the Islamic culture (mosques, marabout sites, holy places of the Muslim religion, civil monuments and palaces from the Middle Ages). Spanish tourism thrives on similar resources in Granada and Cordova, while Egyptian tourism offers a great diversity of such attractions in Cairo. Islamic art has made an enor-

mous contribution to the Turkish tourist industry, which receives visits from thousands of westerners, who enthralled by Sufism, come to visit its most sacred sites. This cultural tourism throws up no end of surprising facts. Take the region's culinary peculiarities, for example: «Coffee beans were found in Kush in the U.A.E, some two centuries before the first historically documented references to coffee being used and traded were made.» (*Le Monde*, 21st February 2003).

Attributing Greater Significance to Marketing and Training

In this respect, Egyptian leaders have perceived that tourism is, first and foremost, all about marketing. Despite terrorism and the Iraqi crisis, their promotional campaigns have been fruitful. President Mubarak himself deals with the issue of tourism, as he is aware that the industry provides a direct or indirect living for more than twenty percent of the population of his country. In Jordan, tourism is taking on priority status with regard to communication links, and the Agaba duty-free zone, to which President Bush paid a special visit, could become a second Dubai in the Middle East.

Other Mediterranean countries could follow Egypt's example. The budgets of Mediterranean and Arab countries' national tourist boards pale into insignificance in comparison the figures at stake. Only Dubai has been successful in this respect, with a growth of thirty percent owing to the full involvement of partnerships between the public and private sectors. This is also the case in Lebanon, where the influx of international tourists has risen despite the crisis, mainly as a result of Arab tourism.

As far as the job market is concerned, Mediterranean and Middle Eastern tourism suffers from a chronic lack of well-trained labour. If the Middle East can be remodelled in conditions of stability and peace, economic development will bring an even greater growth in tourism, due to the leverage effects attributable to the positive elasticity of this sector of activity.

Requirements in terms of training are enormous, as was underlined at the

third Euromediterranean Tourism Forum, organised by Mediterranean Dialogue and the EAMS (EuroArab Management School, a project of the League of Arab States and the Spanish Agency for International Cooperation, or AECI, which is based in Granada), and which took place in Madrid in January 2003 during the FITUR International Tourism Fair.

Training requirements amount to hundreds of thousands, and training in modern management techniques adds up to tens of thousands. Projects are few and financing them is difficult due to the eastern and southern Mediterranean countries' lack of means. Only a partnership between the public and private sectors and consolidated international cooperation could compensate for this. This is the aim of the Euro-Arab Management School, which has just begun a series of master's degree programmes in the field of tourism, the validation of which would be recognised on a European scale. This objective is also partly shared by the Bocconi University in Milan, thanks to a series of grants approved by the Italian government in connection with the World Tourism Organisation.

The Committee for the Revival of Mediterranean Tourism

On 1st March 2002, the Declaration for the Revival of Tourism in the Mediterranean Region was signed in Tunisia. As a joint initiative of Spain and Tunisia with the backing of the Professional Council of the WTO, its main recommendation was to support the creation of a Euromediterranean development bank. However, the initiative has wavered, and there has been scant follow-up in 2003. In reality, the EMTO (Euromediterranean Tourism Organisation) would have to be relaunched for real progress to be made as regards horizontal cooperation where Mediterranean tourism is concerned.

The Mediterranean is the only region in the world where such cooperation does not exist. Of course, the WTO is omnipresent in Spain, but marketers are opposed to such cooperation, as it would be of significant benefit to the southern and eastern Mediterranean countries, destinations that are in

competition with the countries on the northern shores, one of which is Spain. Spain, France, Italy and Greece alone represent almost a quarter of the world's tourism. If the development of Mediterranean societies over the next fifteen years is to be organised on the basis of catering for the substantial need for employment (at least thirty-four million),

tourism could serve as an engine for consolidating macroeconomic stabilisation and for reinforcing competitiveness in terms of trade and the appeal of capital.

Mediterranean tourism is performing satisfactorily. With peace and stability, it has a bright future. However, will be capable of taking the new paths

that will allow for the development of sustainable tourism in accordance with natural and human resources and social and economic development? This choice must be made quickly by the relevant governments and local authorities, as they attempt to strengthen north-south and south-south cooperation.

HIGHLIGHTED LINKS ON TOURISM IN THE MEDITERRANEAN

World Tourism Organisation, WTO,
www.world-tourism.org

Initiative of the European Commission for
Tourism to promote tourism in Europe
<http://www.visiteurope.com>

Mediterranean tourism forum: MEDITOUR
<http://www.meditour2003.com>

MEDSTAT programme, MED-Tour statistical
cooperation subprogramme,

[http://europa.eu.int/comm/eurostat/Public/
datashop/print-product/EN?catalogue=
Eurostat&product=siteweb-EN&file=med_
tour.htm](http://europa.eu.int/comm/eurostat/Public/datashop/print-product/EN?catalogue=Eurostat&product=siteweb-EN&file=med_tour.htm)

Tourism - Europe, central European countries,
Mediterranean countries, EUROS-TAT,

[http://www.eu-datashop.de/download/EN/
inhaltsv/thema4/touri.pdf](http://www.eu-datashop.de/download/EN/inhaltsv/thema4/touri.pdf)

Ibertur Network,
www.gestioncultural.org/ibertur

MED PROJECT ULIXES 21, Programme for
Sustainable Tourism in the Mediterranean,
<http://www.medforum.org/ulixes21/>

Declaration on Tourism and Sustainable De-
velopment in the Mediterranean, Calvia
[http://www.un.org/esa/sustdev/mgroups/
success/tour8.htm](http://www.un.org/esa/sustdev/mgroups/success/tour8.htm)