

# The Future of Mediterranean Tourism in a (Post) Covid World. Back to Mass Tourism or Leapfrog towards Sustainability?

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Mediterranean tourism, severely impacted by the Covid-19 pandemic, is now at a crossroads. It can either shift towards greener and more inclusive tourism patterns based on more responsible behaviour, or, alternatively, return to its previous trend of uncontrolled mass tourism, causing the dramatic degradation of sensitive natural ecosystems, alterations of cultural heritage and little in the way of benefit to the local communities. Ambitious, green and inclusive recovery roadmaps, both at local, national and regional level are therefore strongly needed to ensure a positive future for Mediterranean tourism and contribute to a prosperous, inclusive and sustainable region.

## **Mediterranean Tourism: A Major Economic Sector in Transition**

The Mediterranean region has unique natural ecosystems and offers an amazing diversity of cultural and historical heritage. It benefits from mild climatic conditions and populated and well-connected locations, making it a sought-after travel spot. In 2019, just before the pandemic, the Mediterranean region

was registering more than 400 million international tourist arrivals (ITAs) every year, as one of the world's most popular destinations. The tourism sector accounted for up to 15% of regional GDP,<sup>1</sup> with 75% growth since 1995, expected to reach 626 million ITAs by 2025 according to the UN World Tourism Organization (WTO).

## **A Negative Loop between Mass Tourism and Socio-Environmental Sustainability**

The tourism sector as it stood pre-pandemic was highly unsustainable. Transport, motivated by leisure, personal or work purposes, is the biggest carbon emitting sector across the European Union, accounting for between 15 to 40% of countries' CO<sub>2</sub> equivalent emissions. Maritime transportation represents nearly 4% of this number.<sup>2</sup> On a global scale, carbon emissions from tourism are estimated to be roughly 8% of total carbon emissions, mainly due to (air) transport, growing year after year.<sup>3</sup>

The Mediterranean Sea hosts up to 9% of the world's marine biodiversity of which around 30% are endemic species. However, 51% of native marine fish species are in danger of extinction and 4% are listed as near threatened,<sup>4</sup> due to the loss of habitats from unsustainable exploitation of resources, pollution, climate change, eutrophication and invasive marine species.<sup>5</sup> Yet biodiversity is fundamental to

<sup>1</sup> World Travel & Tourism Council (WTTC), 2017 data, direct and indirect contribution of tourism to GDP. <https://wtcc.org/>

<sup>2</sup> EUROPEAN ENVIRONMENTAL AGENCY, *Transport emissions of greenhouse gases*, 2018. [www.eea.europa.eu/data-and-maps/indicators/transport-emissions-of-greenhouse-gases/transport-emissions-of-greenhouse-gases-12](http://www.eea.europa.eu/data-and-maps/indicators/transport-emissions-of-greenhouse-gases/transport-emissions-of-greenhouse-gases-12)

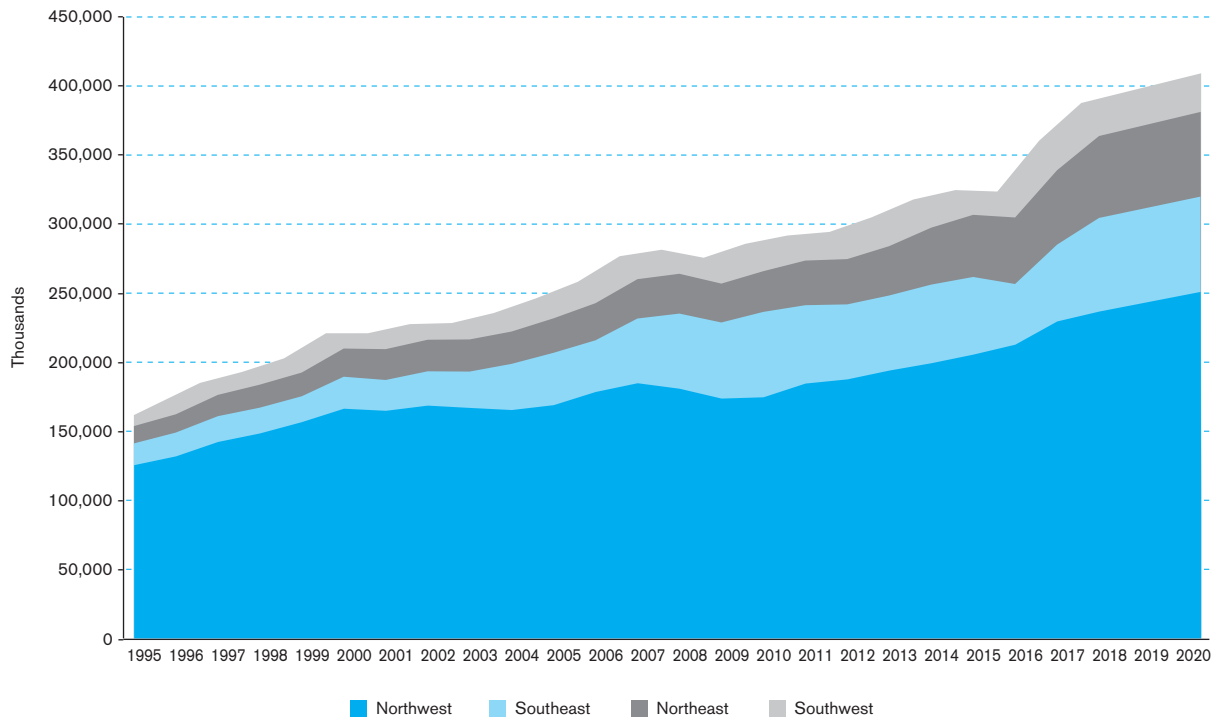
<sup>3</sup> LENZEN, M.; SUN, Y.Y.; FATURAY, F. et al. "The carbon footprint of global tourism." *Nature Climate Change* n. 8 (2018). [www.nature.com/articles/s41558-018-0141-x](http://www.nature.com/articles/s41558-018-0141-x)

<sup>4</sup> IUCN website: [www.iucn.org/regions/mediterranean](http://www.iucn.org/regions/mediterranean)

<sup>5</sup> COLL, M. et al., "The Biodiversity of the Mediterranean Sea: Estimates, Patterns, and Threats." *PLoS ONE*. August, 2010 <https://journals.plos.org/plosone/article?id=10.1371/journal.pone.0011842>

CHART 17

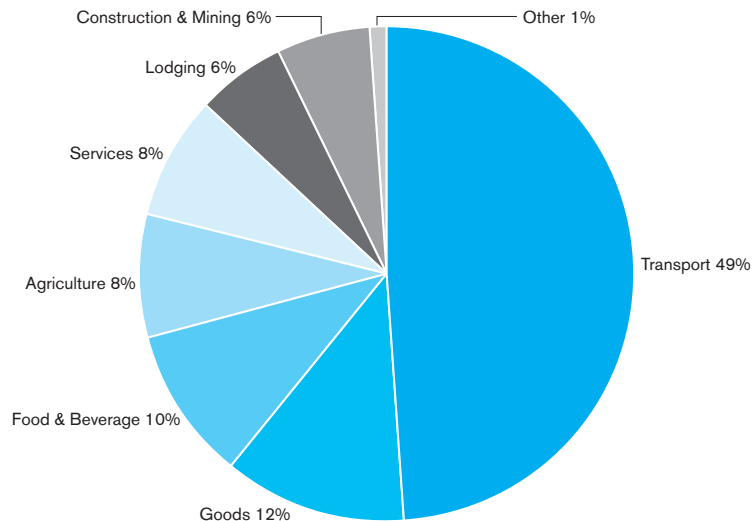
## International Tourist Arrivals (ITAs) in Mediterranean Countries (1995-2019)



Source: eco-union, based on UNWTO data.

CHART 18

## Carbon Footprint of Global Tourism



Source: Sustainable Travel International.

the Mediterranean economy, with benefits derived from ecosystem services estimated at over €26 billion a year. Of these, more than two-thirds come

from tourism.<sup>6</sup> Marine litter is also a critical issue: in some Mediterranean tourism areas, more than 75% of the annual waste production is generated during

<sup>6</sup> WWF (2017). *Reviving the Economy of the Mediterranean Sea: Actions for a sustainable future*. WWF and BCG, 2017. [wwfeu.awsassets.panda.org/downloads/reviving\\_mediterranean\\_sea\\_economy\\_full\\_rep\\_lowres.pdf](http://wwfeu.awsassets.panda.org/downloads/reviving_mediterranean_sea_economy_full_rep_lowres.pdf)

the summer.<sup>7</sup> Given the sectoral growth,<sup>8</sup> these environmental and social pressures are likely to increase if adequate regulation of tourism flows is not implemented. Given that northern Mediterranean countries are fairly long-standing tourist destinations, most of these pressures tend to be stationary, but they are likely to increase in the coming years in southern Mediterranean countries.

### Loss of Attractiveness and Climate Change Impacts

The same pressures also take their toll on the tourist industry, as they lower the attractiveness of tourist destinations.<sup>9</sup> This loss of competitiveness due to pressures from coastal tourism is evident from waste pollution, including presence of fecal water in beaches, and a degradation of flora and fauna due to water scarcity derived from tourism-related infrastructure. The development of coastal tourism infrastructure, which is especially dense from southern Spain to northern Italy, has eliminated entire ecosystems and has resulted in highly vulnerable economies that are dependent on mass tourism.<sup>10</sup>

Moreover, the Mediterranean tourism sector is exposed to growing pressures linked to the effects of climate change. Coastal erosion, for example, is already evident throughout the Mediterranean coast, especially in the southern part.<sup>11</sup> Lack of water, coastal erosion, rising sea levels are just some of the challenges that climate change poses to tourist operators and other stakeholders on the shores of the Mediterranean Sea. The most worrying impact in the medium (2030) and long term (2050) are in the eastern (Egypt, Israel, Jordan, Lebanon and Palestine) and western (Algeria, Morocco and Tunisia) southern countries.<sup>12</sup>

### Precarious, Marginalized and Unskilled Jobs

The Tourism sector is labour intensive, accounting for an average 11.5% of total employment in Mediterranean countries, according to the WTTC. It employs a high volume of both low-skilled and higher-skilled workers, with a heavy turnover from seasonal, part-time and temporary jobs, while providing employment opportunities for people usually disserved by the labour market: migrants, women, students, older workers, people in rural and coastal areas, sometimes in remote locations, who depend on these jobs to maintain their livelihoods.

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Because of the abundance of available workforce for temporary jobs in the tourist seasons and locations, the work is characterized by functional flexibility and low wages, which translates into structural insecurity for the workers. Professions in social care, facility cleaning, retail, transport, travel and tourism, leisure and hospitality suffer from low pay, poor working conditions, little to no career advancement, a lack of training and a highly gender-segregated workload for women.<sup>13</sup> A significant share of the informal sector (with street vendors and the rise of owner-to-visitor platforms for accommodation for example) is also hindering the constitution of worker's unions to better the working conditions of low-skilled tourism workers.

<sup>7</sup> GIULIETTI et al. "Tourism and the environment Towards a reporting mechanism in Europe." *EEA Report*, ETC/ULS. 2018 [www.researchgate.net/publication/324330475\\_Tourism\\_and\\_the\\_environment\\_Towards\\_a\\_reporting\\_mechanism\\_in\\_Europe](http://www.researchgate.net/publication/324330475_Tourism_and_the_environment_Towards_a_reporting_mechanism_in_Europe)

<sup>8</sup> UNWTO tourism recovery tracker: [www.unwto.org/unwto-tourism-recovery-tracker](http://www.unwto.org/unwto-tourism-recovery-tracker)

<sup>9</sup> DRIUS et al. "Tackling challenges for Mediterranean sustainable coastal tourism: An ecosystem service perspective." *Science of the Total Environment*, February, 2019. [www.sciencedirect.com/science/article/abs/pii/S0048969718340026](http://www.sciencedirect.com/science/article/abs/pii/S0048969718340026)

<sup>10</sup> GREENPEACE, *A toda Costa. Análisis de la evolución y estado de conservación de los bienes y servicios que proporcionan las costas*, 2018 <https://es.greenpeace.org/es/wp-content/uploads/sites/3/2018/07/A-Toda-Costa-Cast-DEF.pdf>

<sup>11</sup> UfM "Climate change impact on the tourism sector in the southern Mediterranean." Final Report, July 2018 [https://ufmsecretariat.org/wp-content/uploads/2018/11/UfMReport\\_ClimateChangeAndTourism.pdf](https://ufmsecretariat.org/wp-content/uploads/2018/11/UfMReport_ClimateChangeAndTourism.pdf)

<sup>12</sup> Ibid.

<sup>13</sup> OBADIĆ, Alka & PEHAR, Lorena. (2016). Employment, Capital and Seasonality in Selected Mediterranean Countries." *Zagreb International Review of Economics and Business*, vol. 19 December, 2016. [www.sciendo.com/article/10.1515/zireb-2016-0012](http://www.sciendo.com/article/10.1515/zireb-2016-0012).

## The Pandemic Shock in Mediterranean Tourism

The tourism sector has been dramatically affected in 2020 as countries worldwide imposed lockdowns and travel bans to stop the spread of the Covid-19 pandemic. During 2020 and 2021, some countries across the Mediterranean region saw a rebound of visitors, while still enduring health restrictions. However, tourists largely opted to stay within their countries of origin and avoid air travel abroad.

### An Uncertain Future for Tourism

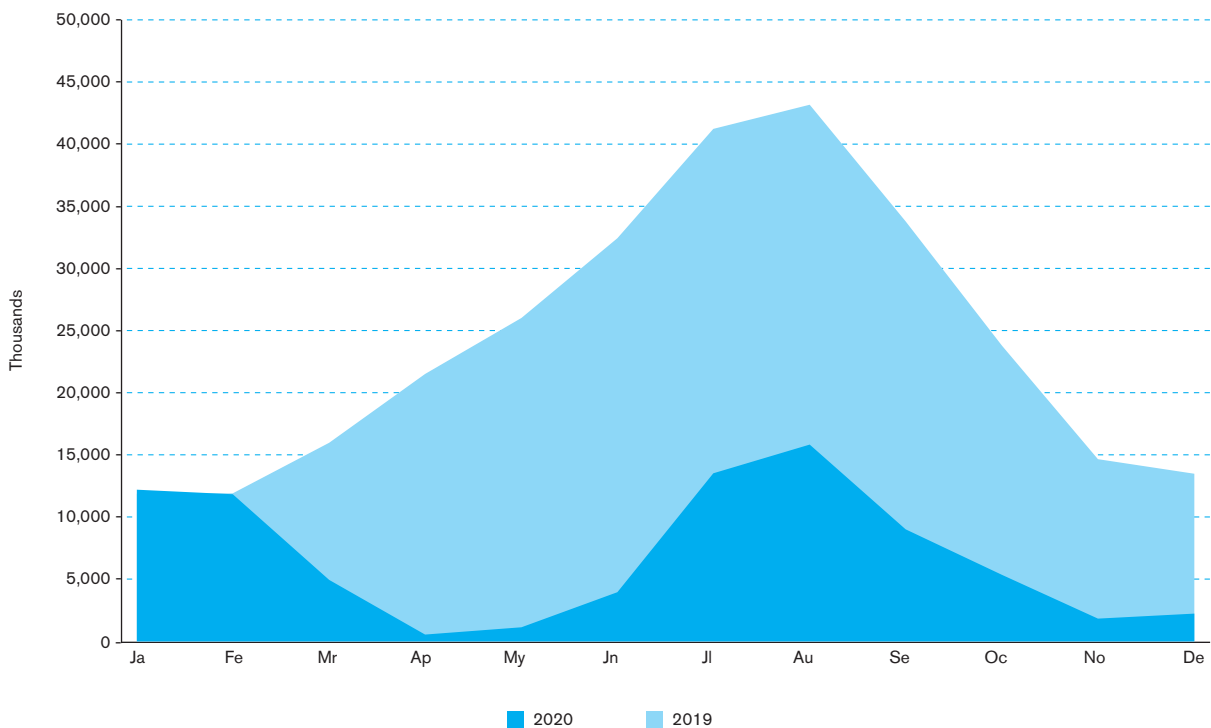
According to the United Nations World Tourism Organization (UNWTO), the return to the pre-pandemic levels of 2019 is not expected for another three to

four years.<sup>14</sup> The only steady trend in the foreseeable future is the resumption of domestic tourism within European countries. Due to travel restrictions, closed borders and the risks of transmission via air travel, intraregional and domestic tourism are prioritized by travellers.<sup>15</sup> Indeed, the OECD forecast<sup>16</sup> shows that domestic tourism is the backbone of the tourism industry, with 75% of tourism expenditure coming from internal travellers. It is domestic tourism that will drive the recovery for the industry.<sup>17</sup>

### Towards a Digital and Sustainable Transformation of Tourism

Two key directions appear for the future of the tourism sector: digitalization and sustainability. Regard-

CHART 19 International Tourism Arrivals (ITA) in European Mediterranean Countries (2019-2020)



Source: UNWTO.

<sup>14</sup> UNWTO, *International Tourism and Covid-19*, updated October 2020. [www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism](http://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism)

<sup>15</sup> UNWTO, *Market Intelligence*, 2020. [www.unwto.org/market-intelligence](http://www.unwto.org/market-intelligence)

<sup>16</sup> OECD, *OECD Tourism Trends and Policies 2020*. [www.oecd-ilibrary.org/urban-rural-and-regional-development/oecd-tourism-trends-and-policies-2020\\_6b47b985-en](http://www.oecd-ilibrary.org/urban-rural-and-regional-development/oecd-tourism-trends-and-policies-2020_6b47b985-en)

<sup>17</sup> UNWTO. "UNWTO Highlights Potential of Domestic Tourism to Help Drive Economic Recovery in Destinations Worldwide." 2020. [www.unwto.org/news/unwto-highlights-potential-of-domestic-tourism-to-help-drive-economic-recovery-in-destinations-worldwide](http://www.unwto.org/news/unwto-highlights-potential-of-domestic-tourism-to-help-drive-economic-recovery-in-destinations-worldwide)

ing sustainable tourism, national and regional tourism agencies, for their part, should promote emerging destinations, less crowded spots or nature-based locations, in order to better distribute travel flows, reduce environmental pressures and generate jobs in less-travelled areas or hinterlands. They should also integrate local communities in the tourism planning and policy process; support sustainable activities based on biodiversity or cultural values; and guarantee social rights, adequate salaries and training programmes for workers.

The integration of the Social and Solidarity Economy (SSE) in the blue economy sectors such as coastal and maritime tourism is a clear framework to align socioeconomic benefits and environmental protection, increasing local communities' resilience and ensuring long-term sustainability.<sup>18</sup> Tour operators and travel agencies should, for their part, reduce the carbon and water footprint of their supply chain, avoid food waste, eliminate single-use plastics, prioritize low-carbon transports, partner with local providers, and provide appropriate training and salaries to their workforce.

## Two key directions appear for the future of the tourism sector: digitalization and sustainability

In terms of the digitalization of tourism, storytelling tools allow for personalized, valuable experiences that shun mass tourism and favour the protection of the environment. Contactless technologies, biometrics and Artificial Intelligence are part of this trend. Moreover, digitalization, as well as reskilling and upskilling tourism workers, will create better jobs. Investing in the human capital locally is the best way to sustain a balance between quality tourism and environmental sustainability. There have to be guarantees that no workers or communities are left be-

hind in this change. To ensure this, public authorities should invest in digital competences. Additionally, digitalization has the power to better inform decision-making by making real-time information and best practices widely available: notably, the compliance of enterprises to maritime sustainability and emissions.

### A Green and Blue Recovery for the Mediterranean

At the Mediterranean level, the *Mediterranean Action Plan* (UNEP/MAP) of the Barcelona Convention for the protection of the Mediterranean Sea, ratified by 22 Mediterranean riparian countries, endorsed a *Mediterranean Strategy for Sustainable Development* (MSSD) in 2016.<sup>19</sup> This regional strategy integrates sustainable tourism as a strategic objective to be reached by 2025. However, the rather limited mandate of the Barcelona Convention towards environmental issues impedes significant progress on this cross-sectoral issue. A proposal to develop a regional sustainable tourism framework has not been advanced yet,<sup>20</sup> although the tourism sector is included in the *Sustainable Consumption and Production Regional Action Plan* (SCP RAP), which is to be implemented by southern Mediterranean countries by 2026, with rather limited impact so far.<sup>21</sup>

### Transformation towards a Sustainable and Equitable Mediterranean Tourism

Although the projects, policies and initiatives mentioned earlier are valuable and contribute, in one way or another, to sustainable tourism in the Mediterranean, they are, in general, lacking a structured and robust governance system at regional level that could ensure the necessary social and environmental transformation of the tourism sector. Tourism is a

<sup>18</sup> ECO-UNION, *Towards a Blue Solidarity Economy*, 2020. [www.ecounion.eu/en/portfolio/economia-blava-solidaria-ebs/](http://www.ecounion.eu/en/portfolio/economia-blava-solidaria-ebs/)

<sup>19</sup> UNEP/MAP, *Mediterranean Strategy for Sustainable Development 2016-25*, 2016 [www.unep.org/unepmap/what-we-do/mediterranean-strategy-sustainable-development-mssd](http://www.unep.org/unepmap/what-we-do/mediterranean-strategy-sustainable-development-mssd)

<sup>20</sup> FOSSE et al. "Sustainable Tourism in the Mediterranean: State of Play and Strategic Directions." Plan Bleu, 2017 <https://planbleu.org/en/publications/sustainable-tourism-in-the-mediterranean-state-of-play-and-strategic-directions/>

<sup>21</sup> UNEP/MAP. *Regional Action Plan on Sustainable Production and Consumption in the Mediterranean*, 2016. <https://switchmed.eu/policy/regional-action-plan-sustainable-consumption-production/>

globalized yet fragmented industry that needs to be monitored, managed and regulated at various space, time and geographic scales.<sup>22</sup> The involvement of the private sector, financial actors, academic world and civil society organizations is critical to implement significant change and take the opportunity offered by the recovery and resilience plans.<sup>23</sup> All of these measures should be multifold, involve various actors and benefit the environmental, social and economic environment in many different ways, as highlighted by the *High Level Panel for a Sustainable Ocean Economy*.<sup>24</sup>

## Conclusion

The coronavirus pandemic marked the start of a deep recession for the tourism sector, leaving Mediterranean countries and industry actors, big and small, in a dramatic situation. Public and international subsidies have attempted to remedy the severe loss of jobs and income, with poor results so far. The road to recovery is dominated by uncertainty as there is no end in sight to the pandemic. Domestic tourism has a critical role in supporting national hotels, restaurants and tour operators, while they wait for the vaccines to be administered, thereby reducing travel bans; something which could take several years. At the same time, it is crucial that the decision and policy-makers from the

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public and private sectors play their part in turning the industry into a more sustainable one, promoting positive externalities for the environment, the workers and the local communities. The massive investments provided by the recovery plans offer a unique opportunity to transform the tourism sector and ensure a better future for the whole Mediterranean region.

## Additional Information

Tourism Recovery Tracker (UNWTO): [www.unwto.org/unwto-tourism-recovery-tracker](http://www.unwto.org/unwto-tourism-recovery-tracker)

Blue Tourism Initiative (eco-union, IDDRI, ADEME): [www.ecounion.eu/en/portfolio/blue-tourism/](http://www.ecounion.eu/en/portfolio/blue-tourism/)

Tourism Policies Monitoring (OECD): [www.oecd.org/cfe/tourism/](http://www.oecd.org/cfe/tourism/)

State of Environment and Development in the Mediterranean (Plan Bleu): <https://planbleu.org/en/soed-2020-state-of-environment-and-development-in-mediterranean/>

<sup>22</sup> ECO-UNION. *Blue Tourism. The Transition Towards Sustainable Coastal and Maritime Tourism in World Marine Regions*, 2019.

<sup>23</sup> UNWTO, *International Tourism and Covid-19*, updated October 2020. [www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism](http://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism)

<sup>24</sup> *High Level Panel for a Sustainable Ocean Economy* [www.oceanpanel.org/](http://www.oceanpanel.org/)