

# The effect of crisis in Eastern Mediterranean region on international tourist arrivals

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## **Abstract**

The fragility of tourism sector could be observed in many parts of the world. Instability of natural environment can be determining factor in turning away potential tourists from tourism destinations – earthquakes, volcano eruptions or tsunamis, as well as visible climate changes certainly decrease tourist arrivals to the regions where they have been reported. However, economic and political instability seems to have larger effects on the sector. Eastern Mediterranean region's political instability after 2005 affected negatively its countries in numerous ways, including tourism. Purpose of this paper is to measure the effect of crisis in Eastern Mediterranean region on international tourist arrivals to all Mediterranean countries. Research period 2005–2013 covers outbreaks of several huge crises in the region. The leading hypothesis is that international tourist flow has generally switched from Eastern to Western Mediterranean countries within the research period, meaning that the largest “benefiters” of the political crisis in the Eastern Mediterranean countries are Western European Mediterranean countries, including the ones which were not involved into Arab spring happenings. In order to test hypothesis the desk research is done by analyzing various reports on tourism in Mediterranean region prepared by United Nations World Tourism Organization (UNWTO).

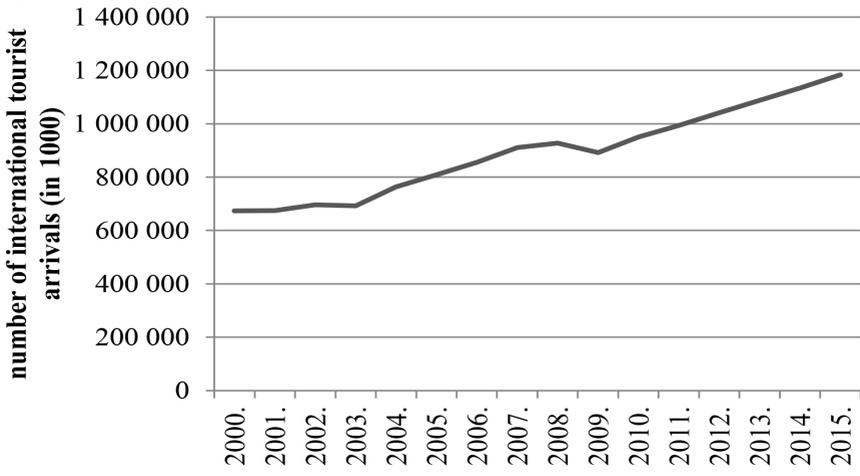
**Keywords:** *Arab spring, switch of tourist flows, Western Mediterranean.*

## **Introduction**

Despite occasional shocks, international tourism has shown virtually uninterrupted growth worldwide since the middle of the 20<sup>th</sup> century. The UNWTO reported 25 million of international tourist in 1950, while the year 2013 finishes with 1.087 million of people travelling internationally for tourism

purposes (UNWTO, 2015). Moreover, the analysis of various UNWTO reports show that even more rapid increase of international tourist arrivals could be observed in the 21<sup>st</sup> century, when between 2000 and 2015 – in only 15 years, number of international tourist arrivals has almost doubled itself (Fig. 1). During mentioned period international world tourism sector experienced stagnation at the very beginning of the century and a slight decrease in 2009 with immediate recover in 2010. The first was a consequence of the 7/11 terrorist attack and the second of Global Financial Crisis 2007–2008.

**Fig. 1:** Increase of worldwide international tourist arrivals (2000-2015)



*Source:* own elaboration based on UNWTO (2005, 2007, 2009, 2011, 2013, 2015 and 2016)

The importance of tourism for many world economies is undoubtable. Tourism in many countries represents a key driver of socio-economic progress through export revenues, the creation of jobs and enterprises, and infrastructure development (UNWTO, 2013). Over the past six decades, tourism has experienced continued expansion and diversification becoming one of the largest and fastest growing economic sectors in the world. The UNWTO report (UNWTO, 2015) suggests that in export earnings by category, the tourism with its US\$ 1.522 trillion is on the third place, after fuels and chemicals and before food and automotive products. Moreover,

UNWTO experts argue that in 2014 tourism has covered 9% of the World's GDP by direct, indirect and induced impact, 1 in 11 jobs in the World and 6% of the World's exports (UNWTO, 2015).

## **Delimitations in the research**

Despite scholars' continuous criticism on UNWTO definition of (international) tourist, where tourist is only the person with an overnight stay in the destination, or criticism on methods of measuring tourist arrivals where the data are not standardized among the countries, in this paper the UNWTO definitions of tourists and the measuring methods are followed since there has been no better comparable data between the countries existing yet. However, the UNWTO world regionalization is not followed here, since its regionalization split Mediterranean region into three regions: Europe, Middle East and Africa. Despite Mediterranean region is known as the area with largest number of tourist arrivals, UNWTO is not issuing annual reports focused only on this region.

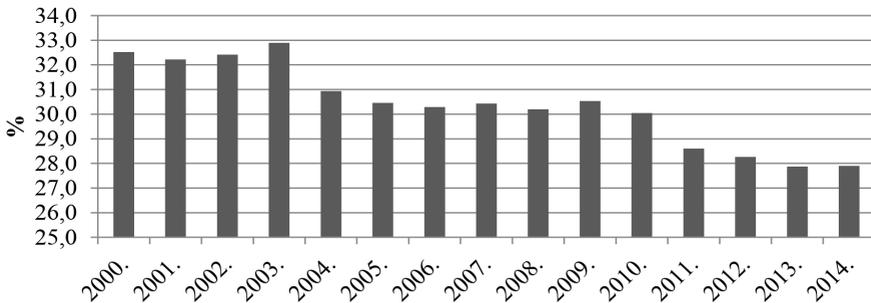
This research is covering all countries with access to Mediterranean Sea, except countries which have access only to the Black Sea. Therefore, 11 European (Albania, Bosnia and Herzegovina, Croatia, France, Greece, Italy, Malta, Monaco, Montenegro, Slovenia, Spain), 6 Asian (Cyprus, Israel, Lebanon, Palestine, Syria, Turkey), and 5 African countries (Algeria, Egypt, Libya, Morocco, Tunisia) are included in the research. Another delimitation is that research focuses only on international tourists and it is excluding the domestic ones. Third delimitation considers area taken in research. Because of incomparable data, international arrivals taken in the research cover arrivals to entire observed countries, not only their Mediterranean range. Therefore in the research are incorporated tourist arrivals to Paris and Cairo for example, which are definitely not Mediterranean destinations. Fully aware of this problem, author finds that results could be suitable to accept or reject the set hypothesis.

## **Tourism in Mediterranean Region**

Mediterranean belongs to developed World's tourism regions, which are characterized by slow increase in number of tourists, in comparison with countries which tourism is still developing. However, first 15 years of 21<sup>st</sup>

century showed increase in number of tourists for Mediterranean region for over almost 100 million – from 219 199 arrivals in 2000 to 316 054 in 2014. From the other side, between 2000–2014 Mediterranean Region experienced decline in shares of world international tourist arrivals from 32,5% to 27,9%, presenting a decline trend from almost one third toward one fourth of World’s international tourist arrivals (Fig. 2). No matter of decline, Mediterranean Region still presents the highest concentration of international tourist arrivals among all of the World’s regions.

**Fig. 2:** Mediterranean Region’s international tourist arrivals’ shares in worldwide international arrivals



Source: own elaboration based on UNWTO (2005, 2007, 2009, 2011, 2013 and 2015)

Economic and political crisis are not alone within Mediterranean tourism vulnerabilities. Natural conditions are changing a lot recently and various prognosis shows that temperatures will continue to increase in the region with a consequence of droughts which will become more frequent, water stress will grow, fire risks will increase and heatwaves will become more frequent. Also, biodiversity will be affected by the changes, more vector-borne diseases will appear and jellyfish outbreaks or algae blooms will become more frequent in entire basin. Human activity as well as a tourist pressure on the area is obviously helping the change of the natural conditions in the Mediterranean, but the largest recent vulnerability of Mediterranean Region’s tourism sector presents human activity which influences economy and political systems of the countries in the region. In their research, Sonmez et al. (1999) found that terrorism has higher impact on tourism than natural disaster. Huge majority of tourists seek secure areas, but perception of

secure or dangerous area is very subjective. Definitely, areas with not stable government(s), frequent demonstrations, violence, conflicts, visible military troop or war areas are treated as “dangerous” and will be avoided by ordinary international tourists. Mediterranean Region in the 21<sup>st</sup> century, especially its eastern part, became this dangerous zone. In order to find out what was the reaction of potential international tourists on outbreak of various crises, the analysis in this article has been done. Research covers the period between 2005 and 2014, since this period covers outbreaks of several huge crises in the Mediterranean Basin (Fig. 3). The year 2014 is taken as a final one, since it is the year for which official data are available.

**Fig. 3:** Outbreak of crises in the Mediterranean Region since 2005

|  |
|--|
| <b>Global financial crisis</b> (2007–2008)   |
| <b>Greek government-debt crisis („Greek depression”)</b> (since 2009)  |
| <b>Arab Spring</b> (since 2010):<br><ul style="list-style-type: none"> <li>– government overthrown multiple times (Egypt 2011–)</li> <li>– government overthrown (Tunisia 2010–2014)</li> <li>– civil war (Lybia 2011-, Syria 2011–)</li> <li>– protests and governmental changes (Morocco 2011–2012)</li> <li>– major protests (Algeria 2010–2012, Lebanon 2011)</li> </ul> |
| <b>Cypriot financial crisis</b> (2012–2013)  |
| <b>Islamic State of Iraq and Syria (ISIS) terrorist attacks</b> (since 2013)   |
| <b>Migrant Crisis</b> (since 2014)   |
| <b>continuation of Israel – Palestina conflict</b><br><ul style="list-style-type: none"> <li>– Israel – Gaza conflict (2006)</li> <li>– Fatah – Hamas conflict (2007)</li> <li>– Israeli Operation Pillar of Defense (2012)</li> </ul>   |

*Source:* own elaboration

## Analysis of international tourist flow in the Mediterranean between 2005 and 2014

Between 2005 and 2014 the Mediterranean region experienced growth of 28.3%, nearly 70 million of “new” international tourists visited Mediterranean destinations. During the same period, the number of worldwide international tourist arrivals increased for 40%, representing 324 million of “new” tourists.

**Tab. 1:** International Tourist Arrivals by Mediterranean countries between 2005 and 2014 (in thousands), and their yearly change (in%)

| continent                    | country                      | 2005    | 2006    | 2005-2006<br>change<br>(in%) | 2007    | 2006-2007<br>change<br>(in%) | 2008    | 2007-2008<br>change<br>(in%) | 2009    | 2008-2009<br>change<br>(in%) | 2010    | 2009-2010<br>change<br>(in%) | 2011    | 2010-2011<br>change<br>(in%) | 2012      | 2011-2012<br>change<br>(in%) | 2013      | 2012-2013<br>change<br>(in%) | 2014      | 2013-2014<br>change<br>(in%) | 2015  | 2014-2015<br>change<br>(in%) |
|------------------------------|------------------------------|---------|---------|------------------------------|---------|------------------------------|---------|------------------------------|---------|------------------------------|---------|------------------------------|---------|------------------------------|-----------|------------------------------|-----------|------------------------------|-----------|------------------------------|-------|------------------------------|
| Africa                       | Algeria                      | 1 443   | 1 638   | 13,5                         | 1 743   | 6,4                          | 1 772   | 1,7                          | 1 912   | 7,9                          | 2 070   | 8,3                          | 2 395   | 15,7                         | 2 634     | 10,0                         | 2 733     | 3,8                          | 2 301     | -15,8                        | 59,5  |                              |
|                              | Egypt                        | 8 244   | 8 646   | 4,9                          | 10 610  | 22,7                         | 12 296  | 15,9                         | 11 914  | -3,1                         | 14 051  | 17,9                         | 9 497   | -32,4                        | 11 196    | 17,9                         | 9 174     | -18,1                        | 9 628     | 4,9                          | 16,8  |                              |
|                              | Libya                        | 81      | 42      | -48,1                        | 38      | -9,5                         | 34      | -10,5                        |         |                              |         |                              |         |                              |           |                              |           |                              |           |                              |       |                              |
|                              | Morocco                      | 5 843   | 6 558   | 12,2                         | 7 408   | 13,0                         | 7 879   | 6,4                          | 8 341   | 5,9                          | 9 288   | 11,4                         | 9 342   | 0,6                          | 9 375     | 0,4                          | 10 046    | 7,2                          | 10 282    | 2,3                          | 76,0  |                              |
|                              | Tunisia                      | 6 378   | 6 550   | 2,7                          | 6 762   | 3,2                          | 7 049   | 4,2                          | 6 901   | -2,1                         | 6 903   | 0,0                          | 4 782   | -30,7                        | 5 950     | 24,4                         | 6 269     | 5,4                          | 6 069     | -3,2                         | -4,8  |                              |
| Asia                         | Cyprus                       | 2 657   | 2 629   | -1,1                         | 2 416   | -8,1                         | 2 404   | -0,5                         | 2 141   | -10,9                        | 2 173   | 1,5                          | 2 392   | 10,1                         | 2 465     | 3,1                          | 2 405     | -2,4                         | 2 441     | 1,5                          | -8,1  |                              |
|                              | Israel                       | 1 903   | 1 825   | -4,1                         | 2 068   | 13,3                         | 2 572   | 24,4                         | 2 321   | -9,8                         | 2 803   | 20,8                         | 2 820   | 0,6                          | 2 886     | 2,3                          | 2 962     | 2,6                          | 2 927     | -1,2                         | 58,8  |                              |
|                              | Lebanon                      | 1 140   | 1 063   | -6,8                         | 1 017   | -4,3                         | 1 333   | 31,1                         | 1 844   | 38,3                         | 2 168   | 17,6                         | 1 655   | -23,7                        | 1 366     | -17,5                        | 1 274     | -6,7                         | 1 355     | 6,4                          | 18,9  |                              |
|                              | Palestine                    |         |         |                              | 264     |                              | 387     | 46,6                         | 396     | 2,3                          | 522     | 31,8                         | 446     | -14,6                        | 490       | 9,9                          | 545       | 11,2                         | 556       | 2,0                          |       |                              |
|                              | Syria                        | 3 368   | 4 231   | 25,6                         | 4 158   | -1,7                         | 5 430   | 30,6                         | 6 092   | 12,2                         | 8 546   | 40,3                         | 5 070   | -40,7                        |           |                              |           |                              |           |                              |       |                              |
| Europe                       | Turkey                       | 20 273  | 18 916  | -6,7                         | 22 248  | 17,6                         | 24 994  | 12,3                         | 25 506  | 2,0                          | 31 364  | 23,0                         | 29 343  | -6,4                         | 35 698    | 21,7                         | 37 795    | 5,9                          | 39 811    | 5,3                          | 96,4  |                              |
|                              | Albania                      |         |         |                              | 1 062   |                              | 1 247   | 17,4                         | 1 792   | 43,7                         | 2 191   | 22,3                         | 2 865   | 30,8                         | 3 156     | 10,2                         | 2 857     | -9,5                         | 3 341     | 16,9                         |       |                              |
|                              | Bosnia and Herzegovina       | 217     | 256     | 18,0                         | 306     | 19,5                         | 322     | 5,2                          | 311     | -3,4                         | 365     | 17,4                         | 392     | 7,4                          | 439       | 12,0                         | 529       | 20,5                         | 536       | 1,3                          | 147,0 |                              |
|                              | Croatia                      | 8 467   | 8 659   | 2,3                          | 9 307   | 7,5                          | 9 415   | 1,2                          | 8 694   | -7,7                         | 9 111   | 4,8                          | 9 927   | 9,0                          | 10 369    | 4,5                          | 10 948    | 5,6                          | 11 623    | 6,2                          | 37,3  |                              |
|                              | France                       | 75 908  | 78 853  | 3,9                          | 81 940  | 3,9                          | 79 300  | -3,2                         | 76 764  | -3,2                         | 77 648  | 1,2                          | 79 500  | 2,4                          | 81 980    | 3,1                          | 83 633    | 2,0                          | 83 700    | 0,1                          | 10,3  |                              |
|                              | Greece                       | 14 765  | 16 039  | 8,6                          | 16 165  | 0,8                          | 15 939  | -1,4                         | 14 915  | -6,4                         | 15 007  | 0,6                          | 16 427  | 9,5                          | 15 518    | -5,5                         | 17 920    | 15,5                         | 22 033    | 23,0                         | 49,2  |                              |
|                              | Italy                        | 36 513  | 41 058  | 12,4                         | 43 654  | 6,3                          | 42 734  | -2,1                         | 43 239  | 1,2                          | 43 626  | 0,9                          | 46 119  | 5,7                          | 46 360    | 0,5                          | 47 704    | 2,9                          | 48 676    | 2,0                          | 33,3  |                              |
|                              | Malta                        | 1 151   | 1 124   | -2,3                         | 1 244   | 10,7                         | 1 291   | 3,8                          | 1 182   | -8,4                         | 1 339   | 13,3                         | 1 412   | 5,5                          | 1 443     | 2,2                          | 1 582     | 9,6                          | 1 690     | 6,8                          | 46,8  |                              |
|                              | Monaco                       | 286     | 313     | 9,4                          | 328     | 4,8                          | 324     | -1,2                         | 265     | -18,2                        | 279     | 5,3                          | 295     | 5,7                          | 292       | -1,0                         | 328       | 12,3                         | 329       | 0,3                          | 15,0  |                              |
|                              | Montenegro                   | 272     | 378     | 39,0                         | 984     | 160,3                        | 1 031   | 4,8                          | 1 044   | 1,3                          | 1 088   | 4,2                          | 1 201   | 10,4                         | 1 264     | 5,2                          | 1 324     | 4,7                          | 1 350     | 2,0                          | 396,3 |                              |
| Mediterranean Region total   | Slovenia                     | 1 555   | 1 617   | 4,0                          | 1 751   | 8,3                          | 1 958   | 11,8                         | 1 824   | -6,8                         | 1 869   | 2,5                          | 2 037   | 9,0                          | 2 156     | 5,8                          | 2 259     | 4,8                          | 2 411     | 6,7                          | 55,0  |                              |
|                              | Spain                        | 55 914  | 58 004  | 3,7                          | 58 666  | 1,1                          | 57 192  | -2,5                         | 52 178  | -8,8                         | 52 677  | 1,0                          | 56 694  | 7,6                          | 57 464    | 1,4                          | 60 676    | 5,6                          | 64 995    | 7,1                          | 16,2  |                              |
| World total                  | shate of Med Region in total | 246 378 | 258 399 | 4,9                          | 274 139 | 6,1                          | 276 903 | 1,0                          | 269 576 | -2,6                         | 285 088 | 5,8                          | 284 611 | -0,2                         | 292 501   | 2,8                          | 302 963   | 3,6                          | 316 054   | 4,3                          | 28,3  |                              |
|                              | World total                  | 809 000 | 853 000 | 5,4                          | 901 000 | 5,6                          | 917 000 | 1,8                          | 883 000 | -3,7                         | 949 000 | 7,5                          | 995 000 | 4,8                          | 1 035 000 | 4,0                          | 1 087 000 | 5,0                          | 1 133 000 | 4,2                          | 40,0  |                              |
| shate of Med Region in total | World                        | 30,5    | 30,3    | -0,5                         | 30,4    | 0,4                          | 30,2    | -0,8                         | 30,5    | 1,1                          | 30,0    | -1,6                         | 28,6    | -4,8                         | 28,3      | -1,2                         | 28        | -1,4                         | 27,9      | 0,1                          | -8,4  |                              |
|                              | World                        |         |         |                              |         |                              |         |                              |         |                              |         |                              |         |                              |           |                              |           |                              |           |                              |       |                              |

Source: own elaboration based on Gosar (2007), TourMIS (2016), UNWTO (2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015) and World Bank (2016)

Mediterranean growth differs among the Mediterranean countries, including that some of them recorded less international tourists in 2014 than in 2005 – Cyprus –8.1%, Tunisia – 4.8%. Since there is no data for last years because of war situation, Libya and Syria have also recorded lower number of international tourist arrivals than in 2005. Absolute winners of the research area and period are two countries with access to Adriatic Sea: Montenegro and Bosnia and Herzegovina, with international tourist arrivals' increase of 396.3 and 147.0%. However, both belong to the group of countries with the smallest absolute number of tourists in the Mediterranean region – 0.5 and 1.3 million of arrivals in 2014. Within the countries which were receiving over 5 million tourists yearly in 2005, the highest increases over the decade were recorded for Turkey 96.4%, Morocco 76.0% and Greece 49.2%. Despite the good overall results, the happenings in the region and especially in its eastern part influenced a lot in dynamics of growth during last decade. Before achieving good positive results, most of the countries experienced negative changes during the certain period within the decade (Tab. 1).

During the observed period, there were only two years when Mediterranean region underperformed in matter of international tourist numbers, in 2009 and in 2011. Overall decrease of international tourists in the Mediterranean region for 2.6% in 2009 is the effect of Global financial crisis (2007–2008), while decrease of 0.2% in 2011 is the effect of Arab spring which started in 2010. While Global financial crisis affected mostly European Mediterranean countries – Monaco –18.2%, Spain –8.8%, Malta –8.4%, Croatia –7.7%, Slovenia –6.8% and Greece –6.4%, Arab spring affected mostly African and Asian Mediterranean countries such as are Syria –40.7%, Egypt –32.4%, Tunisia –30.7% and Lebanon –23.7%. Libya should be added on the latter list, but there is a lack of data present for it due to ongoing conflicts.

The first effects of Global financial crisis on international tourist arrivals in the Mediterranean region can be noticed in 2008, since after two subsequent years of higher increases on yearly basis, 4.9% for 2006 in comparison with 2005, and 6.1% for 2007 in comparison with 2006, the increase for 2008 in comparison with 2007 was only 1%. Within those three subsequent years, in Afro-Mediterranean Morocco has recorded constant high increases: 12.2% for period between 2005-2006, 13.0% for 2006–2007, and 6.4% for 2007–2008.

Morocco's stellar performance among other factors is attributable to dedicated investment in tourism infrastructure and to the liberalization of air transport and the subsequent entry of low-cost airlines in 2006 (UNWTO, 2007), as well as to strong government support coupled with easy access and attractive prices compared to "euro" destinations on the northern shores of the Mediterranean in 2008 (UNWTO, 2009). Other Afro-Mediterranean countries except Libya – Algeria, Egypt and Tunisia posted good results as well, while Tunisian slightly lower than average results from the previous years are due to market volatility and problems with air transport (UNWTO, 2007). Libya is the only Afro-Mediterranean destination during the pre-Global financial crisis research period which recorded continuous decrease, despite the conflicts in Libya which continued as a civil war started in 2011. Because of the Israel-Lebanon crisis, Israel-Gaza conflict (2006) and Fatah-Hamas conflict (2007), the performance of Asian Mediterranean countries or Middle East between 2005 and 2007 is turbulent. However, 2008 brought to these countries high growth rates in comparison with arrivals in 2007: Palestine 46.6%, Lebanon 31.1%, Syria 30.6%, and Israel 24.4%. Syria has recorded also high growth rates in 2006 – 25.6%, in large part due to the high increased in arrivals from Lebanon (UNWTO, 2007). The international tourist arrivals to Euro-Mediterranean countries in 2006 and 2007 were more stable than to Afro-Mediterranean or Asian Mediterranean countries. High growths are observed in Balkan states, especially in Montenegro where the growth rate for 2005-2006 was 39.0%, and for 2006-2007 even 160.3%. Montenegro is followed by its neighbor Bosnia and Herzegovina – 18.0% for 2005-2006, and 19.5% for 2006-2007. Such a high growths are attributed as a result to increased promotion in key markets (UNWTO, 2008). The effect of the Global financial crisis that emerged in mid-2008 could be observed also in Euro-Mediterranean countries already in 2008, when the rates of national growths decreased and the most important destinations, such as are France, Spain and Italy has recorded the decrease in international tourist arrivals in comparison to 2007: 3.2%, 2.5 and 2.1%, respectively.

As mentioned above, the largest overall decrease in international tourist arrivals to Mediterranean region during the researched period happened in 2009 due to Global financial crisis. Despite the crisis, some countries recorded very high growth rates for 2009 in comparison to arrivals in 2008:

Albania 43.7%, Lebanon 38.3%, Syria 12.2%, Algeria 7.9%, and Morocco 5.9%. Out of all the UNWTO regions in the world, Europe's tourism sector in general, the world's largest and most mature, has been the hardest hit by the recession (UNWTO, 2010). The infamous recorder of decrease 2008–2009 in Euro-Mediterranean countries is Monaco with –18.2%. The tourist “giant” Spain recorded decreased international tourist arrivals between 2008 and 2009 for 8.8%. In the largest underperformance in Euro-Mediterranean countries, Spain is followed by Malta –8.4, Croatia –7.7%, Slovenia –6.8%, Greece –6.4%.

Due to huge decreases in 2009, 2010 shows only growths for all of 22 observed Mediterranean countries. In 2010 the largest growth rates are observed in Asian Mediterranean countries, where except Cyprus with increase of only 1.5%, all other countries recorded two digits growth rates: Syria 40.3%, Palestine 31.8%, Turkey 23.0%, Israel 20.8% and Lebanon 17.6%. In Afro-Mediterranean countries Tunisia recorded stagnation, while other countries recorded high growth rates as well: Egypt 17.9%, Morocco 11.4% and Algeria 8.3%. Well established Euro-Mediterranean destinations such as Spain, France, Italy and Greece reported weak growth in 2010 with comparison to 2009 – all around 1%.

While Euro-Mediterranean recovers in the following year, 2011<sup>th</sup> brought to entire Mediterranean region the second overall decrease in the researched period. In Afro-Mediterranean countries the growth rate for Egypt was –32.4%, and for Tunisia –30.7%, due to governments overthrown in Tunisia in 2010 and Egypt in 2011. The beginning of Arab spring in 2010 affected international tourist arrivals to majority of Afro-Mediterranean and Asian Mediterranean countries already in 2011. The Middle East and North Africa were the only World's UNWTO sub-regions to record a decline in arrivals in this year (UNWTO, 2012). The UNWTO's predictions for Middle East region, as the fastest growing one in the world over the past decade, is a lost an estimated 5 million international tourist arrivals in 2011 (UNWTO, 2012). Besides Egypt and Tunisia, significant drops in tourist arrivals are recorded in Syria –40.7%, Lebanon –23.7, Palestine –14.6%, and Turkey –6.4%. From the other side, the robust growth of international tourist arrivals in Euro-Mediterranean countries was mostly driven by the larger destinations: Greece 9.5%, Croatia 9%, Spain 7.6%, and Italy 5.7%.

Due to continued tensions in some of Middle East destinations and civil war in Syria, majority of countries in this part of Mediterranean experienced additional drops or significant lower growth in arrivals as well in 2012. Because of huge protests in Lebanon in 2011 and a war in neighboring Syria, Lebanon suffered decrease of 17.5%. The only destination which experienced huge growth within Asian Mediterranean countries was Turkey with 21.7%. A better political situation in Afro-Mediterranean countries resulted in a strong rebound from the decline in 2011, as Tunisia with growth rate of 24.4% started to recover from the negative demand trends following the Arab spring transition. As well Egypt has experienced a sustained rebound of 17.9% growth in international tourist arrivals after the decline of 2011. Due to protests and governmental changes in Morocco in 2011 and 2012, the growth of Morocco in 2012 is the smallest performance of this country in the researched period. Destinations in Euro-Mediterranean consolidated their excellent performance of 2011 and returned in 2012 to their normal modest growth rates (UNWTO, 2013). However, because of the peak of Greek government-debt crisis in 2012, Greece is the only Euro-Mediterranean destination with significant decrease – even –5.5%.

Lebanon with decrease of international tourist arrivals of 6.7% continued to suffer from the conflict in neighboring Syria as well in 2013. The effect of new local financial crisis – Cypriot financial crisis which had place in Cyprus 2012-2013, the number of international tourists in Cyprus drop for –2.4% in 2013. The Cypriot crisis remained local and therefore neighboring Turkey recorded growth of 5.9% in 2013, which is important because Turkey with almost 38 million international tourist arrivals was the largest Asian Mediterranean destination in 2013 – with 5 times larger number of arrivals than all other Asian Mediterranean countries together. Huge growth rate in Morocco of 7.2% made it the first African destination to have surpassed the mark of 10 million international arrivals (UNWTO, 2014). Tunisia recovered further with annual growth rate of 5.4%, while Egypt finished the year with significant drop of international tourist arrivals. It is interesting that firstly posted to UNWTO headquarters double-digit growth in the first half of the year, but saw a significant drop in arrivals in the second half due to renewed political tension in the country which led to an overall decrease of 18.1%

(UNWTO, 2014). Except the Albania, all Euro-Mediterranean countries registered growth for 2013. Its largest tourist destination Spain recorded a sound 5.6% increase in arrivals to receive nearly 61 million tourists in total. Other major destinations such as Greece with 15.5% and Croatia with 5.6% also saw robust growth in 2013.

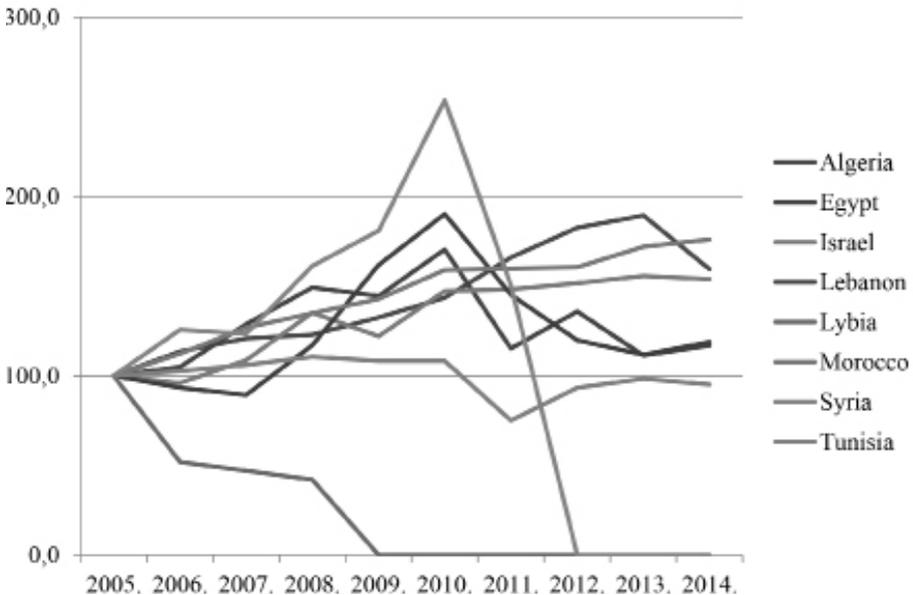
Since 2013, despite of some signs of recovery in Asian Mediterranean and Afro Mediterranean countries, the terrorist attacks with responsibility took by Islamic State of Iraq and Syria (ISIS) members become another problem for growth of tourism in this part of Mediterranean. In 2014, Lebanon started recovering with growth rate of 6.4%, but again the subregion's overall growth is due to 5.3% growth of international tourist arrivals to Turkey. Among Afro-Mediterranean countries, Algeria with -15.8% and Tunisia with -3.2% recorded decreases. Morocco remained to have more than 10 million of international tourist arrivals with modest growth of 2.3%, while Egypt, after previous year's decrease of -18.1%, finished with 4.9% increase in 2014. However, again first part of the year for Egypt was totally different than the other one: first was decrease, while the other was increase (UNWTO, 2015). Just like in 2007, 2010 and 2011, the 2014 for Euro-Mediterranean represented a year without a country with decreases. Arrivals to Greece grew by an exceptional 23.0% while Spain, the subregion's second top destination posted 7.1% growth. Other established Mediterranean destinations such as Malta and Croatia also reported solid growth. Europe's third most visited destination Italy posted 2.0%, while emerging Euro-Mediterranean destination Albania reported double-digit increase of 16.9% in 2014.

### **Mediterranean tourism *winner*s and *loser*s in the last decade**

As presented analysis by countries showed that majority of the Mediterranean countries experienced both increases and decreases during the last decade, it is very hard to clearly point *the winners* and *the losers* of the Mediterranean tourism over the last decade. However, it is obvious that country such as Syria where civil war started in 2011 and immediately affected international tourist arrivals, can be pinpointed as a *loser* of the researched period. In this category Syria is followed by Lybia, where the conflicts which started in 2011 were still on duty in 2014. The data on

international tourist arrivals for mentioned two countries are missing for the last year of the research, but it is logical to pinpoint those countries as a *losers* of the decade in Mediterranean region when international tourism matters. Those two countries are followed by Cyprus and Tunisia, which are the only Mediterranean countries with recorded decrease over the period 2005-2014,  $-8.1\%$  and  $-4.8\%$ , respectively. From the other side, proclaimed as a Mediterranean regional tourism winners over the last decade could be Montenegro, Bosnia and Herzegovina and Turkey with increase of  $393.3\%$ ,  $147.0\%$  and  $96.4\%$  over the period, respectively. Among larger destinations which recorded more than 5 million of international tourist arrivals in 2005, Tunisia again act as a *loser* and the only larger destination which recorded decrease over the decade. The pinpointed larger destinations' *winner*s are Turkey with  $96.4\%$ , Morocco with  $76.0\%$  and Greece with  $49.2\%$  increase in the research period.

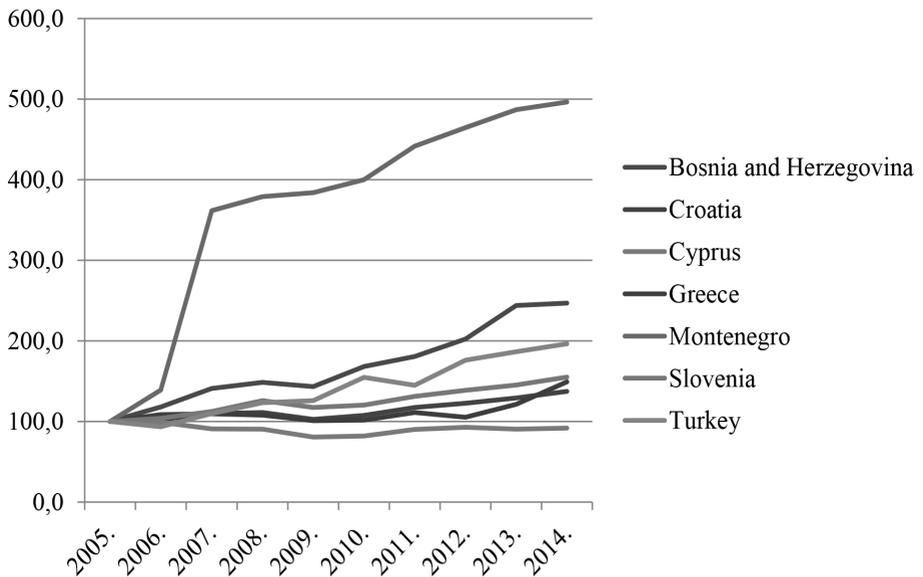
**Fig. 4:** International tourist arrivals to the countries involved in Arab spring and Israel between 2005 and 2014 (indexes; 100 = number of international tourists in 2005)



Source: own elaboration based on UNWTO (2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014 and 2015)

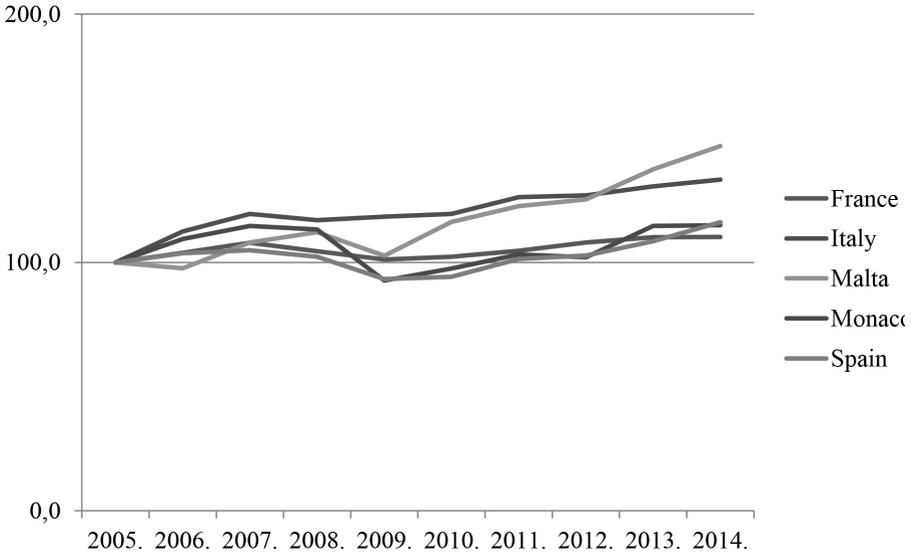
In order to track subregional changes, the Mediterranean region is divided into three: (1) countries involved in Arab spring and Israel, (2) other Eastern Mediterranean countries, and (3) other Western Mediterranean countries. This division shows huge differences. While countries involved in Arab spring and Israel shows huge turbulences over the whole period (Fig. 4), other two regions show dynamics as well, their overall result is more constant increase (Fig. 5 and Fig. 6). However, Eastern Mediterranean countries not involved in Arab spring show higher increases than Western Mediterranean countries. From this analysis appears that the *winner* of the Mediterranean tourism is the region consists of countries in the Eastern Mediterranean which were not involved in Arab spring.

**Fig. 5:** International tourist arrivals to the Eastern Mediterranean countries not involved in Arab spring between 2005 and 2014 (indexes; 100 = number of international tourists in 2005)



Source: own elaboration based on UNWTO (2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014 and 2015)

**Fig. 6:** International tourist arrivals to the Western Mediterranean countries between 2005 and 2014 (indexes; 100 = number of international tourists in 2005)



Source: own elaboration based on UNWTO (2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014 and 2015)

## Summary

Purpose of this paper was to measure the effect of crisis in Eastern Mediterranean region on international tourist arrivals to all Mediterranean countries between 2005 and 2014. Several huge crises hit the region during the research period and the leading hypothesis was that international tourist flow has generally switched from Eastern to Western Mediterranean countries, including Eastern Mediterranean countries which were not included in Arab spring. The desk research based on official UNWTO reports accept this hypothesis and pinpointed Eastern Mediterranean countries not involved in Arab spring as the subregion with largest benefits in tourism flow during the last decade. It also pinpointed among larger destinations Tunisia as a country which lost the most, while Turkey, Morocco and Greece gain the most over the researched period.

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