The Arab revolutions have badly hit the tourism sector of Southern and Eastern Mediterranean Countries (SEMCs)\(^1\), which have all met with declining arrivals – over 20% in losses on average for the entire sub-region.\(^2\) These unprecedented protest movements, combined with other, highly worrisome regional episodes (the terrorist attack in Marrakesh, war in Libya, the Syrian crisis) have alarmed European tourists, many of whom have retreated to the north shore of the Mediterranean for their holidays. The persistence of trouble in the Middle East and the uncertainties regarding the capacity of the new Egyptian, Tunisian and Libyan governments to ensure a democratic transition may cause tourists to continue to avoid South Mediterranean destinations. In countries where tourism accounts on average for 10% of both the GDP and employment, this crisis seems highly dangerous and makes the recovery of tourist levels an economic priority of the first order.

Yet the recovery of tourism activity is not an end in itself. The revolutions have revealed structural shortcomings in the tourism sector, weakened by years of inadequate governance and incapable of offering renewed development opportunities in the spheres of employment and investment. Although growth in tourist arrivals had reached a high in recent years, it is the tourism model itself that was called into question by the revolution. The predominance of mass seaside tourism, dependence on the European market and territorial tourism development imbalances constitute the weak points of poorly balanced South Mediterranean tourism. At a time when the majority of SEMCs are undertaking processes of democratisation, said weaknesses represent the key sectoral challenges these countries are facing.

The Weight of Tourism in SEMC Economies

With nearly 300 million international arrivals in 2010, i.e., approximately a third of the total international tourist flow worldwide, the Mediterranean is the world’s premiere tourist region. Due to the presence of the tourism giants of the north shore (France, Spain and Italy), the SEMCs account for only a small percentage of the total (50 million). On the other hand, their position in regional tourism is significant on the level of growth. From 2005 to 2010, these countries experienced an average annual growth in number of arrivals of 8%. In comparison, European Mediterranean countries not including Turkey registered an average growth rate of 1% for the same period. The South has emerged in the 2000s as the main area of tourism growth in the Mediterranean Region (see Table 8).

The level of tourism development in the SEMCs remains highly uneven. On the South Mediterranean there are both major tourist countries for which tourism has long been a strategic sector (Tunisia, Mo-

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\(^1\) Where SEMC stands for the ensemble of non-European countries along the Mediterranean shoreline, not including Turkey, i.e. Morocco, Algeria, Tunisia, Libya, Egypt, Jordan, Israel, Palestinian Territories, Lebanon and Syria.

\(^2\) Source: Data from UNWTO World Tourism Barometer, Volume 10, January 2012. Calculations by the author.
rocco, Egypt and Jordan) and countries closed to tourism (Algeria and Libya). Tourist affluence to countries of the Middle East (Syria, Lebanon, Israel and Palestinian Territories) varies in alternating cycles according to the political crises striking the region, although the general trend is towards growth in the ensemble of these countries. In the 2005-2010 period, it was Morocco, Egypt and Jordan that took the lead in the SEMCs with an average annual growth rate (AAGR) of over 9% in arrivals and over 10% in international tourism revenues. Tunisia, the pioneer of tourism development on the South Mediterranean, has become the country with the poorest performance in the region.

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South Mediterranean tourism is characterised by strong dependence on European flows, which on average account for 60% of international arrivals. These flows nurture an economy that represents an important source of employment and investment, whether tourism is the object of economic strategies or not. On the eve of the Arab Spring, the sector accounted for 3.8 million direct jobs in the SEMCs, i.e. 7% of total jobs, and 8.5 million indirect jobs, i.e. 15% of total jobs. By entailing a drastic fall in tourism activity in the region, the revolutions have endangered one of the most dynamic and strategic economies on the South shore.

The Impact of the Arab Revolutions on Tourism

Considering the cross-cutting nature of economic activity in the tourism sector and its spillover effects on other sectors, the impact of the Arab Spring on South Mediterranean tourism is difficult to evaluate with precision. Nevertheless, the first quantification of declining arrivals and tourism revenues in 2011 suggests the magnitude of losses related to the revolutions. The two revolutionary countries, Tunisia and Egypt, registered a fall in international arrivals of 31% and 33% over 2010, and a drop in international tourism revenues of 51% and 26%, respectively. The Middle East felt the consequences of the Egyptian revolution and the Syrian crisis, with a drop in international arrivals of 41% in Syria, 24% in Lebanon and 16% in Jordan. Israel and Morocco are the only SEMCs having continued to experience growth of international arrivals, though much slower (0.6% and 1.6%, respectively).

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3 Source: TSA Research, World Travel and Tourism Company (WTTC).
Apart from the shortage of financial resources they have caused, these losses have also entailed the destruction of thousands of jobs. In the short term, one of the effects of the Arab Spring has been to aggravate the socio-economic situation that motivated it. But the profound impact of these events will be measured by the recovery of tourism in the countries having undergone revolution. In this regard, it seems that resumption of tourism activity in the South will depend more on attitudes on the North shore than measures taken on the South shore, despite the fact that countries having experienced uprisings have not only taken the necessary actions, such as stepping up security in tourist areas and organising public relations campaigns aiming to reassure European tourists, but above all, no hostile acts were registered against tourists during the high season following the revolutions. The hesitation of both tour operators and individual tourists to return to the South can most likely be ascribed to the fact that the Arab revolutions, rather than having aroused the empathy and goodwill of European countries, were quickly relegated to the debate on the Islamist threat that supposedly hangs over the Arab world. The global economic crisis and the victory of Islamist parties at Tunisian, Moroccan and Egyptian elections have fuelled a certain distrust of the South, strongly fostered by the European media and by certain local events, such as the kidnapping of tourists in the Sinai in the winter of 2012. The impact of the revolutions on the collective imagination makes the recovery of confidence one of the greatest challenges of the transition.

The Role of the Revolutions in Revealing Shortcomings in the Tourism Model

Well before the revolutions, numerous sectoral analyses had concluded that South Mediterranean tourism had structural defects. Despite the heterogeneity of situations and levels of tourism development in the SEMCs, all of them have a comparable shortcoming: the low diversity of the tourism offer. This shortcoming, which concerns the nature of the supply (types and ranges of products) as well as its geographical distribution, is associated not only with the form of tourism that has been fostered in these countries, but also the way in which their tourist territories have been structured.

Considering the cross-cutting nature of economic activity in the tourism sector and its spillover effects on other sectors, the impact of the Arab Spring on South Mediterranean tourism is difficult to evaluate with precision.

After decolonisation, the majority of the SEMCs placed tourism at the service of an economic development strategy. In the context of the rise of international tourism in the 1970s, their goal was to foster the creation of jobs in the service sector and attract more foreign currency and investments on their territory. This macroeconomic approach determined the development model for tourism in these countries, whereby priority was given to the creation of major tourist resorts, the range of seaside resorts and marketing via package tours. The orientation towards mass tourism has been a success for countries following that programme, insofar as it has allowed them to capture significant market share in European seaside tourism, as well as contributed to the socioeconomic development of vast coastal regions (the Tunisian Sahel, Agadir, the Red Sea, etc.). Yet the creation of such a specialised supply has likewise entailed negative consequences on the structural level. First of all, the strong seasonality of tourism has resulted in the casualisation of labour, low returns on investments and difficulty in developing real tourism industries (training, expansion of services offered). Secondly, given the absence of differentiation, regional competition has led to a price war between South Mediterranean destinations, which, under pressure from tour operators, seek to continually decrease the sales price of seaside stays. Finally, the products corresponding to this type of tourism are proving increasingly out of step with the evolution of international tourism, where the demand for authenticity is progressively taking the lead over stays at “tourism enclaves.”

4 The term “tourism enclave” designates self-contained spaces such as certain hotel-clubs, which are under surveillance in a secure environment and dedicated exclusively to tourists and the employees serving them. Cf. FREITAG TILMAN G. “Enclave Tourism Development: For Whom the Benefits Roll?”, Annals of Tourism Research 21, 538-554 (1994).
ended up limiting performance and growth potential in
the tourism sector (fall in product quality, rise in tourist
drain to other destinations, etc.).

The territorial structure of South Mediterranean tour-
ism is likewise problematic. The polarisation of tour-
ism activity in coastal areas has but aggravated the
development imbalances to the detriment of the hin-
terland. Moreover, the need to attract European cli-
entele has led South Mediterranean countries to
lend priority to a framework based on "points of en-
try" to their tourism areas, in which airport develop-
ment has played a key role. South Mediterranean
tourism has been built around major centres dedi-
cated to sedentary tourism (Marrakesh, Djerba,
Sharm el-Sheikh), which for a long time attracted
nearly all tourist flows and investments. This circum-
scription of activity, limited to several major destina-
tions, has not allowed countries to take advantage of
tourism's territorial planning function, for in the ab-
sence of an integrated offer on the national level, the
interstices between major centres of tourism and the
hinterland have remained poorly planned areas, un-
connected to tourist routes and therefore powerless
to attract them. With rare exceptions, the SEMCs
have not implemented policies of restructuring, seg-
mentation or upscaling that would allow them to
step up their attractiveness for tourism. Recent po-
litical changes, however, will certainly give them the
opportunity to adopt new strategies.

What Kind of Tourism after the Arab
Revolutions?

The crisis of the Arab Spring has revealed the obso-
lescence of tourism models based on both social
authoritarianism and a disconnected territorial offer,
where tourists are not faced with the socioeconomic
and political conditions experienced by the local
populations. The liberalisation of social and cultural
forces of South Mediterranean Countries would in-
dicate that this model will not survive the process of
democratisation. The main challenge facing the
SEMCs in the tourism sector thus resides in the ca-
pacity that these countries will have of coupling
democratic transition with transition in tourism.
The tourism transition of the SEMCs entails, first
and foremost, the transformation and modernisation
of their tourism economy. If we work with the hy-
pothesis that democratic transitions foster econom-
ic liberalisation and the adoption of major macroe-
conomic reforms,\(^5\) then the Arab revolutions open
highly positive perspectives for the advent of sus-
tainable tourism development in these countries in
the medium and long terms. This change requires
recasting tourism governance, banishing anticom-
petitive practices (corruption, nepotism) and im-
proving influence sharing among the actors of tour-
ism development (the private and public sectors,
civil society, local populations). In certain configura-
tions (in Tunisia and Morocco, for instance), admin-
istrative decentralisation can constitute a priority
goal. Further liberalisation of certain strategic sec-
tors seems likewise essential. This is the case in
particular with air transport, whose deregulation has
become indispensable to the increase in tourism
flows due to the rise of low-cost transport in the
world. The experience of Morocco, which signed an
Open Sky agreement with the European Union in
2006, has proven a model of success.

The crisis of the Arab Spring
has revealed the obsolescence of
tourism models based on both
social authoritarianism and a
disconnected territorial offer

The desire for emancipation expressed by the mid-
dle classes through the revolutions probably reflects
the capacity of these populations to enter the leisure
society. This is why democratic transition renders
the development of domestic tourism in these coun-
tries inevitable. This development would allow them
to stabilise and consolidate their tourism economy,
for domestic tourism, less sensitive to endogenous
or exogenous crises, is much less volatile than inter-
national tourism. Domestic flows are better distrib-
uted over time (less seasonality) and space (return
of city dwellers to their regions of origin), and na-
tional tourists are generally strong consumers of the
local offer, to which they have easier access (lan-
guage, culture, word of mouth). Moreover, domestic
tourism serves the national project insofar as it fos-

ters the appropriation of tourist areas by local populations, attenuating the tensions associated with occupation of the land by foreign tourism. The same arguments can be used regarding fostering South-South tourism, which would allow diversification of flows and stronger sub-regional integration, in particular in the Maghreb, where millions of Algerian and Libyan tourists already spend their holidays in Tunisia.

**Domestic tourism, less sensitive to endogenous or exogenous crises, is much less volatile than international tourism**

Finally, the social and economic urgency arising from the Arab Spring and the need to support job creation at any cost could relegate the environmental issues of tourism development to the background. However, ecological constraint remains imperative in these countries, where mass tourism has a serious impact on the environment, in particular along the coast (waste, concreting, overconsumption of water resources, threatened ecosystems). Moreover, in the next century, climate change will have grave consequences in the Mediterranean Basin, with a significant rise in temperatures, a fall in precipitation and a rise in sea level. These developments will influence the location and volume of tourist flows, as the heat waves become more frequent and water resources dwindle, in particular in Egypt and Libya. Under such conditions, the use of green technologies for adaptation to climate change can hardly be avoided in the SEMCs. But in the midst of this crisis in tourism investment, priority short-term issues may limit the capacity of policymakers to opt for these often costly prevention strategies.

**Conclusion**

The situation arising from the Arab Spring calls for South Mediterranean Countries to develop innovative sectoral strategies aiming to diversify investment, the product range and jobs in tourism, and to better segment their tourism market. Unless unrest and inaction prevail, the fall of the autocratic regimes should signal the opportunity for new governments to upgrade and democratise the tourism sector in their countries by fostering the implementation of good institutional practices and allowing all actors (private and public sectors, local populations and civil society) to make their voices heard and defend their interests. Considering the demands made by Arab populations and the delicate nature of structural changes to be undertaken, it seems that only this type of orientation, based on consensus and appropriation, would allow tourism development to accompany democratic transitions in these countries and vice-versa.