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Tunisia-Mass Tourism in Crisis?

Heather Jeffrey,

Sue Bleasdale,

Successive governments in post-colonial Tunisia have sought to develop mass tourism as an avenue for social and economic development. Political instability and increasing media coverage have more recently led to a dramatic reduction in foreign tourist arrivals. Tunisia provides insights into the intersections of modernity, mass tourism, authoritarianism and terrorism, and in a world marred by terrorist attacks it becomes increasingly important to analyse the specific contexts from which these emerge. This chapter aims to address some of these issues by evaluating mass tourism development in Tunisia, highlighting the social and economic advances Tunisia has achieved, before analysing the situation since the Jasmine revolution of 2011. In order to fully analyse mass tourism in Tunisia, we draw on our own experience, which includes over 30 years of research in Tunisia, and fieldwork carried out shortly after the March 2015 Bardo Museum attack in the capital city Tunis. Finally, the chapter looks towards the future of mass tourism in Tunisia, arguing that while mass tourism has delivered positive advances, if it is to continue to do so the industry must be diversified and adapted to meet new needs.

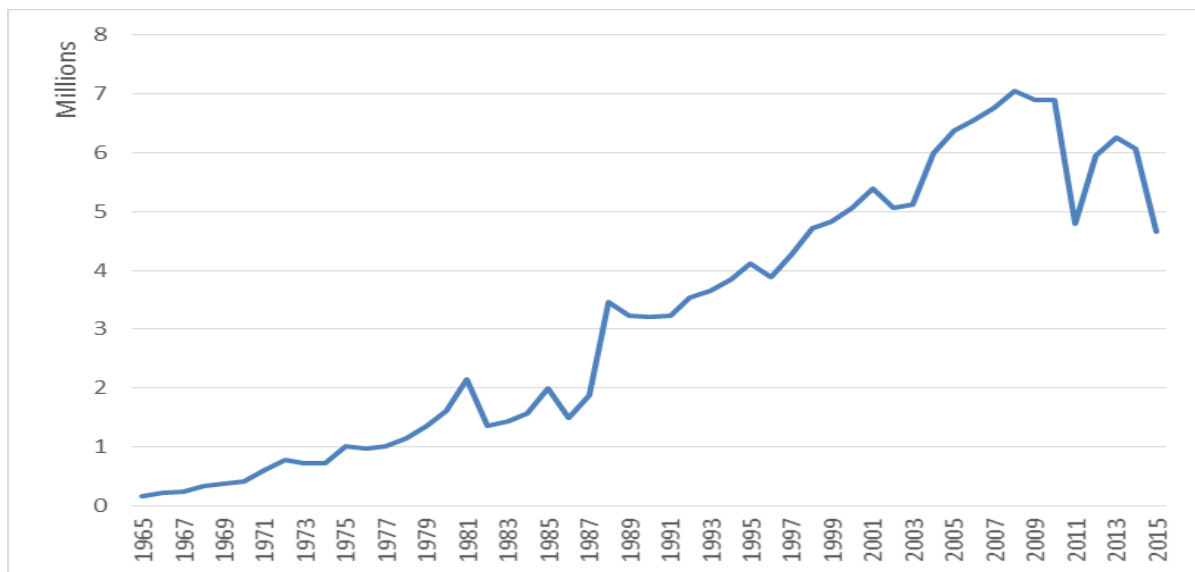
The Development of Tourism in Tunisia

Since independence from France in 1956, tourism has become an integral part of Tunisia's development strategy, with the initial impetus coming from Habib Bourguiba, the first President. National Five Year development plans consistently featured a strong role for tourism development, based largely upon expected economic benefits (Bleasdale & Tapsell, 1999). Tourism began to grow under these interventions, which included the founding of the 'societe nationale hoteliere et touristique' (National Society of Hotels and Tourism, SHTT) in the 1960s, responsible for 40% of accommodation constructed between 1960 and 1965 (Cortes-Jiminez et al., 2011). The accommodation sector initially state led, was almost entirely controlled by SHTT in 1962, but incentives provided by the government and *infatih* (the process of opening the country to private investment, mostly Tunisian) later meant that

by 1968 almost 83% was privately owned, mostly owned by members of the Tunisian elite (Hazbun, 2008).

In the 1960s foreign direct investment in the tourism sector stood at around 3%, but by the early 1970s and with help from the World Bank this had grown to 10%, and by 1977 petrodollar finance became a major source of foreign direct investment bringing the total up to 11.7%, which grew again to 32% in the early 80s (Hazbun, 2008). Between 1970 and 1995 bed capacity in the country as a whole grew by 127,201, almost five times the capacity in 1970 (Poirier, 1995). By the 1970s, Tunisia was one of the fastest growing tourist destinations in the world (Poirier, 1995), and a clear upward trend in international arrivals can be seen from figure 1, as can the impact of the Jasmine revolution of 2011.

Figure 1: The evolution of international tourist arrivals



Source: Created from data available in Portail Open Data, 2016 and the Ministry of Tourism and Handicrafts, 2016

The tourism product developed and sold by the Tunisian government has historically been based on coastal mass tourism, which is organised through large-scale package holidays. The government initially experimented with luxury accommodation in the 1960s, before shifting to meet the needs of the dominating market segment of mass tourism (Cortes-Jiminez et al., 2011). Tourism has been heavily concentrated in the area of Hammamet-Nabeul, which in

the 1990s held over 70% of hotel bed capacity (Poirier, 1995). This regional domination by the Hammamet-Nabeul area continues today and over 38% of all tourist nights were spent in the Hammamet-Nabeul and Sousse-Kairouan area in 2010 (Office National du Tourisme Tunisien, 2010). Other major resort areas include the artificial man-made resort of Yasmine-Hammamet, Monastir-Skanes, Mahdia-Sfax, and Djerba-Zarzis. In the 1990s, the Tunisian government sought to diversify the industry by initiating 'le tourisme saharienne' (desert tourism) and in 1990 there was the first direct flight between Europe and Tozeur (Gant & Smith, 1992). However, this initiative has largely failed to attract new markets or entice mass coastal tourists inland (with the exception of excursionists), and in 2010 approximately 90% of all bed nights were spent in coastal resorts (Office National du Tourisme Tunisien, 2010).

The prominence of Tunisia's tourism model was noted in De Kadt's (1979) seminal text on mass tourism, and the country was discussed in two chapters (Smaoui, 1979; Groupe Huit, 1979). Smaoui (1979) highlighted the importance of the industry in providing indirect employment in both agriculture and handicrafts, which meant that the most disadvantaged in society were benefitting. However, at the end of the 1970s, several risks were also highlighted. Enclavism meant that tourist zones received improved infrastructure, which could later lead to host-guest friction (Smaoui, 1979), and strain was put on water supplies (Groupe Huit, 1979). Indeed, while many of Tunisia's coastal resorts can be described as enclaves, in Tunisia enclave tourism only 'succeeds in making the intercultural contact transitory but does not entirely limit the impact. In many beach enclaves, European values and activities reign supreme' Poirier (1995:204).

Arguments concerned with the relationship between intercultural contact and impact position Tunisians against Europeans, considering Tunisian culture and values as dramatically different to European. Yet, for many Tunisians this is arguably not the case, and often the similarities between 'host' and 'guest' are underestimated, similarities that have been promoted by a secular government since independence (Hazbun, 2008). Additionally, initially the tourist zones attracted the most improved infrastructure, but later even the most rural areas received improvements such as electricity and wells for water supply. This is exemplified by the rural electrification programme which led to a dramatic increase in rural households with access to electricity, from 6% in the 1970s rising to 88% by the end of 2000 (Cecelski et al., 2005).

By the mid-1970s, hotels attempted to increase prices, only to be opposed by international tour operators who could not charge more for the standardised product, which left many hotels in a state of disrepair (Hazbun, 2008). Tunisia's relationship with tour operators dates back to the 19th century, when Thomas Cook & Son included the country as part of a tour, but since then the relationship has become more unequal. By 1972, 68% of all hotels were non-luxury and five years later tourism officials began to 'diversify' the tourism product, which led to the construction of the tourist enclave of Port el Kantaoui near Sousse, a man-made integrated complex in an Andalusian style, providing 15,000 bed spaces, an artificial marina, tennis courts and golf courses (Hazbun, 2008). This style of artificial holiday village became a blueprint for future developments, and in the 1990s Yasmine-Hammamet was created south of Hammamet. Yasmine-Hammamet is home to some of the most luxurious hotels in Tunisia, a man-made medina, a family theme park, religious museum, and a golf course. However, although the resort offers luxury, one hotel manager explained that even in 2012 tour operators still dictated the prices. While some might consider the resorts of Port el Kantaoui and Yasmine-Hammamet distasteful and inauthentic, the artificial marina just outside Sousse attracts many members of the Tunisian middle class, as does the man-made medina in Yasmine-Hammamet. In both resorts second homes for wealthier Tunisians dominate the private villa residences (local resident, 2011).

According to Mintel (2012) there is no official statistical source on domestic tourists, but domestic expenditure has consistently risen since 2005, only stagnating in 2011. It has been suggested that domestic tourists were previously priced out of the tourism market due to exclusion from the low prices achieved by European tour operators (Mintel, 2012). Even though this may have been the case, in 2012, according to one tour guide, the Tunisian middle class has taken advantage of second homes and holiday homes in coastal areas, often to the detriment of locals wanting to buy or rent a first home. Furthermore, family theme park attractions such as Park Hannibal in Yasmine Hammamet attract domestic tourists rather than international tourists who primarily visit Tunisia for the beach.

Tourist and host interaction may have been limited by enclave developments, but European style hotels became an iconic symbol of status and Tunisians able to afford it wanted to share the same spaces as the western 'Other' (Groupe Huit, 1979). As even recent tourism policy has continued to focus on coastal mass tourism, a key challenge for mass tourism to Tunisia has been, and remains, to diversify the market away from the key sources of France, Germany, Italy and the UK (Republic of Tunisia Ministry of Tourism and Handicrafts, 2016)

The search for new and additional markets has been a continual theme in tourism policy since the 1990s, but this search is now more urgent.

Key Tourist Markets

Tunisia is attracting an increasing number of North African tourists and in 2010 such tourists constituted 42.4% of all arrivals but only 4% of bed nights (portail open data, 2016). By contrast Europeans continued to stay longer and spend more (Office National du Tourisme Tunisien, 2010; Poirier, 1995). In 2010 more than 82% of all tourist nights were spent by Europeans, and the key tourist generating countries for Tunisia were (in order of prominence) France, Germany, Britain, Italy, Russia, Belgium, and Poland (Office National du Tourisme Tunisien, 2010). Tunisia has had an especially productive relationship with the European Union: in 2005 it was responsible for 67% of capital flows into Tunisia, a large share of in-bound tourists, and home to the largest community of expatriate Tunisians (OED, 2005). At the same time, this undoubtedly leaves Tunisia vulnerable to external developments.

Surprisingly, since the global economic crisis of 2007-08 and in the aftermath of both 9/11 and the terrorist attack in the Tunisian island resort of Djerba (2002), tourism arrivals recovered quickly (see figure 1) due to the perception of Tunisia as a cheap destination (ILO, 2011), as well as promotional campaigns, price reductions and the continuing process of an open skies agreement (Weisskopf & Schlumberger, 2012).

Before the Sousse beach attack in 2015 the open skies agreement saw an increasingly competitive offering of flights between Europe and Tunisia which had previously been limited to the scheduled flights of by the national carrier Tunisair and tour operator charter flights. Despite the fact that Europeans stay longer and spend more, tourist receipts (per capita) in Tunisian resorts remain markedly less than in competitors such as Spain, Morocco, Egypt, Turkey and Croatia (UNWTO, 2015). This could be explained by the type of tourist they attract, or a lack of opportunities to spend, and there are clear opportunities for the country to increase tourist spending, for example, through promoting and developing the thalassotherapy spa industry, where sea water is used as a form of therapy.

The promotion of Tunisian tourism was previously organised by the Tunisian National Tourism Office (TNTO), but since 2013 has primarily been the responsibility of Publicis, a French publicity agency. TNTO has previously worked with other agencies, such as Rooster

in the UK, based on the location of target markets, but there were many changes after the Jasmine revolution. According to a TNTTO representative, interviewed in 2015, the organisation allocates on average over half of its marketing budget on Germany, the UK, Italy and France, and the rest of the budget is directed at secondary markets, mainly in Europe. Further evidence of the focus on Europe is illustrated by the fact that promotional material for 'Be in Tunisia,' a current tourism campaign, is available only in English, French, German, Italian and Japanese. TNTTO purposefully distanced itself from Islam, always avoiding religious symbols when organising stands at travel markets, for example, a reflection of the policy of seeking growth and recovery among traditional mass tourists, albeit in additional new markets. However, while promotional activities are skewed towards the predominant European markets, in 2011 the Middle East was one of the few growth markets (portail open data, 2016). Moreover, Tunisia is home to Kairouan, one of the holiest places in Islam, which would present an opportunity for the country to attract religious and spiritual travellers if both the supply and promotional activities were directed towards this market.

The Middle East and North Africa (MENA) markets are not the only potential areas for growth. That of China is clearly numerically significant, and the Chinese seem to be less risk aware than some European markets. A growth rate of 157.4% in arrivals from China was observed between 2010 and 2011 (from 4,612 to 11,872 visitors) (portail open data, 2016). Two weeks after the Bardo attack in March 2015, a tour guide, ushering a group of more than 30 Chinese tourists around the country, explained they were unaware of the political instability of the country or the recent terrorist attack. In fact the manager of the company stated that the Chinese market is the only one that has remained constant, which could present a future opportunity for Tunisia. In addition, the tendency of Chinese tourists to travel in groups would allow for the existing mass tourism infrastructure to accommodate them quickly.

[Employment and the Economy](#)

The Tunisian economy has diversified from a mainly resource-based economy focussed on the export of oil and gas to textiles, tourism and the production of olives and cereals. The limited possibilities in non-tourism sectors has increased the overall attractiveness of tourism as an employer. Only 3% of arable land is irrigated, oil and gas reserves are depleting, and

textile production is facing increasing global competition, especially from China and Bangladesh (OED, 2005). Interestingly, the increase in unemployment beginning in 2008, which contributed to the rise of dissatisfaction leading to the Jasmine revolution in 2011, can be mainly attributed to job losses in the textile sector and a growing bottleneck on emigration due to the global financial crises (ILO, 2011).

Before the terrorist attacks in 2015 and yet after the Jasmine revolution, the tourism industry contributed (indirectly and directly) 15.2% to Tunisia's GDP in 2014 (WTTC, 2015). Before 2011 Tourism development in Tunisia had been responsible for a continuous increase in direct employment. By 2006, the sector was employing about one third of the Tunisian working population (ILO, 2011), and in 2010 around 96,611 people were directly employed by the industry and an estimated further 289,833 were indirectly employed (Office National du Tourisme Tunisien, 2010). The World Travel and Tourism Council (WTTC, 2015) calculated that in 2014 the industry directly supported 230,500 and indirectly supported 473,000 or 13.9% of total employment.

The quality of jobs offered by the tourism industry is often the subject of scrutiny but, when compared with other sectors, tourism provides a higher level of job security. Around 58% of all tourism jobs are under temporary contracts, compared to more than 68% of textile jobs, where 80% of the workers are female (ILO, 2011). Nevertheless, it has been suggested that 22.5% of jobs in the tourism sector belong to women, which is less than the overall percentage of female workforce participation at 26%, and horizontal segregation is a challenge within the sector, as over 70% of female jobs are thought to be in housekeeping and reception (Karkkainen, 2010). Overall, investment in human development has not yet translated into increasing the proportion of women workers and while Tunisia has the highest rate of overall female labour force participation in the region, the tourism industry must work harder to change social norms and provide more jobs deemed appropriate for women.

Social Development

Tourism has undoubtedly provided jobs for Tunisians and contributed to the growth of the GDP over several decades but there are other, less tangible contributions made by the industry. President Habib Bourguiba, educated in France and who arguably looked towards both the French and the policies of Ataturk in Turkey to develop his country, specifically chose tourism as the focus of development (Hazbun 2008). He viewed tourism as a vehicle for modernisation, and one which could portray Tunisia as a forward-thinking friend of western countries. His more extreme policies to secularise Tunisia included 'un-veiling' Tunisian women, and the mooted abolition of Ramadan. Bourguiba introduced such dramatic legislative changes as The Family Status Code, which improved the legal status of women, as part of his focus on human resource development and modernity (OECD/ African Development Bank, 2008). Ultimately, tourism played an important role in creating a positive external image for Tunisia, based on women's rights, friendliness towards western powers and openness (Hazbun, 2008).

Bourguiba's 'modernising' ideology, however, was the source of his downfall, and in 1989 an Islamist uprising led to his replacement by President Ben Ali (Hazbun, 2008). However, while the leadership changed, the ideology did not. Rather, Ben Ali maintained Bourguiba's modernising project by continuing to focus on tourism for development and attempting to secularise the nation by introducing such laws as the prohibition of veiling and beards (Louden, 2015). Both leaders used political Islam to justify their own policies, utilising a fear of jihadism to legitimise authoritarian rule and secular policies (Louden, 2015). Ultimately, corruption, rising levels of youth unemployment and poverty, along with regional inequalities, culminated in the Jasmine Revolution and the downfall of President Ben Ali.

Although there has been a dearth of democracy in many MENA countries, as highlighted by the Arab Spring, numerous social and economic advances were achieved under the rule of Bourguiba and Ben Ali. By 2005, the per capita income was US\$2,000, two and half times that of 1975 (OED, 2005), and in the 11th National Plan the figure for 2006 was calculated to be US\$4064 (Republic of Tunisia, 2007). Since the 1970s Tunisia also made some dramatic advances in social indicators, including reducing the poverty rate from 40% to 4% by the year 2000, and by the mid-1990s almost all children attended primary education (OED, 2005). Between 1970 and 2013, infant mortality was reduced from 122.2 to 13.1, and female and

male life expectancy rose from 52.288 and 50.052 to 75.9 and 71.5 respectively (World Bank, 2016). One of the most notable areas of progress has been in gender equality, in which Tunisia has led the MENA region. Gender gaps in education are low, and the gender parity index for primary and secondary enrolment evolved from 0.6 in 1971 (a disparity in favour of males) to 1.01 (a disparity in favour of females) in 2011 (World Bank, 2016). While it is impossible to attribute these advances solely to tourism, it has to be recognised that tourism has been pivotal in all Tunisia's development plans (Bleasdale & Tapsell, 1999; Hazbun, 2008).

Tourism and Terrorism

Terrorism can be related to political instability, where social order and control have been lost, and political upheaval in post-Jasmine revolution Tunisia may have exacerbated terrorist activities. The targeting of tourists by terrorists serves several objectives: publicity, economic disruption, and promotion of ideological opposition to tourism (Sonmez, 1998). Where tourism is a major feature of an economy, it is especially vulnerable. After the 2011 Jasmine revolution, tourist arrivals in Tunisia fell dramatically, though tourism from some markets fell more than others, notably the French, German and Italian (-42%, -41%, -67% respectively) (portail open data, 2016). At the time of writing, international tourist arrivals are showing no signs of recovery from the 2015 terrorist attacks at the Bardo Museum and the Coastal tourist resort of Sousse (see figure 1), but they were not isolated events.

Since President Zine el Abidine Ben Ali fled the country in January 2011, Salafist riots protested the availability of alcohol in Tunis, Sfax and other cities in June 2012; in September 2012 the US embassy and American school in the capital were attacked by the group Ansar al Sharia; in 2013 two secularist politicians were assassinated; in October 2013 a suicide bomber detonated in Sousse; and in July 2014 15 Tunisian soldiers died in an operation on the Algerian border (Arieff & Humud, 2015). There have also been numerous smaller attacks in recent years, especially on the border with Algeria, but these have not involved foreign nationals or attracted foreign media to any extent. Tourist reactions to terrorism are often delayed because of the expense of cancelling a holiday abroad, and the belief that lightning does not strike the same place twice (Sonmez, 1998). This could explain why several hotel managers interviewed during field work in Sousse were reporting having received few immediate cancellations, but no new reservations, directly after the Bardo museum attack.

Some scholars have considered the continued practice of veiling as reflecting opposition to tourism (Poirier, 1995), and Dlużewska has suggested host-guest friction might be reduced if tourists with closer cultural norms and values were attracted (2008). Yet, in Tunisia there is limited evidence of host-guest friction. According to a local tour guide there is more friction between Tunisians working in tourism and those not. Additionally, any friction between hosts and guests also appears to be intensified during economic crises as observed over the past 35 years. However, it is too simplistic to blame tourism, as a symbolic display of western and counter-Islamic values, for recent terrorism in Tunisia, for such an analysis overlooks much of the specificities, especially the local and global political context.

In fact, many Tunisians judge European non-Muslims very differently to Muslims of any nationality, often allowing them a freedom to behave in ways which may be unacceptable for the local population, in the right contexts. It has been observed that non-Muslim European tourists may eat, drink and smoke freely in the tourist areas during Ramadan, but tourists from neighbouring Libya and Algeria attract criticism if they do the same. Muslims are expected to behave as socially and religiously stipulated, exemplified after the Arab Spring when the South of the country became a refuge for many Libyan immigrants, who often failed to conform to social expectations. This situation was observed by one of the authors whilst living in Sfax, Tunisia during the summer of 2012. Similarly, Algerians in the area of Nabeul-Hammamet are resented by some Tunisians, as they rent local properties, thus contributing to rent inflation, and often engage in socially unacceptable activities, for example, conspicuously drinking alcohol as reported by a local tourism company owner.

Whilst, what we have highlighted will not absolve tourism from all blame, we hope the evidence above adds a layer of complexity. Many Tunisians are happy with European mass tourism and tourists, but a few (especially those who are marginalised by the industry, often in the interior of the country) feel resentful towards the industry. Some Tunisians mimic European styles, whilst others choose more traditional ways of life, but the political and historical context demands tourism is considered within the wider social and political sphere. Tourism was utilised as a political and economic vehicle and some Tunisians are less than satisfied with its chauffer.

[Looking to the Future of Tourism in Tunisia](#)

Several factors are relevant when discussing the future of Tunisian tourism. It has been suggested that historically political Islam and a fear of jihadism have been mobilised to create support for secularism (Louden, 2015). During the fieldwork carried out in 2015, a minority of the research participants and some residents explicitly stated a desire for the return of the old regime and the re-establishment of authoritarian rule in the country. If authoritarian rule (not supported by the authors) were to return in Tunisia, the MENA context stabilised, and public perception in the overseas markets improved, the tourism industry in Tunisia might recover. The recovery would be focused on 'business as normal', and potentially little would change the structure of the industry. However, if the three objectives of the recent attacks were indeed to gain media attention, show ideological opposition to tourism, and disrupt economic activity; after the Bardo museum attack only the first two were met, as tourists did not cancel. The real impacts were not felt until after the Sousse beach attack. According to hotel staff, French tourists travelling to the Bardo Museum just days after the attack were demonstrating solidarity with Tunisians. Yet, whilst there was also an on-going social media campaign in Europe utilising the hashtag 'I will come to Tunisia', two weeks after the Bardo attack, there were few cancellations but also few new reservations (as highlighted previously). Questions of responsibility for the Sousse attack will continue at least until the UK inquest in 2017, but the social media campaign may have aggravated and induced a second attack, if the terrorist groups believed that the response of tourists had been the opposite of their expectations.

In 2015, after the attack in Sousse, the major tour operators suspended all forward bookings to Tunisia, and in January 2016 Thomas Cook and TUI suspended bookings to Tunisia until October 2016 (Porter, 2016). In February 2016, European government travel advisories were still warning against travel to Tunisia due to a perceived lack of security in the country. As long as such advisories remain, tourism from the EU will be severely compromised if only because tourists cannot get travel insurance while governments formally advise against travel. (see for example fco.gov.uk, 2016 or European Commission Travel Advice, 2016).

The previous sections have identified two main objectives for the future of tourism in Tunisia:

- 1) Tunisia must recover the number of arrivals if the supply remains focussed on mass tourists and
- 2) There is a clear opportunity to encourage tourists to spend more.

Regardless of tourist behaviour after the Bardo attack, the attack on Sousse in June 2015 led to a severe and ongoing decline in tourist arrivals. However, as noted previously, several tourist markets appear more resilient, notably the Middle East, China, and Morocco as the growth markets after the Jasmine revolution. Moroccan tourists, though, are a small fraction of MENA arrivals; they tend to stay longer than Algerians or Libyans, but not as long as Europeans (portail open data, 2016). More generally, it might be possible to transform the supply and promote the product to grow these markets, perhaps by focussing on thalassotherapy, health tourism and religious tourism for MENA markets (see Figure 2). The true impact of the terrorist attacks in 2015 will not be known until statistics for 2016 regarding arrivals by nationality become available.

As previously noted, a further area for future development may be enticing European tourists to spend more, predicated upon a more stable and secure context. Until recently, the image of the country as a cheap destination has proved an advantage in the face of global financial crises. However, Tunisia has a wealth of tourism resources, for example, thalassotherapy, desert safari, the English Patient and Star Wars film sets, and some of the best conserved Roman, Phoenician and Punic heritage sites, which could be drawn upon to create new products, but to capitalise on these assets the sites must be improved and the accommodation sector upgraded if higher spending tourists are to be attracted. Such a transformation will require a medium to long term development strategy and considerable investment, difficult to achieve in the currently very uncertain context of Tunisia (Euromonitor International, 2015)

Five potentially viable trajectories that could be followed by the tourism sector have arisen from this discussion of mass tourism in Tunisia, as indicated in figure 2. As previously noted both arrivals from the Middle East and China increased after the Jasmine revolution, and whilst the supply may need improving to further entice high spend tourists from the Middle East, little change in tourism infrastructure will be needed to accommodate the small but growing number of Chinese mass tourists. Moreover, the wealth of religious resources could be promoted to attract religious and cultural tourists. However, in the context of the growing secular/religious divide that has emerged in Tunisia, the development of religious tourism would need to be developed very carefully and sensitively. Other strategies could be to develop domestic tourism, which will be challenging in the current economic climate, and to attract niche markets although this would demand the costly adaptation of supply and promotion. Ultimately, any strategy will depend upon achieving a secure and stable destination.

Figure 2: Tourism alternatives for the future

MENA Market	<ul style="list-style-type: none"> • Small number of high spend tourists from Saudi Arabia and Qatar at present e.g. hunting parties. • Middle East one of the few growth markets after Jasmine Revolution • Growth will require tourism infrastructure of a higher quality. i.e investment • Lower spend tourists from North Africa limited due to regional instability.
Islamic tourism	<ul style="list-style-type: none"> • If regional stability is attained, may have the greatest potential for sustainable growth of mass-tourism. • Tunisia could become a ‘religious’ destination for Islamic tourism from lower socio-economic groups. • Similar to current mass tourism with a religious ‘overlay’ • Potential political and social opposition
Domestic market	<ul style="list-style-type: none"> • Growth would fit readily into the existing tourism infrastructure. • Domestic tourists tended to use tourist infrastructure during the high season before the Jasmine Revolution competing with European mass tourists for accommodation • Growth is unlikely given the reduced GDP arising from falling international tourist numbers fuelling the rise in unemployment. • Potential to attract domestic tourists during the cheaper low season.
High- spend niche markets	<ul style="list-style-type: none"> • Would require re-direction of promotional activities, new investment in accommodation and improvements to transport facilities. • Potential to address regional inequality. • More likely to succeed in the medium and long term if investment is available .
Emerging markets	<ul style="list-style-type: none"> • Positive short term option. Chinese and Russian markets resilient and fits readily into the mass tourist infrastructure • Long term may be undermined by shrinking Chinese and/or Russian economy. • Greater cultural distance between China and Tunisia than existing markets; language problems would be considerable despite the Tunisian propensity for learning languages.

Source: Authors’ own elaboration (2016)

Whichever strategies are to be followed, other constraints remain. Water supplies are irregular, for example, during the summer months many cities do not receive running water during daylight hours (noted during the summer of 2012 when one of the author's spent six months in Sfax). Climate change will impact heavily on Tunisia, and the Tunisian government is likely to face many challenges in the coming years. In 2003 the 1st International Conference on Climate Change and Tourism was held in Djerba, Tunisia. The conference highlighted intensified water usage by tourists and the tourism industry, and suggested water rationing maybe necessary in the future regardless of climate change (WTO, 2003). In Tunisia the tourism sector has the highest rate of water consumption across all sectors (Eurostat, 2009). Moreover, water stress caused by tourist consumption (nine times as much as domestic) primarily impacts areas which already suffer from water shortages, and after all Tunisia is an arid country, and water has to be transferred from region to region (WTO, 2003).

In Djerba, the supply capacity of water is 0.36 m³ per person per day, but the average daily tourist consumption is 0.76 m³. (Bourse, 2011). In addition, demand for water is highest in the dry summer season when tourists, locals and farmers compete for water. Other environmental issues facing the future sustainability include land use patterns, desertification, waste management, beach erosion, energy consumption and biodiversity (Bourse, 2011). The situation is critical and by the end of the last decade it was noted that "The scarcity and fragility of natural resources is in fact the most disturbing problem, because mobilisation of Tunisian water and land resources has reached its limits." (OECD, 2008: 595). Tunisia has introduced some measures to manage issues relating to climate change, such as subsidies for the use of solar power in hotels, but regardless of these measures, global climate change will undoubtedly intensify water supply shortages (WTO, 2003).

Conclusion

Tourism has contributed much, directly and indirectly, to the social and economic development of Tunisia, while being promoted by the first president since independence from France due to his belief that tourism could be a vehicle for modernisation and a way to portray the country as modern and European. Whilst it is difficult to separate tourism from other influential factors, mass tourism has been part of the development project instigated in

Tunisia since independence from France. Overall, it has contributed to significant social gains, especially in poverty reduction, education, health care, employment and gender equality. It has also offered jobs that are more secure than those in other industries, for example the textile industry as discussed previously, and has been a consistent source of revenue.

Mass tourism contributed 15.2% to Tunisia's GDP in 2014 (WTTC, 2015), but this was before the terrorist attacks in 2015. Terrorism is not a new phenomenon in Tunisia, but what is new is the use of social media by tourists to engage with the phenomena, as exemplified by the hashtag 'I will come to Tunisia' campaign, and this could be an avenue for future research. In view of the current instability, if tourism is to continue to contribute to Tunisia's economic growth, it should be re-evaluated and diversified to include different and emerging markets, which will attract higher spending tourists. For this to happen, perceptions need to change, for example, of Muslim tourists; as indicated earlier, many Tunisians judge foreign non-Muslim tourists with different moral standards to Muslim tourists. However, regardless of the impact of political instability on the mass tourism industry, long term strategies must be implemented in order to increase the environmental sustainability and viability of tourism. Whilst Tunisia has implemented some strategies to minimise their carbon footprint, global climate change will contribute to existing water stress.

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