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THE TOURISM REVOLUTION IN THE MEDITERRANEAN, 1950-2005

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ABSTRACT

The explosion of mass tourism since the end of the Second World War has had a tangible effect on crucial flows of manpower, investment and production strategy towards the leisure economy in a large part of the world, with changes that take us back to what occurred two hundred years earlier in the heat of the Industrial Revolution. However, perhaps it is in particular areas (as was the case with the thrust of industrialisation) such as the Mediterranean basin, where this view can be identified more accurately. Both approaches are reflected in the key objectives of the work.

In the first section of this research we discuss the major figures available on the growth of tourism since the Second World War, whilst at the same time outlining the fundamental theoretical keystones of the study: the claim with regard to a particular techno-economic paradigm in the case of mass tourism, involved in the fifth technological revolution seen since the Industrial Revolution. The second section deals specifically with the Mediterranean in its main tourism elements, based on the sources available: number of visitors, overnight stays and tourism expenditure. Finally, some conclusions are offered in order to summarise the work.

Keywords: First Comers and Late Comers in Mass Tourism Economics. Techno-economics changes.

RESUMEN

La eclosión del turismo de masas a partir del final de la Segunda Guerra Mundial ha tenido un notable efecto económico en una gran parte del mundo: en los flujos de mano de obra, en las corrientes de inversión y en las estrategias productivas hacia la economía del ocio. Tales cambios nos recuerdan lo sucedido hace doscientos años al impulso de la Revolución Industrial. Sin embargo, tal vez sea en áreas específicas como por ejemplo como la cuenca mediterránea, (tal como ocurrió en las primeras fases de la industrialización), donde identificamos el fenómeno con mayor precisión. Ambas perspectivas están presentes en los objetivos de este trabajo.

En la primera parte de este trabajo se plantean las principales gráficas disponibles sobre el crecimiento del turismo desde la Segunda Guerra Mundial, al mismo tiempo, que se esbozan los postulados teóricos del estudio: la que se refiere, en el caso del turismo de masas, a la aparición de un paradigma tecno-económico particular que participa en una quinta fase de revolución tecnológica desde la Revolución Industrial. La segunda parte trata específicamente del Mediterráneo y de sus principales rasgos turísticos, apoyándonos en las principales fuentes disponibles: número de visitantes, pernoctaciones y gasto turístico. Por último, se presentan algunas conclusiones preliminares que resumen el trabajo.

Palabras clave: First Comers y Late Comers en el turismo de masas, Cambio económico. Paradigmas tecno-económicos.

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1. Introduction ¹

Within the context of economic history, it is now commonplace to talk about the Industrial Revolution as a fundamental phenomenon which transformed the evolution of mankind from the 18th century onwards. The process, understood here as a long path which responds wholly to drastic, ground-breaking factors (according to the latest research undertaken by economic historians), has however emphasised the importance of extreme changes in the fields of technology, demography, economics, sociology and culture. In spite of the different interpretations of the issue, a common link between them all would undoubtedly be the turnabout resulting, albeit gradually, from the emergence of this “Great Transformation”, in the in the Karl Polanyi sense, in the composition of the employment market and of the economic structure of nations since 1770. In short, the growth in assets, both personal and generated by income, allocated to the secondary sector.² This is the idea presiding over this research, in two specific directions. On the one hand, the explosion of mass tourism since the end of the Second World War has had a tangible effect on crucial flows of manpower, investment and production strategy towards the leisure economy in a large part of the world, with changes that take us back to what occurred two hundred years earlier in the heat of the Industrial Revolution. However, and here is the second element to be considered, perhaps it is in particular areas (as was the case with the thrust of industrialisation) such as the Mediterranean basin, where this view can be identified more accurately. Both approaches are reflected in the key objectives of the work.

¹ This work forms part of the research project *Economic history of mass tourism in Spain, 1940-2000: the Balearic Islands and Mediterranean contrasts* (reference SEJ2004-06649/ECON), funded by the Ministry of Education and Science. The research has been presented during scientific sessions at the University of Florence, the University of Bologna, La Sapienza University in Rome, the University of the Balearic Islands, and will soon be presented at the London School of Economics. We appreciate the comments of an anonymous referee who read the text for publication as a working paper on DT-AEHE

² The existing bibliography on the Industrial Revolution is vast. In fact, new works on the subject emerge every year in an attempt to enrich or enhance the knowledge already in existence. It is not the intention of this note to establish a brief status of the subject, but simply to point out that the perspective defended in relation to the development of industrialisation is more in keeping with gradualist thinking than with the vanguardist stance, in the sense that the Industrial Revolution involved the prior accumulation of historical experiences which embraced different spheres: the institutional, the political, the social, the cultural and the economic, where the focus on technology was one more cog in this complex wheel. These premises our useful in order to gain a greater understanding of the change which, in turn, it has been possible to identify between 1940 and 1950 resulting from the clear progress of “tertiarisation” in the western economies, and the importance gained by tourism activity in these parts.

The research is based on statistics provided by the World Tourism Organization (WTO), existing with certain gaps since the 1940s until the present day; and materials from Spain's National Statistics Institute (INE), and the resources of the Official Chamber of Commerce, Industry and Shipping of Palma de Mallorca (COCIN).³ All of this documentation, supported by the corresponding bibliography⁴, has made it possible to reconstruct and systemise the data required in order to meet the two fundamental objectives mentioned above. To this end, the research is arranged into the following sections. The first section will discuss the major figures available on the growth of tourism since the Second World War, whilst at the same time outlining the fundamental theoretical keystones of the study: the claim with regard to a particular techno-economic paradigm in the case of mass tourism, involved in the fifth technological revolution seen since the Industrial Revolution.⁵ The second section will deal specifically with the Mediterranean in its main tourism elements, based on the sources available: number of visitors, overnight stays and tourism expenditure. Finally, some conclusions are offered in order to summarise the work.

³ The statistics from the twenty-two countries of the Mediterranean basin, gathered by the WTO since the 1930s, have been systematically processed, although their level of reliability is higher from the 1950s onwards, as they are more homogenous. Work has also been carried out on the variables corresponding to the balance of payments in France, Italy and Spain, compiled by the central banks and the national statistical services of each country since 1970. Finally, the materials stored in the *Cámara Oficial de Comercio, Industria y Navegación de Palma de Mallorca* have been studied, with a vast amount of data, albeit dispersed, on the tourism markets in general and the figures for the Balearic Islands in particular, since 1930.

⁴ The apparent lack of academic interest in relation to the economic analysis of tourism, an activity which is measurable and pressing in economic structures, and crucial in order to reconcile balances of payments, is both undeniable and reprehensible. At the same time, it involves a broad value chain which is of paramount importance to countries with low incomes, in their legitimate aim to extract themselves from situations of poverty and arrears. In this regard, see WALTON (2002) and CALS (2003). This indifference is more pressing in the case of economic history. On consulting the international literature on the subject, it can be said that we are faced with a heterogeneity of materials ranging from very specific case studies (which at times are not very representative) to more ambitious works which encompass sets of tourism economies or relevant examples which are of particular significance in themselves. By way of example, see ARON (1999) in relation to holiday patterns in the United States up until the first half of the 20th century; RICHARDSON (1999), with regard to the importance of the tourism economy in Australia since the end of the 1800s; BARANOWSKI-FURLOUGH (Edits.) (2001) on the development of tourism in the United States and Western Europe in the 19th and 20th centuries; BATTILANI (2001), who analyses the growth of European tourism, does not forget the experiences of poor countries and, in short, expresses the Italian regional view on mass tourism; TISSOT (Dir.) (2003), who adopts the view of tourism as an industry and not just a service; SOSHIRODA (2005), with regard to the tourism policies promoted in Japan between 1859 and 2002; GIRELLI (2006), who studies in depth the development of tourism and the urban changes in the city of Rome; and SEGRETO-MANERA-POHL (Edits.) (2009), studying different major cases in mass tourism in the Mediterranean since the 1940s. From a generalist perspective, the work published by FERNÁNDEZ (1991) continues to be an essential reference.

⁵ This approach is inspired by the theoretical contributions from C. Pérez, particularly in his analyses of the emergence of the economic changes in the areas experiencing technological revolutions, and his

2. From economic history ... to the future? Mass tourism as a new techno-economic paradigm

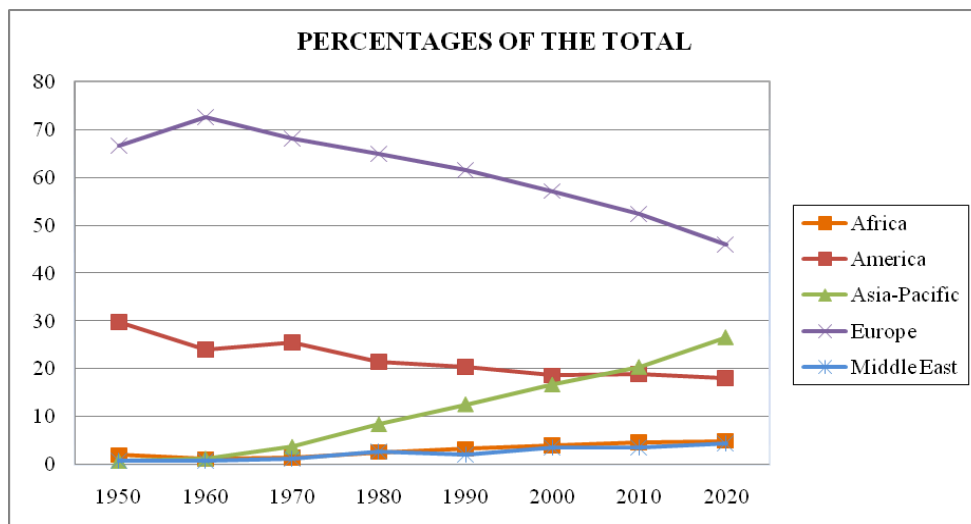
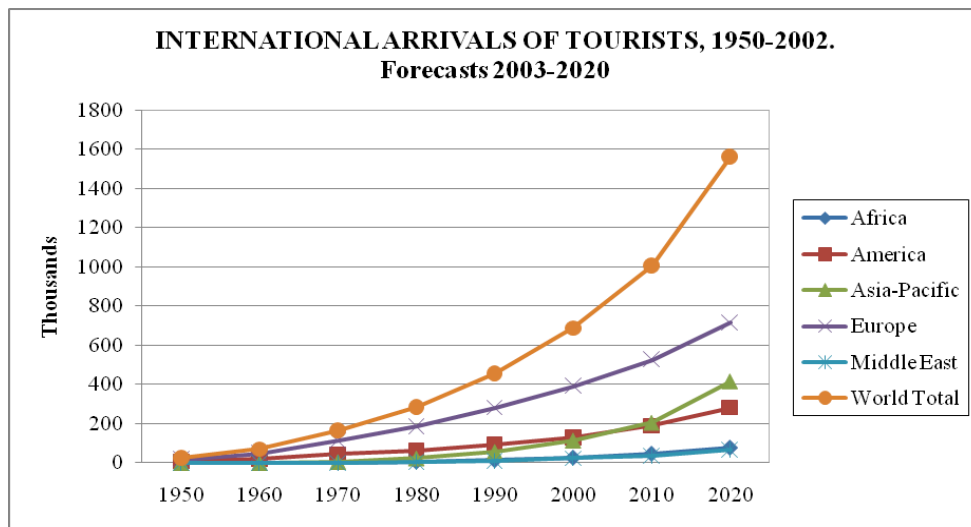
Tourism is one of the most important and dynamic economic activities of our times, with significant growth since the immediate post-war period, as shown in table 1 and the accompanying graphs. They confirm the following. Firstly, the striking increase in the number of tourists between 1950 and 2000: from 25 million to 687 million, with a clear European predominance. This –and here is the second element–, combined with the development in America, always consists of a percentage higher than 75 per cent in the worldwide attraction of tourists, an outstanding piece of data. Thirdly, the neglected destinations, Asia-Pacific, Africa and the Middle East, show delayed progress, but with a clear strength in the first of these: from 0.79 per cent in 1950 it increased to 16.77 per cent in 2000, and it can therefore be stated that, in the long term, this is the area which, relatively speaking, is attracting a greater share of tourism in the international markets. This fact infers a change in the tourism geography of the world, especially in the forthcoming years. In 2002, the ten main tourist destinations received half of the international arrivals of visitors, who accounted for more than 50 per cent of the world's tourism expenditure. Of these ten, nine are in European countries and the United States. However, a look at economic history shows a loss of strength on the part of Europe and America as destinations. In 1950, 97 per cent of the world's tourism gravitated towards those continents. In 2000, the proportion fell to 78 per cent and, according to WTO predictions, by 2020 this figure will be reduced to 64 per cent.⁶ At the other extreme are the areas of Asia and the Pacific which, as mentioned, have been playing a spectacularly more dominant role, to the tune of 27 per cent in 2020. Similar conclusions have been reached for the Middle East and Africa, which have redoubled –with further increases predicted– their roles as world tourist destinations. We can therefore see a reduction in the market share in Europe and America and a certain “peripherization” of the expansion of tourism.⁷

central idea of working in the more flexible direction of new techno-economic paradigms. See PÉREZ (2004)

⁶ A recent analysis of the periodization of world tourism in PAPANATHANAKIS (2005).

⁷ Cf. FERNÁNDEZ (1991).

Table 1. International arrivals of tourists (1950-2002) and forecasts (2003-2020)								
Large Regions	1950	1960	1970	1980	1990	2000	2010	2020
Africa	0,5	0,8	2,4	7,4	15	27,4	47	77,3
America	7,5	16,7	42,3	61,4	93	128	190,4	282,3
Asia-Pacific	0,2	0,9	6,2	24,3	57,7	115,3	205,8	416
Europe	16,8	50,4	113	186	280,6	392,7	527,3	717
Middle East	0,2	0,6	1,9	7,5	9,7	24	35,9	68,5
World Total	25,2	69,4	165,8	286,6	456	687,4	1.006,40	1.561,10
Percentages of the total								
Large Regions	1950	1960	1970	1980	1990	2000	2010	2020
Africa	1,98	1,15	1,45	2,58	3,29	3,99	4,67	4,95
America	29,76	24,06	25,51	21,42	20,39	18,62	18,92	18,08
Asia-Pacific	0,79	1,3	3,74	8,48	12,65	16,77	20,45	26,65
Europe	66,67	72,62	68,15	64,9	61,54	57,13	52,39	45,93
Middle East	0,79	0,86	1,15	2,62	2,13	3,49	3,57	4,39
World Total	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00



SOURCE: Own work based on WTO statistics.

This spectacular growth, seen from the demand side, can only be explained by the increase in income and the establishment of week-long holidays in the more developed countries. The Keynesian-type economic policies, promoted since the 1940s –in all of their variations and peculiarities- entailed a set of actions designed to stimulate added demand. In this respect, the majority of studies on tourism demand demonstrate that it is determined by income and prices.⁸ With regard to income elasticity, it is greater than one; in other words, tourism is a luxury good. Price elasticity, on the other hand, shows a more irregular behaviour: the price is a less relevant variable in the consumption of long trips, whereas for short-distance destinations this elasticity is greater. However, the historical perspective confirms that the growth in the volume of international tourists is greater than the development of the global economy: over the last fifty years, for every increase of one percentage point in the per capita income of the world's inhabitants, the increase in the number of travellers has risen by more than three points⁹.

The prediction of the world volume of tourists made by the WTO, estimating growth rates of almost 4 per cent –which would mean going from 702 million in 2002 to 1.561 billion by 2020– is supported, on the one hand, by the increase in the disposable income of citizens and, on the other, by certain socio-demographic changes occurring in the more advanced countries (a rise in the number of childless couples and single-family homes, better levels of education, the proportion of older people and the growth in the number of retired people).¹⁰ The figures shown in table 1 represent the growth in

⁸ ROSSELLÓ (2003).

⁹ During the period 1950-2001, the growth in per capita GDP was approximately 2.1 per cent and the growth in the number of tourists was around 7 per cent, with divergent trends depending on the chronology. Thus, whilst in 1950-1973 the growth in per capita income was 2.9 per cent, with an increase in the volume of tourists close to 10 per cent, the period 1973-2001 showed a growth in annual per capita GDP of 1.4 per cent. This has meant a contraction of tourism travel, which has decreased by half, since the annual increases have been in the order of 5 per cent (MADDISON, 2003; ANISI, 2005).

¹⁰ Three specific objections can be raised against these optimistic predictions: Firstly, the reduction in tourism expenditure at the destination. The tourism expenditure variable is a very difficult concept to interpret, as it is distorted by the fluctuations in the exchange rate and by the increase in the prices of tourism products. However, the direction of the trend over the last decade seems clear: the reduction in the time spent at the destination (ALEGRE-POU, 2003a). In this way, and the total tourism expenditure being understood to be the sum of the daily per capita tourism expenditure, the average stay and the number of tourists, over recent years it can be seen that the fact that there are more visitors does not mean that their expenditure increases in the same proportion. Some of the main causes for this decrease in stays are as follows: the greater frequency of international travel, which is associated with a shortening of each trip; the preference on the part of tourists for higher-quality holidays, which means sacrificing a longer stay; the existence of price effect, which could be responsible for a shortening of the time spent at the destination.

Secondly, symptoms of maturity of tourism demand in certain countries. The observation of the behaviour of outbound tourism and recent studies (GRAHAM, 2001; ALEGRE-POU, 2003a; a general view in VELLAS, 2004) point towards a possible stagnation –in outbound markets of developed countries– of the percentage of population who travel abroad. The cases of France and Great Britain illustrate this point: the increase in tourism demand is due to a greater frequency of departures per year on

an economic activity whose scarce prior experiences –what we could classify as the prehistory of mass tourism, up until the 1930s¹¹– are in clear contrast to the richer and more extensive data available from the 1940s onwards. The growth in tourism, measured by such an illustrative indicator as the number of visitors to a specific area, has experienced the most evident growth in global economic activity as a whole with the start of the post-war period.¹² And as in the case of industrialisation, a visible “*attractor*” can also be seen here –to use the expression of C. Pérez—, a geography full of natural resources to be enjoyed and not just “apprehended”, which exemplifies a whole potential for development and, in parallel, is capable of speeding up innovation and change among the pioneers who contribute to revealing and supporting the process. This becomes imitative at the point of the initial successes: unconscious talent flows, emulation grows, and the chaotic, disorganised beginnings give way to the submission to certain practical rules for operating the new activity. The turnabout is clear: national or regional economies demonstrate obvious signs in the structures of their employment markets and in the gradual contribution of the emerging activity to generating income.

Perhaps we are facing a “technological revolution” –in the sense of the technological paradigm expressed by C. Pérez- which involves a set of technologies, of products, of new – and very dynamic – industries, which are encouraging a different development in the long term. Along this line of interpretation, the fifth technological revolution (the age of IT and telecommunications) stimulates a series of factors which

the part of regular travellers. In this regard, between 1990-2002 the regions in the world which have experienced the most growth in outbound tourism were Asia and the Pacific, with 118 per cent (from 60 million to more than 131 million) and the Middle East, with 100 per cent (from 8 to 16 million tourists). Europe and America, with figures of 53 per cent and 21 per cent respectively, have increased their figures more slowly, as they have gone from 363 to 525 million. Finally, new consumer tastes (POON, 1993). This client –known as “post-Fordist”– has interests other than the crowded areas of sun and sand and this constitutes, therefore, a serious threat to mass tourism destinations. See GARAU (2010).

¹¹ There are some interesting studies analysing the early stages of the tourism phenomenon, understood to be an activity which is not eccentric, but social with a strong economic content. These beginnings have even been referred to as a “tourism revolution”. But realities such as the *Grand Tour*, aristocratic visits to spa resorts or the proliferation of the practice on the part of the social elite of bathing in the sea, cannot be included in what we understand by mass tourism. This exemplifies all of its strength as an economic alternative as from the establishment of the welfare state, extensively, among the middle and lower-middle strata of the most developed societies in Europe and America since the 1940s. In this respect, it is sensible to place the distant beginnings of the tourism phenomenon; but it cannot be inferred that this is always the central cause of a subsequent process. In this regard, see BATTILANI (2001), BOYER (1996, 2002) and CIRER (2009).

¹² The concept of the “tourist” was adopted as the foreigner in possession of official documentation – excluding the nationals in each country even if they reside abroad–, and who stays at least one night in his place of destination. With regard to the other economic sectors, it is well known that from 1945 onwards a powerful thrust in industrialisation was witnessed –with the onslaught of the fourth technological revolution–, but which had already clearly demonstrated its strength throughout the course of the three earlier technological revolutions (1771, 1829 and 1875), which led to the creation of new products, other

clearly apply to the world of mass tourism already established: the intensive use of information –with solid foundations in microelectronics–, online organisation, the importance of knowledge applied to the new activity, the proliferation of market niches which respond to changes in demand, global and instantaneous communication –via the Internet– and adaptability and national and international cooperation, in the form of clusters.¹³ The host of innovations resulting from this complex change leads in turn to other infrastructures, other products and processes. The approach to rejuvenating industries which are now mature, the different approaches to production organisation, a greater applied ability –involving increases in productivity in the first stages of the phenomenon– and, in short, the structural changes which, as a whole, constitute this economic shift, leads to an essential corollary: the adoption of new growth engines, in certain expansive areas of economic development.¹⁴

3. The Mediterranean as a tourist “attraction”

What has changed in the Mediterranean economy since 1945? And what relevant role did, and does, mass tourism perform in that transformation? These two questions are fundamental. There is an awareness of the complexity of the answer, as it is difficult to establish certain generic parameters for a very disparate geographic and economic reality, with different growths. First of all, we are talking about twenty-two genuine situations, with very important historical frameworks and with substantial political changes experienced over recent years. But an initial confirmation seems clear: on this interwoven “planet” –in the Braudel’s words– one of the great advancements has been the establishment of a service economy.

methods of production and of organising processes and the emergence of a group of countries which led –and encouraged– the entire transformation. Cf. PÉREZ (2004: 35).

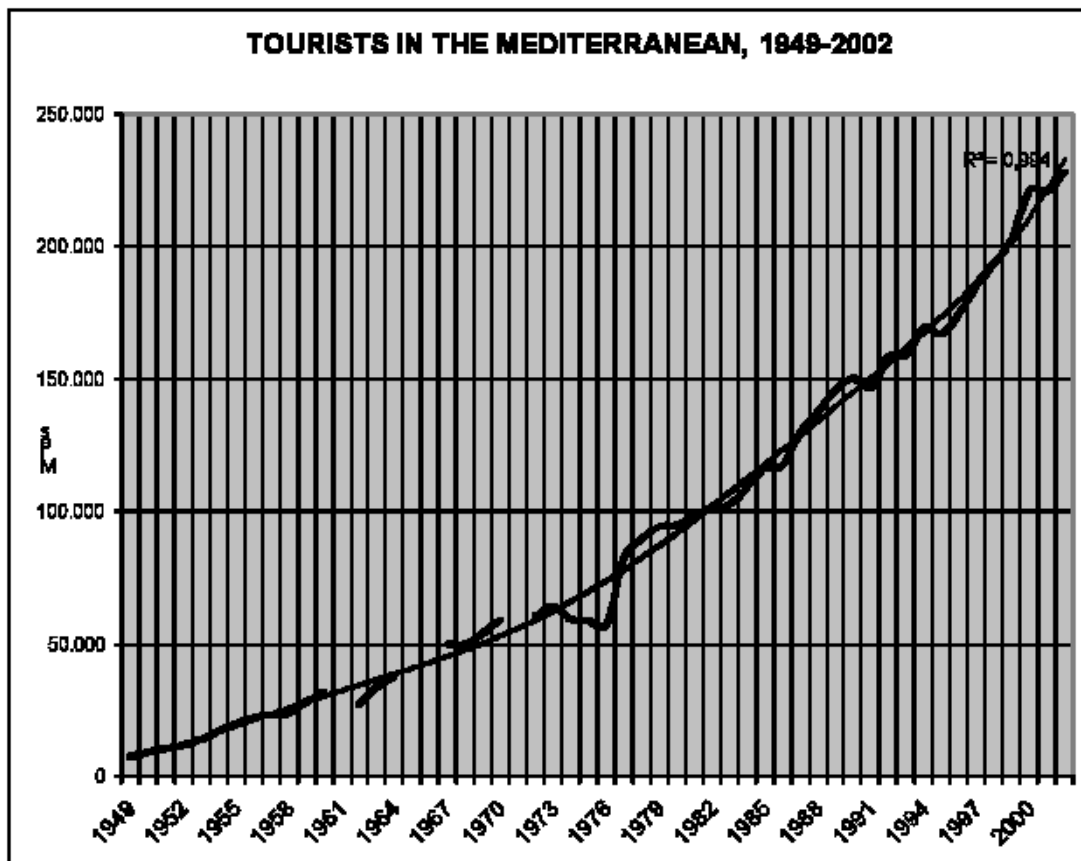
¹³ The powerful idea of inter-business cooperation is what is trying to be emphasised. The forms may vary according to the cases analysed: whether they are clusters in the strict sense expressed by M. Porter –with solid participation on the part of the universities in the “triple helix” model–, or whether they are examples which are more in line with the Marshall approaches of “districts”, the tourism activity does not fall outside of scenarios recognised in the industrial economy. From a general perspective, PÉREZ (2004: 44).

¹⁴ With regard to all of this, see PÉREZ (2004). This approach, which has been adopted in our research, does not avoid the classification of the great technological revolutions proposed by KUZNETS (1973) –with clear influences from Kondratieff and the powerful idea of an economic cycle supported by Schumpeter; neither, of course, does it fall outside of the classic theses of KUHN (1962) in relation to the central nucleus of technical change. The view defended here –and which seem acceptable in order to analyse mass tourism throughout its history– follows the thought that the technological revolution involves an explosion of new products (tourism supply), of new activities and infrastructures (associated services, hotels, apartments, large resorts), which lead to another techno-economic paradigm (the tourism economy, with all its by-products associated with quaternary and quinary activities). This represents an innovative guide for entrepreneurs, technicians, professionals, workers, consumers, investors, academics, which affects individual and collective decisions, with an intense feeling of interaction. And, as a final result, of propagation of the group of technologies explored and encouraged. Cf. PÉREZ (2004: 32-33); MANERA (2009).

The countries of the basin comprise a total of twenty-two States which share the common characteristic of bordering the *Mare Nostrum*. All of them together constitute one of the world's main destinations: with more than 702 million visitors in 2002, representing a third of the world's international tourist arrivals, and a revenue of 134 billion dollars, 28 per cent of the world's tourism expenditure. The Mediterranean bases a large part of its economic activity on this provision of services. In the same year, the impact of tourism expenditure amounted to around 3.7 per cent of the gross national product. The variety found on the Mediterranean is scarcely debateable. From the traditional sun and sand locations, such as Spain, Turkey and Tunisia, to those renowned for their culture and heritage, particularly in the cases of France and Italy, the coasts of this enclosed sea form part of an area visited, mostly, for the purpose of leisure and holidays, although, as with the world's tourism flows, other motives, such as health, professional requirements or business commitments, gradually persist and are facets which diversify destinations and the types of clients. The Europeans are the most frequent visitors –nine out of ten tourists–, whilst far behind are the Americans – less than 5 per cent of travellers– and, more recently, we have witnessed the increase in tourists from the Middle East and from South-East Asia –groups which have doubled their market share between 1990 and 2002 (from 7 to 13 million arrivals).

The historical and economic area of the Mediterranean is a huge attraction for the leisure economy.¹⁵ The figures on the arrivals of tourists to its cities, as shown in the graph, support this assertion.

¹⁵ A recent analysis of the impact of tourism in the Mediterranean from the socio-economic and cultural point of view in: APOSTOLOPOULOS-LOUKISSAS-LEONTIDOU (2001).



SOURCE: Own work based on WTO statistics. The data processed corresponds to: Albania, Algeria, Cyprus, Egypt, Spain, France, Greece, Israel, Italy, Libya, Lebanon, Malta, Morocco, Monaco, Palestine (which is not included in the collection of data as there was no complete series), Syria, Tunisia, Turkey and the following countries of the former Yugoslavia: Bosnia-Herzegovina, Croatia, Slovenia and Serbia and Montenegro (up until 1991 Yugoslavia is taken as a whole). As an exception, Macedonia was also included, although it is not a country with a Mediterranean coast, in order to standardise the data relating to the former Yugoslavia.¹⁶

As can be seen, the growth since the 1950s is impressive. The curve shown has few deviations: from 7 million tourists in 1949 to 227 million in 2002, few economic activities have multiplied one of their reference indicators by thirty-three (even during the course of the so-called “glorious” thirty-year period between 1945 and 1973).

¹⁶ The components of the former Yugoslavia deserve a special mention, as, following the disappearance of this country in 1991 and the birth of the independent republics of Bosnia-Herzegovina, Croatia, Slovenia, Macedonia and Serbia and Montenegro, a single tourist destination was divided into five different destinations. A view, in perspective, enables us to see that after the logical increase in the tourism indicators (all of them started practically from zero following the civil war), none has yet managed to exceed the levels reached by Yugoslavia in 1989. In fact, the sum, in these five new countries, of the number of arrivals of international tourists (8.9 million), of overnight stays (47 million) and also of tourist accommodation places (324,000) does not exceed the figures reached by the former Yugoslavia fifteen years ago, evaluated respectively at 9 and 52 million and 359,000 places.

4. Towards some conclusions

The observation of this half century of tourism movement enables us to make some specific comments, of a general nature:

1. Five clear phases of development can be seen: an expansive phase, between 1949 and 1972, which is common to the parallel progress made by economic activity as a whole; the next phase, of clear contraction, between 1973 and 1978, due to the economic crisis and political instability in a large group of countries (Israel, Libya, Lebanon, Syria, Tunisia, Turkey); a third phase beginning with the new thrust from 1979 to 1990, in contrast to the world's economic situation, still shaken by the impact of the war between Iran and Iraq and by the consequences of the second oil crisis; a fourth, more relevant, period, in response to the light and ephemeral contraction of 1991-1993, in which political unrest moved to the more eastern parts of the Mediterranean¹⁷; and, finally, a new period of relaunch beginning in 1994 and lasting until the beginnings of the new century.
2. The data gathered does not identify all of the sections of the life cycle of tourism, as proposed by R.W. Butler.¹⁸ This author suggests six stages in the tourism economy which are characterised by their display of different rates of growth in demand. In the first, known as the "exploration" stage, the number of tourists is low, thus resulting in hardly any changes. In the second, the "involvement" stage, the amount of visitors begins to grow at increasingly high rates to the point where it reaches its maximum in the full "development" phase, i.e., the third stage. From that point on, the number of tourists expands, albeit with less intensity, to end, shortly after, with zero growth in the period that Butler calls the "stagnation" stage. Lastly, two possibilities are clear: "rejuvenation" or "depression". WTO tourism predictions, shown in table 1, and which need to be viewed extremely cautiously, do not lead us to think that, in the Mediterranean as a whole, the maturity stage has now been established. On the contrary, in fact, the movement of tourists seems less affected by the transformations and ups and downs of the international economy than other productive sectors.

¹⁷ It cannot be forgotten that during these tumultuous years the United States current account deficit resulted in the fall in the dollar and a loss of the green bill in exchange rates in relation to European currencies. Domestic demand in North America suffered, to the subsequent detriment of the economies in Europe. In this regard, see CRAFTS (2006), who analyses the slowing down of the United States from the point of view of economic globalisation and the importance of the decisive development of new technologies in order to overcome the crisis. Complementary and useful views, as they analyse the synergies and contradictions between the "old" and "new" methods of production, with the convincing inclusion of service activities, in BRENNER (2003) and STIGLITZ (2003).

¹⁸ BUTLER (1980). The full cycle infers enormous explanatory possibilities for certain tourism economies in the Mediterranean, particularly those which have reached high levels of maturity.

However, this is very slippery ground which cannot be commented on thoroughly enough, taking into account that these forecasts and predictions may need to be reviewed.

3. Nevertheless, the status of tourism in each of the countries is different. In fact, the destinations could be classified into three main groups. Firstly, and continuing with the terminology of industrial history, the first comers, the pioneers, i.e., Spain, France and Italy; these three nations dominate Mediterranean tourism, as their market share ranges from 75 per cent to 95 per cent. This leadership is, in turn, shared worldwide with the United States and China. These destinations have a long life cycle, as they have been displaying a particular development model for several decades. Secondly, the late comers, those who are new to the process, Greece, Egypt, Turkey, Tunisia, Morocco, nations which are making progress in the achievement of their tourism objectives, but which do not manage to grasp significant market shares from the leaders due to the powerful expansion of the sector as a whole, as shown by the figures provided. These five are different from others, which have also experienced a significant increase in the number of tourists over recent years, because they display a regular and constant growth path, maintained for almost fifteen years. This leads us to consider them as nations which are emerging, yet established in the tourism economy, as their paths do not respond to particular climates. A third group consists of the remaining countries, more modest in size, which have been waking up to the tourism phenomenon relatively recently. These are destinations with erratic behaviour. They are countries (Albania, Algeria, Israel, Libya, Malta, and Monaco, among others) whose tourism variables have increased at a rate considerably below the Mediterranean average, or whose figures for arrivals, overnight stays and tourism expenditure have decreased (such as Israel). There are three fundamental reasons for the unpredictable behaviour of these destinations. Firstly, political instability, combined with the emergence of violent phenomena of a political/religious nature. This is illustrated by the cases of Algeria (where there were over one hundred thousand fatalities between 1992 and 1998 due to attacks by Islamic fundamentalists) and Israel (with the start of a new *intifada* in September 2000). Secondly, in spite of the growth in tourism in certain countries (Albania), these do not maintain it with the same intensity or for a long period of time. Finally, there are States (Malta, Monaco) which display similar characteristics to the traditional Mediterranean nations: it has been several decades since they were

significant and they have begun to show signs of decline, with growth rates of the tourism variables at lower levels than their Mediterranean rivals.

There is no clear process of the replacement of first comers by late comers, as was so evident in the Industrial Revolution. There is no changeover; moreover, the pioneers continue to progress, although, in specific examples of regional economies, reasonable signs of saturation can be seen.

From this point onwards, the work must first of all be steered in the following directions:

1. To analyse in depth the bibliographic records in relation to tourism economics and economic change.
2. To demonstrate with accurate indicators the claims that have been made: greater growth in tourism in relation to general economic growth, advancement of “tertiarisation”, among others.
3. To make use of the statistical material available, with a focus on certain key areas:
 - The diversification of European economic structures since 1945.
 - Tourism expenditure.
 - The interrelation of markets between the first comers and the late comers.
4. The regional breakdown of national figures, as the tourism phenomenon calls for more localised analysis in the spatial environment (Fujita-Krugman-Venables: new economic geography). Here, a thorough analysis of the EUROSTAT databases will be a determining factor, although the chronological limits of these materials are severe.
5. The inclusion of the innovation processes that are inherent to mass tourism within the framework of the fifth technological revolution (Pérez).

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