

# Positioning Mediterranean Tourism in the Global Market



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# Tourism has seen a tremendous change over the past years

## Tourism 1950



- ~25 million international travellers
- Mainly domestic holidays

## Tourism 2015



- ~ 1,3 billion international travellers
- Global travellers

# Fundamentally changes in customer requirements and markets

- Growth in organized market
- Decrease in non-organized market

## Core growth areas:

- Modular products
- “Do it yourself packages” (DIY)

## Two main drivers

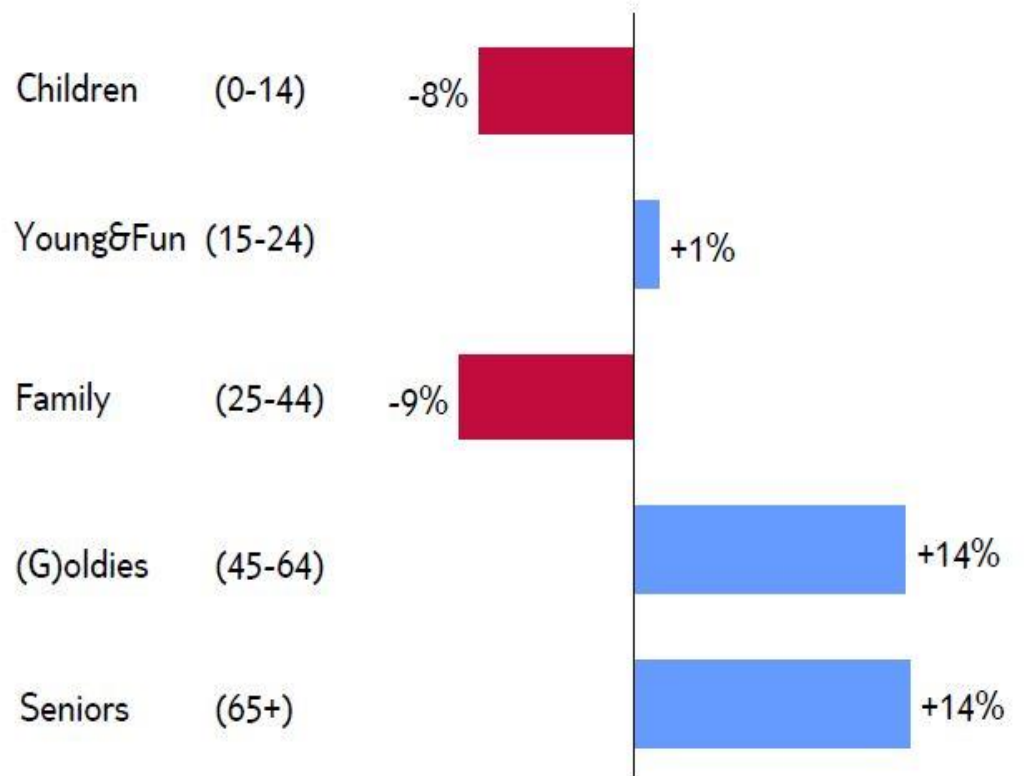
- Change in customer behaviour
- Competitive environment

# Fundamental changes in customer behaviour

## Consumer trends

- 1 Flexibility & Choice
- 2 Polarisation
- 3 Value for money
- 4 Differentiation & Specialisation
- 5 Environmental awareness

## European demography 2000-2015



# Impact of demographics

## Holiday type

## Growth potential

### Cruise

Ocean, river



### Well-being & Health



### Life experience

Round trip, soft adventure,  
activities, city trips



### Residential

Long-term stay, holiday home  
service apartments



### Sun & Beach



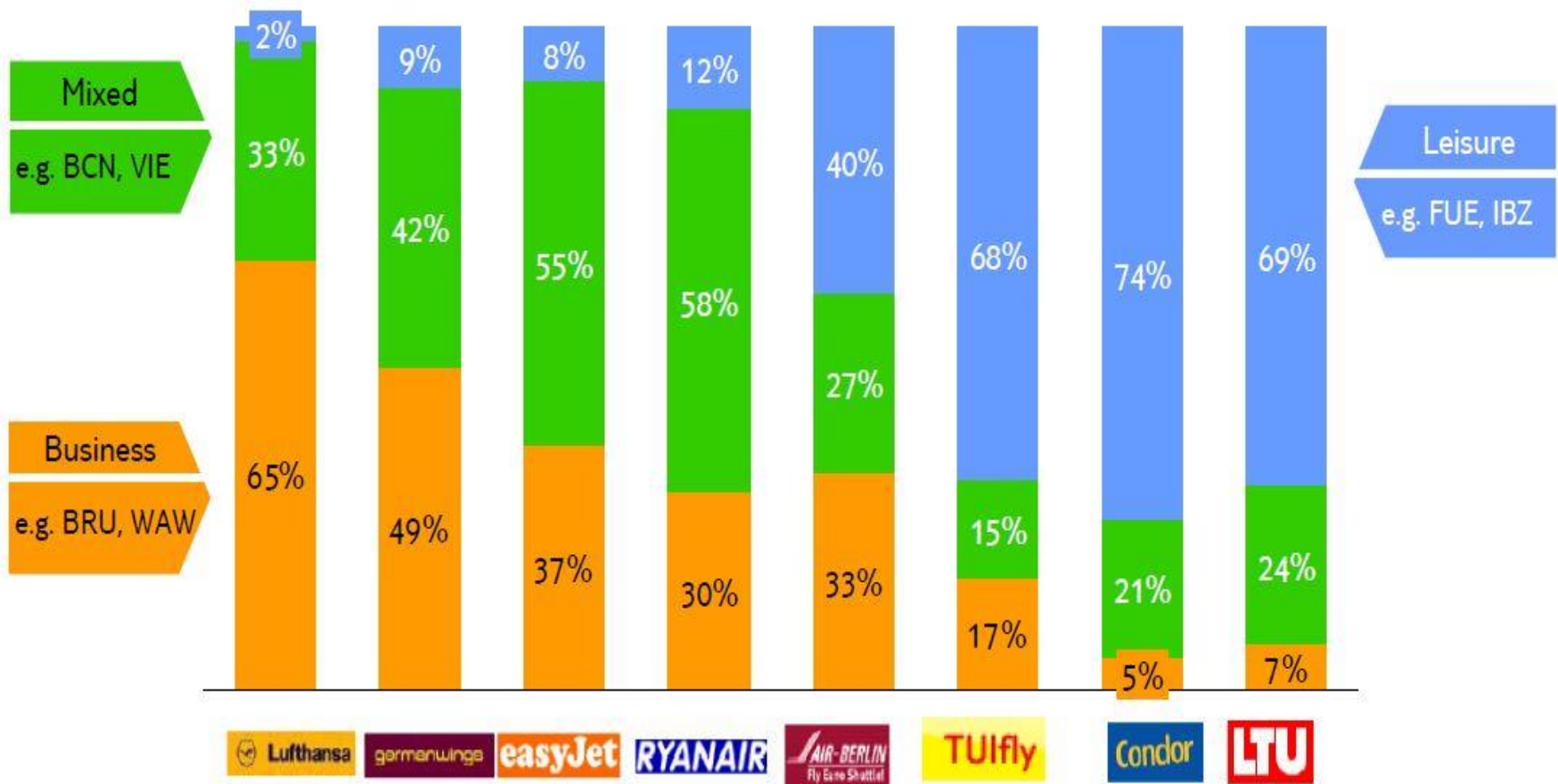
# Tourism in the digital world

- **Internet plays vital and growing role**
- **Online content primary source of travel information, exceeding all other forms of traditional media and marketing in Europe.**
- **Travel businesses connect with consumers through online marketing, social media, travel apps, search functionality, and booking platforms.**



# Competitive environment

## LCCs enter leisure destination routes



# New destinations – New concepts – New capacities

**New destinations – New concepts – New capacities**



**Hotels**



**Cruise**

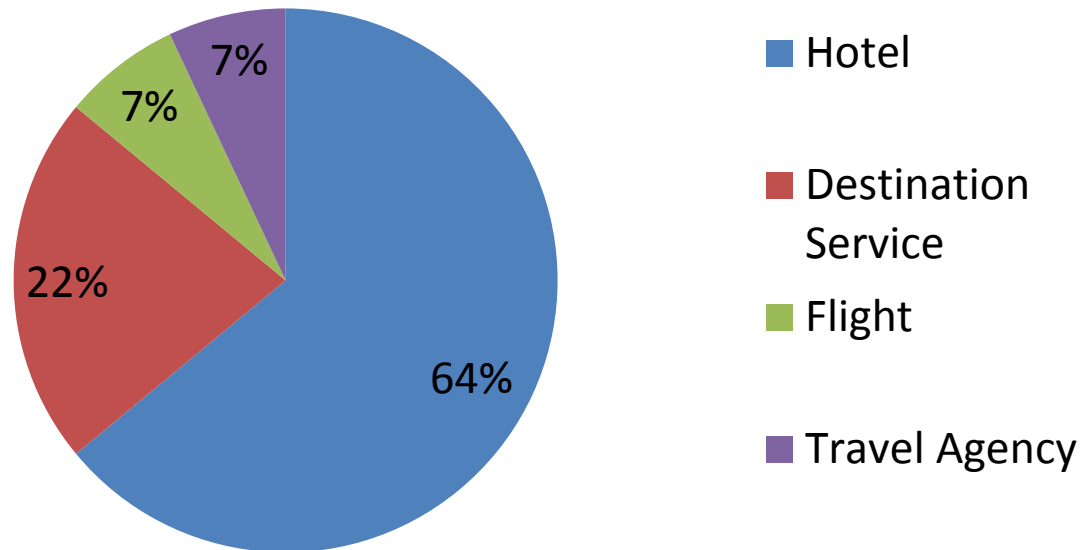


**Residential**



# Hotel with high influence on customer satisfaction

**What determines overall holiday customer satisfaction**



**Thank you for your attention**

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