

# TOURISM COMPETITIVENESS IN THE EUROPEAN UNION SMALL STATES

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LE GOUVERNEMENT  
DU GRAND-DUCHÉ DE LUXEMBOURG  
Ministère de l'Économie

Observatoire de la compétitivité



L-Università  
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**STATEC**



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LET'S MAKE IT HAPPEN

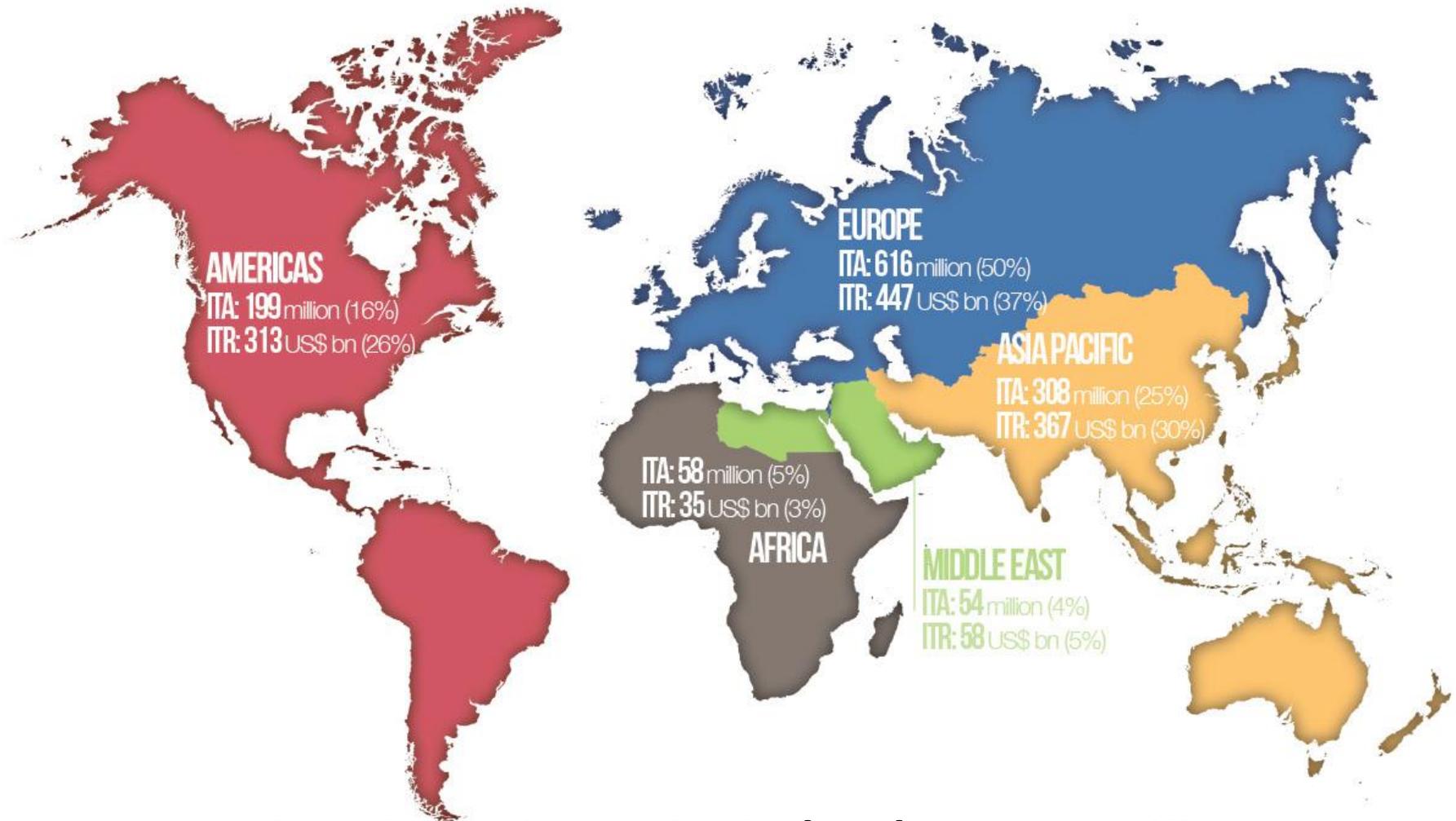
- **IS EUROPE AS A CONTINENT A MAJOR PLAYER IN INTERNATIONAL TOURISM MARKET ?**
- **IS TOURISM IMPORTANT ECONOMIC TOOL OF DEVELOPMENT IN THE EUROPEAN UNION SMALL STATES ?**
- **ARE THIS 7 (EUSS) ECONOMIES COMPETITIVE IN INTERNATIONAL TOURISM MARKET?**

# **AGENDA**

- **EUROPE IN INTERNATIONAL TOURISM**
- **TOURISM IN THE EU SMALL STATES**
- **THE TRAVEL & TOURISM  
COMPETITIVENESS INDEX**
- **COMPETITIVENESS INDEX  
IN THE EU SMALL STATES**

**EUROPE IN  
INTERNATIONAL  
TOURISM**

# INTERNATIONAL TOURISM 2016



**International tourist arrivals (ITA): 1,235 milion**

**International tourism receipts (ITR): US \$ 1,220 billion**

# WORLD'S TOP 10 TOURISM DESTINATIONS 2016

## International tourist arrivals (million)

1. **France (82.6)**
2. **United States (75.6)**
3. **Spain (75.5)**
4. **China (59.3)**
5. **Italy (52.4)**
6. **United Kingdom (35.8)**
7. **Germany (35.6)**
8. **Mexico (35.0)**
9. **Thailand (32.6)**
10. **Turkey (30.7)**

## International tourism receipts (billion)

1. **United States (205.9)**
2. **Spain (60.3)**
3. **Thailand (49.9)**
4. **China (44.4)**
5. **France (42.5)**
6. **Italy (40.2)**
7. **United Kingdom (39.6)**
8. **Germany (37.4)**
9. **Hong Kong (China) (32.9)**
10. **Australia (32.4)**

# EUROPE

## International tourist arrivals 2016

UNWTO region/subregions:	International tourist arrivals (million)	Market share (%)
<b>Europe</b>	<b>616.2</b>	<b>49.9</b>
Northern Europe	80.2	6.5
Western Europe	181.5	14.7
Central/Eastern Europe	126.0	10.2
Southern/Medit. Europe	228.5	18.5
<b>which EU-28</b>	<b>500.1</b>	<b>40.5</b>

# EUROPE

## International tourism receipts 2016

UNWTO region/subregions:	Receipts (US\$) (billion)	Market share (%)
<b>Europe</b>	<b>447.3</b>	<b>36.7</b>
Northern Europe	74.6	6.1
Western Europe	145.3	11.9
Central/Eastern Europe	52.6	4.3
Southern/Medit. Europe	174.7	14.3
<b>which EU-28</b>	<b>376.6</b>	<b>30.9</b>

**TOURISM  
IN THE  
EUROPEAN UNION  
SMALL STATES**

# The European Union Small States

- **Cyprus**
- **Estonia**
- **Latvia**
- **Lithuania**
- **Luxembourg**
- **Malta**
- **Slovenia**

Small states are those with a population of about three million persons or less

# The EU Small States from Tourism Perspective

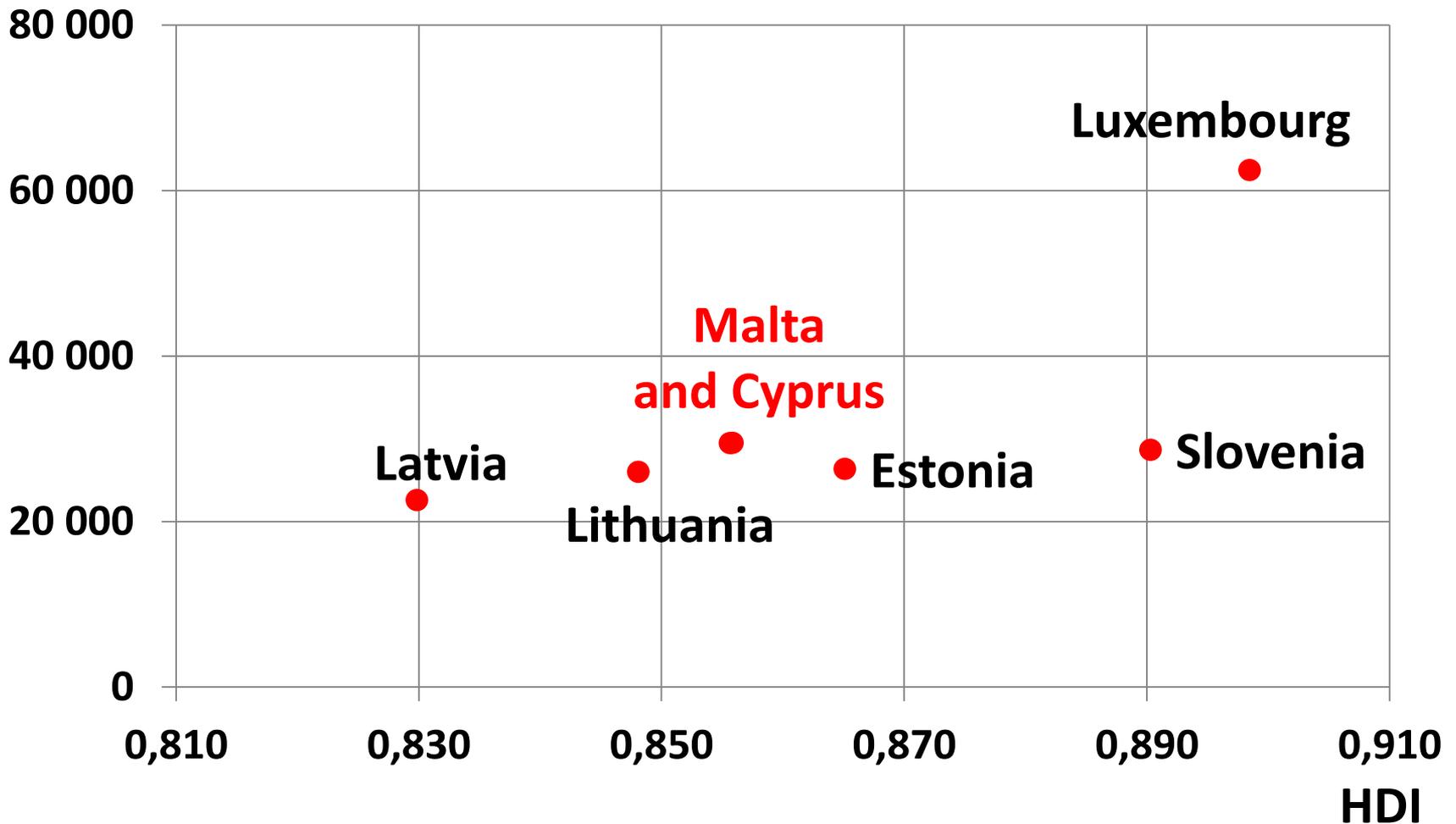
- **Luxembourg** → Western UNWTO subregion
- **Estonia** → Central/Eastern UNWTO subregion
- **Latvia** → Central/Eastern UNWTO subregion
- **Lithuania** → Central/Eastern UNWTO subregion
- **Cyprus** → Southern/Medit. UNWTO subregion
- **Malta** → Southern/Medit. UNWTO subregion
- **Slovenia** → Southern/Medit. UNWTO subregion

# International Tourism in the EU Small States in 2016

STATES	ARRIVALS		RECEIPTS	
	(milion)	MARKET SHARE (%)	(US\$ million)	MARKET SHARE (%)
Luxembourg	1,054	0.2	4,292	1.0
Estonia	3,143	0.5	1,536	0.3
Latvia	1,793	0.3	867	0.2
Lithuania	2,296	0.4	1,185	0.3
<b>Cyprus</b>	3,187	0.5	2,762	0.6
<b>Malta</b>	1,966	0.3	1,447	0.3
Slovenia	3,032	0.5	2,424	0.5

# Human Development Index (HDI) and Gross national income (GNI) per capita in the EU Small States in 2015

GNI per capita



# THE TRAVEL & TOURISM COMPETITIVENESS INDEX



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OF THE WORLD

## The Travel & Tourism Competitiveness Report 2017

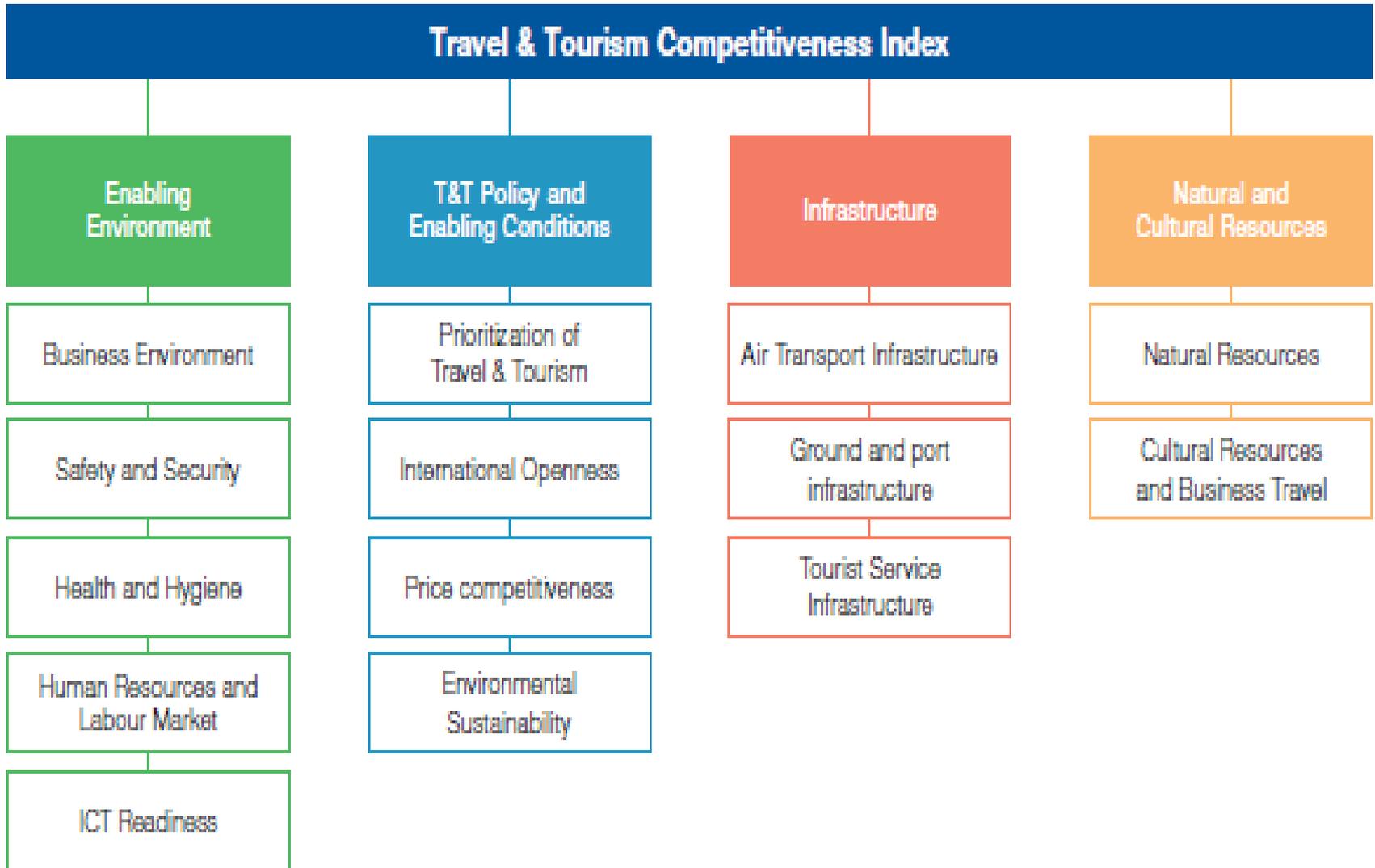
Paving the way for a more sustainable  
and inclusive future



# The Travel & Tourism Competitiveness Report 2017

**136 STATES**

# Figure 1. The T&T Competitiveness Index 2017 framework



# Top 10

Country/Economy	Rank	Score
Spain	1	5.43
France	2	5.32
Germany	3	5.28
Japan	4	5.26
United Kingdom	5	5.20
United States	6	5.12
Australia	7	5.10
Italy	8	4.99
Canada	9	4.97
Switzerland	10	4.94

# The Travel & Tourism Competitiveness Index 2017

<b>RANK</b>	<b>ECONOMY</b>	<b>SCORE</b>
<b>28</b>	<b>Luxembourg</b>	<b>4.49</b>
<b>36</b>	<b>Malta</b>	<b>4.25</b>
<b>37</b>	<b>Estonia</b>	<b>4.23</b>
<b>41</b>	<b>Slovenia</b>	<b>4.18</b>
<b>52</b>	<b>Cyprus</b>	<b>4.02</b>
<b>54</b>	<b>Latvia</b>	<b>3.97</b>
<b>56</b>	<b>Lithuania</b>	<b>3.91</b>

# Luxembourg

# 28th/136

## Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTG)

International tourist arrivals	1,089,576
International tourism Inbound receipts	US \$4,296.5 million
Average receipts per arrival	US \$3,943.3

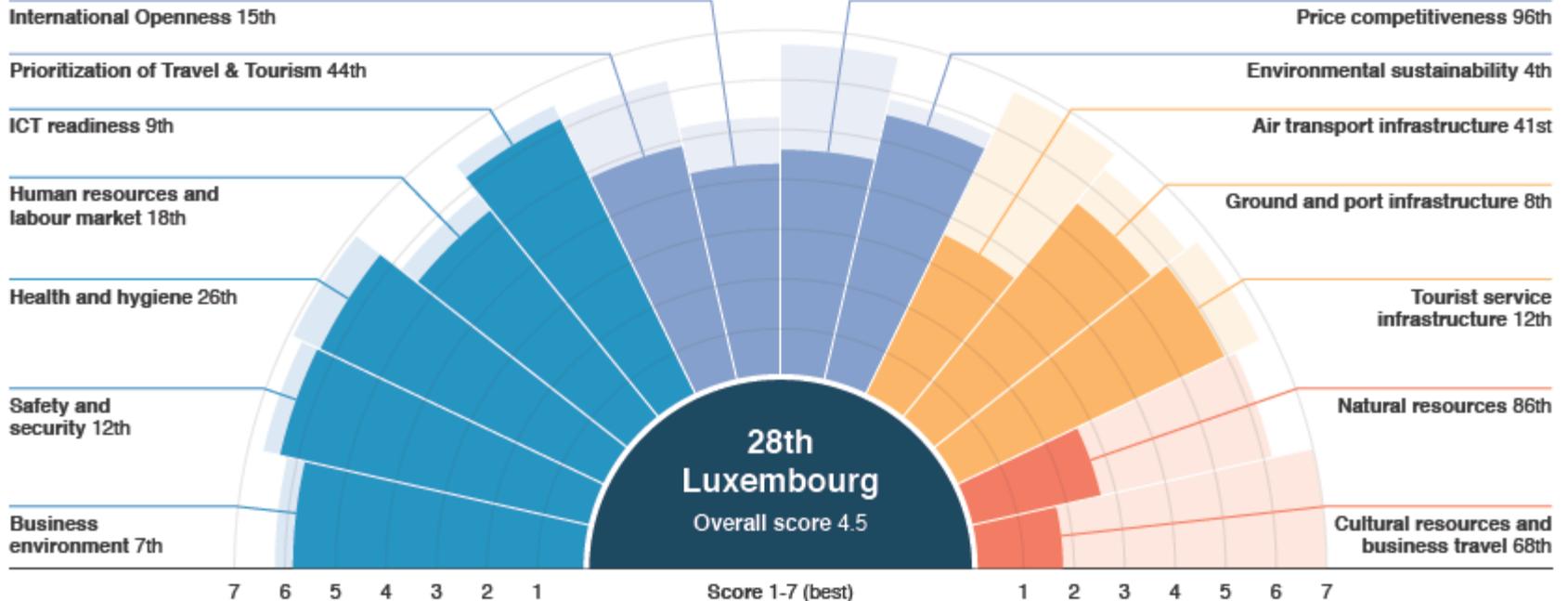
<b>T&amp;T Industry GDP</b>	<b>US \$1,030.5 million</b>
% of total	1.8%

<b>T&amp;T Industry employment</b>	<b>6,084 jobs</b>
% of total	2.5%

## Performance Overview

Pillar Rank/136

Pillar Rank/136



Source: The Travel & Tourism Competitiveness Report 2017, World Economic Forum.

# Malta

# 36th/136

## Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTG)

International tourist arrivals	1,783,366
International tourism Inbound receipts	US \$1,372.0 million
Average receipts per arrival	US \$769.3

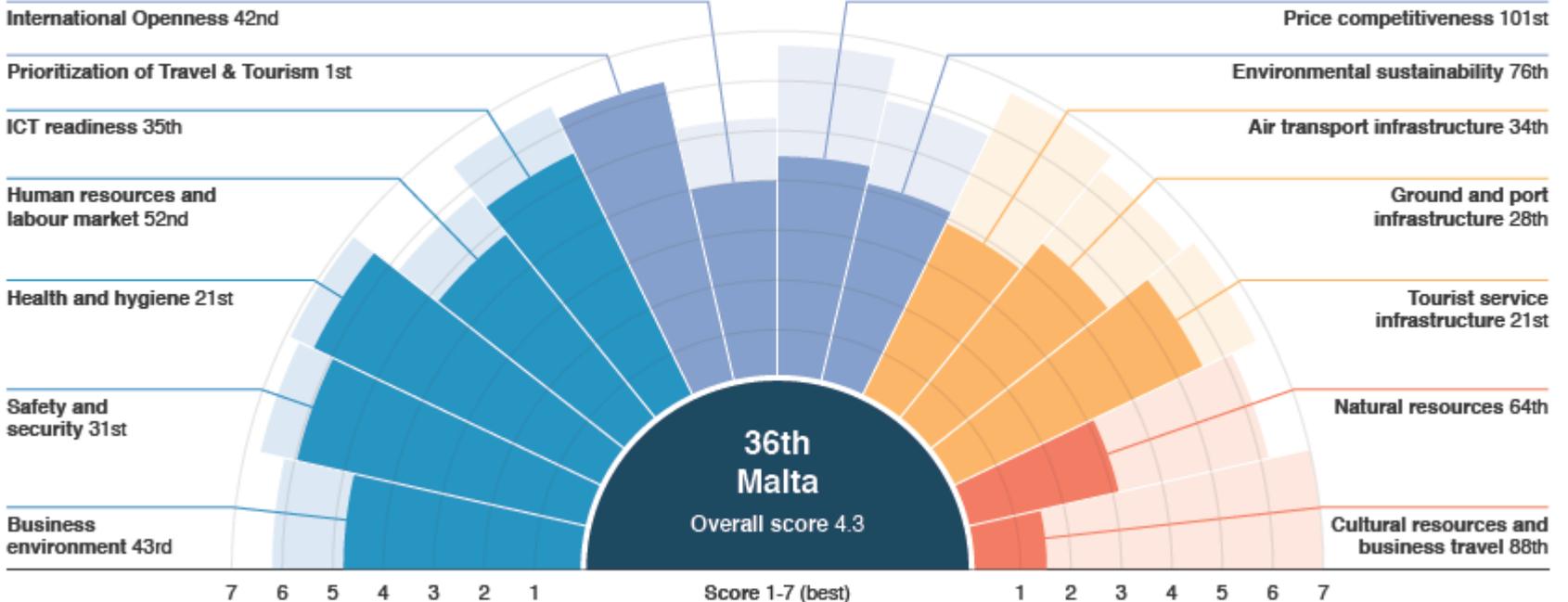
<b>T&amp;T Industry GDP</b>	<b>US \$1,397.4 million</b>
% of total	15.1%
<b>T&amp;T Industry employment</b>	<b>29,207 jobs</b>
% of total	16.5%

## Performance Overview

Key Score Highest score

Pillar Rank/136

Pillar Rank/136



# Estonia

# 37th/136

## Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

International tourist arrivals	2,988,731
International tourism Inbound receipts	US \$1,427.9 million
Average receipts per arrival	US \$477.8

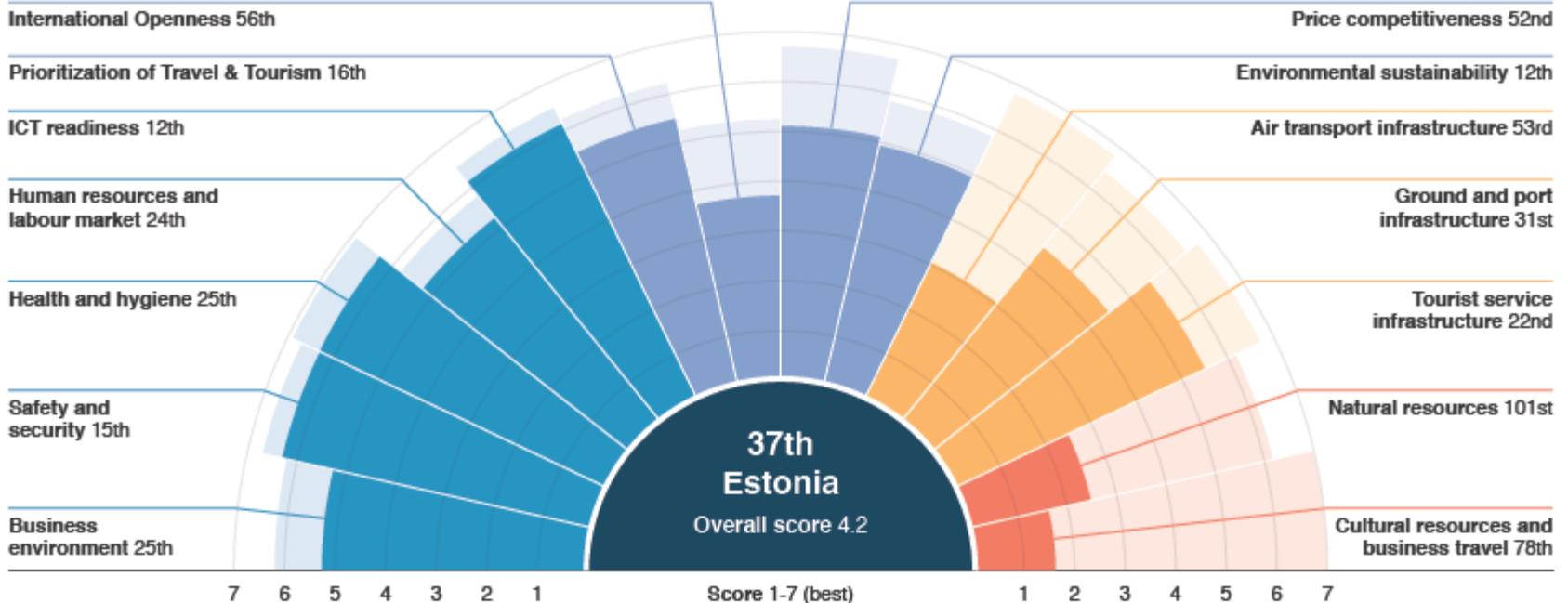
<b>T&amp;T Industry GDP</b>	<b>US \$875.2 million</b>
% of total	3.9%
<b>T&amp;T Industry employment</b>	<b>25,476 jobs</b>
% of total	4.1%

## Performance Overview

Key Score Highest score

Pillar Rank/136

Pillar Rank/136



# Slovenia

# 41th/136

## Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

International tourist arrivals	2,706,781
International tourism Inbound receipts	US \$2,504.4 million
Average receipts per arrival	US \$925.2

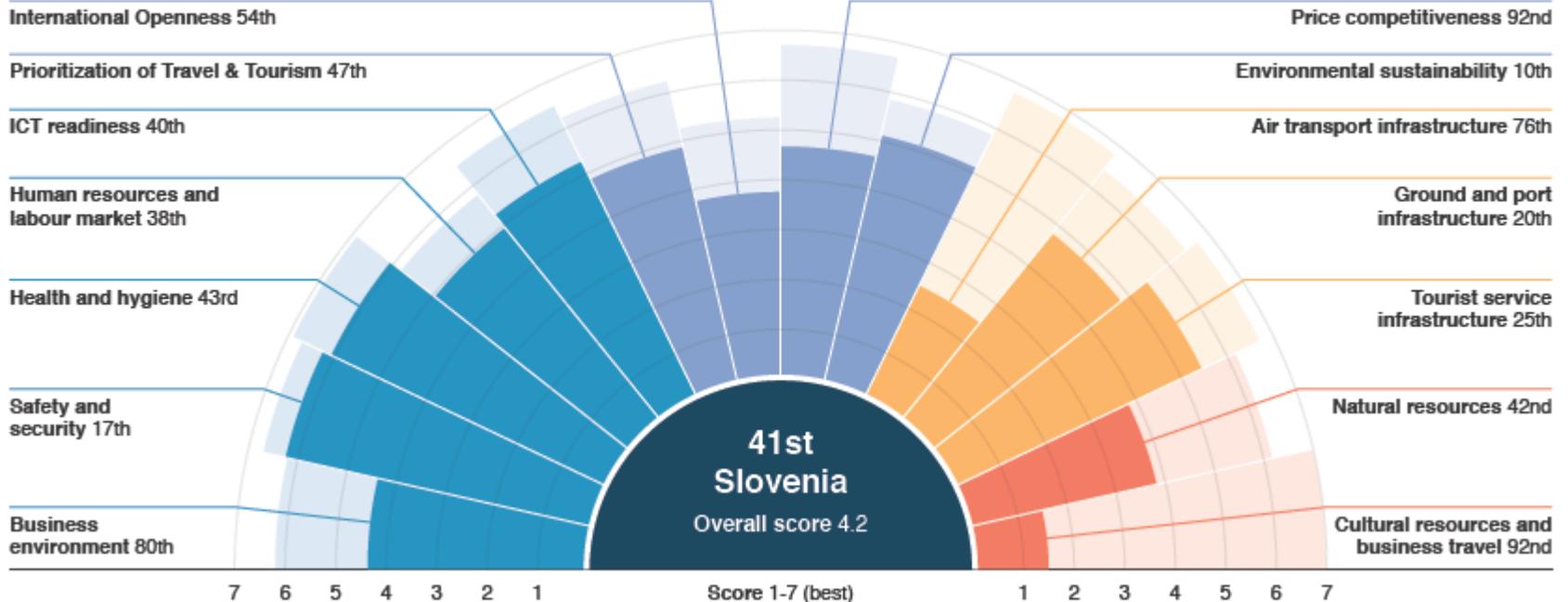
<b>T&amp;T Industry GDP</b>	<b>US \$1,509.4 million</b>
% of total	3.6%
<b>T&amp;T Industry employment</b>	<b>32,382 jobs</b>
% of total	4.0%

## Performance Overview

Key Score Highest score

Pillar Rank/136

Pillar Rank/136



# Cyprus

# 52th/136

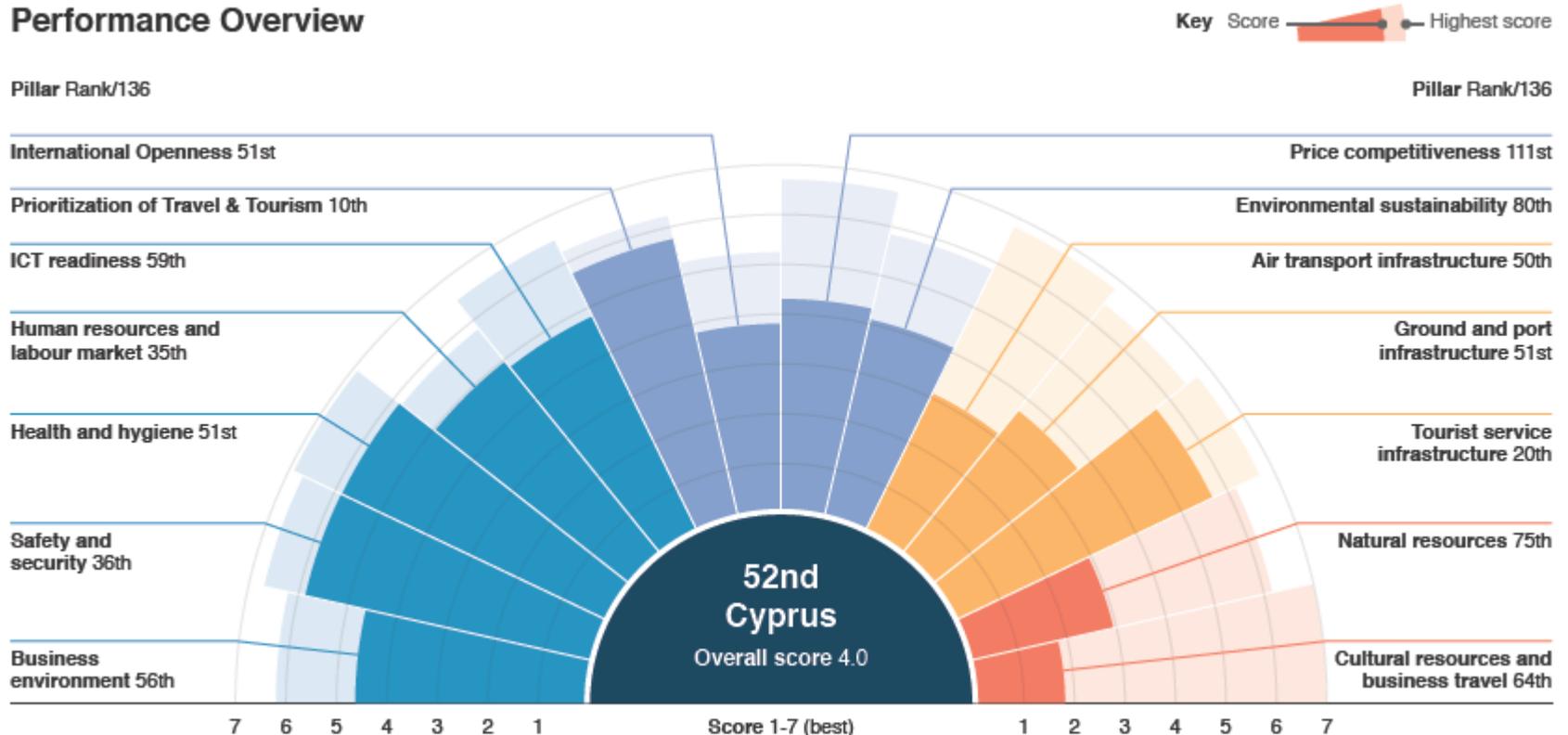
## Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTTC)

International tourist arrivals	2,659,400
International tourism Inbound receipts	US \$2,487.3 million
Average receipts per arrival	US \$935.3

T&T Industry GDP	US \$1,230.9 million
% of total	6.4%
T&T Industry employment	24,121 jobs
% of total	6.6%

## Performance Overview



# Latvia

# 54th/136

## Key Indicators

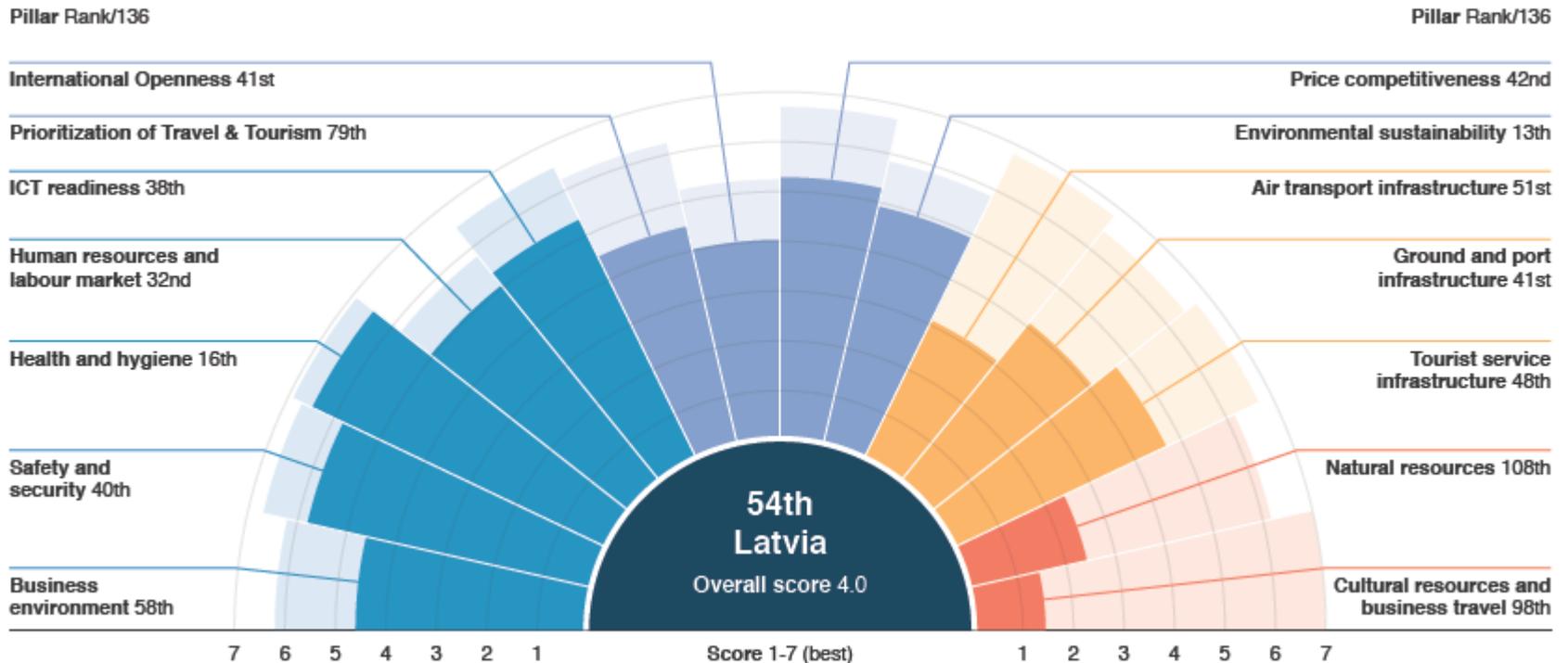
Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTTC)

International tourist arrivals	2,023,500
International tourism Inbound receipts	US \$895.6 million
Average receipts per arrival	US \$442.6

<b>T&amp;T Industry GDP</b>	<b>US \$1,116.4 million</b>
% of total	4.1%

<b>T&amp;T Industry employment</b>	<b>36,570 jobs</b>
% of total	4.1%

## Performance Overview



# Lithuania

# 56th/136

## Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTG)

International tourist arrivals	2,071,300
International tourism Inbound receipts	US \$1,154.6 million
Average receipts per arrival	US \$557.4

<b>T&amp;T Industry GDP</b>	US \$674.4 million
% of total	1.7%

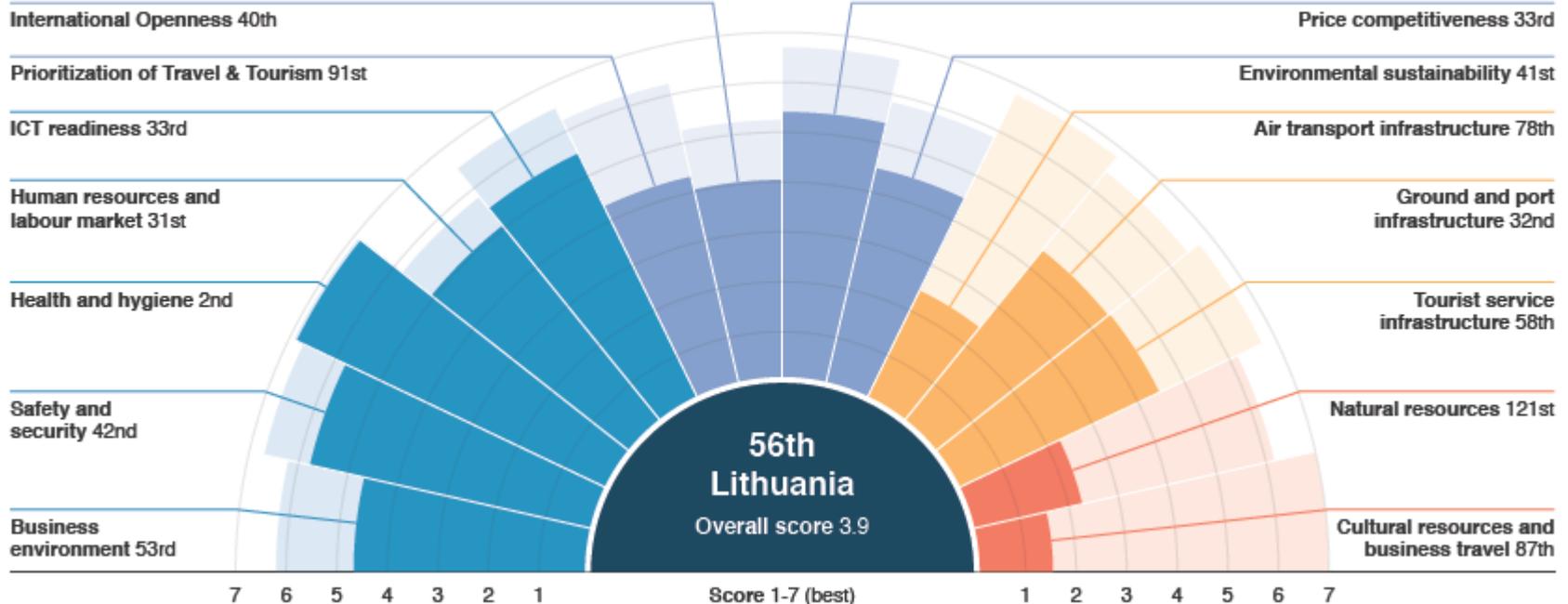
<b>T&amp;T Industry employment</b>	22,553 jobs
% of total	1.7%

## Performance Overview

Key Score  Highest score

Pillar Rank/136

Pillar Rank/136



# T@T industry GDP % of total

ECONOMY	%
Luxembourg	1.8
<b>Malta</b>	<b>15.1</b>
Estonia	3.9
Slovenia	3.6
<b>Cyprus</b>	<b>6.4</b>
Latvia	4.1
Lithuania	1.7

# Is it a SITE model ?

- **SITE MODEL (McElroy)**
- **„TOURIST COUNTRIES“  
AND „TOURISM MONOCULTURE„**
- **SMALL ISLAND STATES (SIS)  
vs SMALL ISLAND DEVELOPING STATES**

# **FINAL REMARKS**

- **IS EUROPE AS A CONTINENT A MAJOR PLAYER IN INTERNATIONAL TOURISM MARKET ?**
- **IS TOURISM IMPORTANT ECONOMIC TOOL OF DEVELOPMENT IN THE EUROPEAN UNION SMALL STATES ?**
- **ARE THIS 7 (EUSS) ECONOMIES COMPETITIVE IN INTERNATIONAL TOURISM MARKET?**

**3 x YES**