Vision 2020 for tourism in Morocco:
Raise the destination to be in the top twenty of the touristic destinations in the world
Become a model of sustainability in the Mediterranean area

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Department of Tourism, Morocco
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I. A Morocco: A rising star of international tourism

TOURISM

A powerful driver of economic growth:
An important tool for regional improvement and development, making the most of the various territories, population groups, and other assets in a sustainable way
Multiplier effects on all other sectors of the economy, an important and plays a significant part in the prosperity of the country as a hole

MOROCCO

A rich heritage of civilization, a welcoming and tolerant people, and a responsible nation committed to the values and principles of sustainable development.

Tourism: A national priority in Morocco

Vision 2010

- Moroccan tourism’s international achievement: 25th place worldwide by the end of 2010
- In the Moroccan economy: Tourism is the top of foreign exchange earner, 2nd biggest contributor to GDP and 2nd biggest creator of jobs

Vision 2020

- TO RAISE MOROCCO, BY 2020, TO BE ONE OF THE WORLD’S TOP TWENTY TOURIST DESTINATIONS AND A MODEL OF SUSTAINABILITY IN THE MEDITERRANEAN DESTINATIONS
I.B Our ambition/our objectives for 2020

1. **The aim of V 2020: Getting Morocco into the world’s top twenty destinations**

2. **The positioning of the destination**
   
   A model of tourism that combines sustainable growth and responsible custody of the environment with respect to our authentic social and cultural life.
   
   > An **innovative approach to sustainability**, based on a new generation of tourist products, long-term ecosystem management and local people’s participation in development and the benefits of tourism.

3. **To double the industry’s size by:**
   
   - Building hotel and similar accommodation amounting to **200,000 new beds**
   - **Doubling** our tourist numbers
   - **Tripling** the number of domestic travellers

   Achieving these goals will establish tourism as the country’s second biggest economic sector by:
   
   - **Creation of 470,000 jobs** created directly over the period 2011-2020 (1 million indirect)
   - Tourism’s share of GDP will **rise by 2 percentage points**
   - **Tourists takings will more than double**, and reach 140 bn DH in 2020
II. The fundamental principles of Vision 2020

Vision 2020 rests on 5 fundamental principles:

1. Building on the achievements of Vision 2010

2. Moving forward to a more integrated form of territorial improvement

3. Making the most of the country’s great variety of resources by responding to the demands of the most promising markets

4. Remediying the industry’s persistent structural weaknesses

5. Putting sustainable development at the heart of our strategy

Co-ordinating the actions of public and private partners:
V2020 has been conducted in a spirit of co-operation with the various organizations involved: private and public, national and local
III. The framework for the strategic activity

A policy of improving Morocco’s offering to tourists

A new institutional arrangement (gouvernance)

Sustainable development: A challenge but also an opportunity for tourism in Morocco to distinguish itself
III. The framework for the strategic activity

a. A policy of improving Morocco’s offering to tourists:

8 destinations, 5 main lines of development:

- Enhancing the range of cultural products
- Continuing to market the seaside resorts aggressively
- Creating a range of Nature tourism products
- Setting up themed corridors
- Setting up a potent range of events and guides
III. The framework for the strategic activity

a. A policy of improving Morocco’s offering to tourists:

**THE AZUR 2020 PROGRAMME**
To provide an internationally competitive range of seaside resorts for Morocco
Strengthen Morocco/s seaside resorts on both Atlantic and Mediterranean shores by completing the Azur projects and developing new products in the South (Souss and Sahara)

**GREEN/ECO / SUSTAINABLE DEVELOPMENT PROGRAMME**
Developing an additional green/nature range by means of innovative best-in-class sustainable development products (eco-lodges, desert resort, glampings...)

**PATRIMONY AND HERITAGE PROGRAMME:**
Enhancing the range of cultural experiences on offer by making the most of Morocco’s tangible and intangible heritage:
Developing specific accommodation, reconversion of historical monuments, building important museums, enhancing and adding value to traditional festivals

**EVENTS, SPORT & LEISURE PROGRAMME:**
Developing a range of international-class cultural and leisure events to enhance the attractiveness of our tourist destinations based on a full programme of events:
Leisure cities, thematic parks and resorts...

**HIGH VALUE ADDED NICHE PROGRAMME (BUSINESS AND WELL-BEING)**
Creating infrastructure that can host big international gatherings and by setting up synergies with sports, well-being, exhibition and culture sectors making Morocco a new international destination for well-being and health

**BILADI PROGRAMME:**
Offering a product tailored to the habits and manner of travelling of Moroccans

6 programmes for a diversified product range:
Besides the programs set up to build the offer and a wide range of products
Achieving the vision 2020 will also require to develop integrated thematic plans

Competitiveness of tourism companies

A high-quality Human Resources & Training Strategy
Upgrade the education and training system
Train 130,000 extra young people in the hotel trade
> An international grade College of Tourism and Hotel Management, model schools teaching

Marketing Strategy

Financial mechanisms
Setting up financial mechanisms to support a sustained and sustainable investment

Sustainable tourism
The establishment of special instruments for monitoring and evaluating sustainability indicators for the industry (compliance with tourist density thresholds, water consumption, the condition of the natural cultural attractions, ...) by means of regional monitoring arrangements

Strengthening the sustainability criteria in legal and regulatory standards, not least through the establishment of a green star element in the new hotel classification scheme, to distinguish model establishments and those that make particular efforts in this direction
b. The new gouvernance: A key factor in ensuring Vision 2020’s success through a strengthness of the institutional legitimacy of tourism

At the national level: creation of the high commission of tourism (public and private organizations, etc.): guide, monitor and evaluate the strategy, ensure co ordination

At the local level: Tourism Development agencies in each tourism territory to raise the territorie’s competitiveness and attractivity and provide guidance to local providers and investors.
To promote a specifically Moroccan model of sustainable tourism, 3 challenges must be met:

- Optimization of the natural/environmental resources,
- Respect the authenticity and the identity of the local populations,
- Making a fair distribution of the revenues of tourism in the whole country.
Planification

Monitoring tools

Conception

Evaluation

Investment

Promotion & Marketing

Operating

In an integrated logic, sustainability must be present in all levels of the life cycle of the tourism product.

Impact Studies
Wastewater treatment plant
Introducing environmental considerations in books of specifications (Ex: low density, limited high...)

Benchmarking,
Elaborating indicators...

Raise the awareness of actors to the importance of sustainable tourism through organizing training, seminars..., Encourage voluntary approaches, Morocco Award of Responsible Tourism...

Our ambition: Capitalize on Vision 2010 and go one stage further

IV. V2020 and sustainability
go one stage further ... by integrating sustainability early in the building of the vision

**Apprehension of saturation thresholds for each tourist site**

**Diagnostic of the level of density of tourism on the horizon of 2016**
- **Sociocultural pressure**: Nights per habitants in touristic areas
- **Land use**: Beds in commercial accommodation/km² of the site or meters of beaches /beds in commercial accommodation

**Diagnostic of environmental constraints per site**
- **Environmental constraints**: Constitution of a synthetic indice
  - Level of water availability
  - Fragility of ecosystems
  - Quality of infrastructure (energy, wastewater treatment)
  - Pollution level

**Determination of several thresholds by site**
- **Saturation point**: Maintaining capacity and arrivals per site to a sustainable level
## Analysis of opportunities for development of territories has allowed us to set a goal differential in terms of sustainability and has guided the setting of targets for growth in tourist arrivals for 2020

<table>
<thead>
<tr>
<th>Type of area</th>
<th>Description</th>
<th>Recommendation</th>
<th>List of territories</th>
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</thead>
<tbody>
<tr>
<td><strong>Fragile areas</strong></td>
<td>Strong environmental constraints and high tourist density in 2016</td>
<td>Limit the hotel development ar 2016 to limit the negative externalities on people and the environment</td>
<td>Marrakech, Essaouira, Toubkal, Rif Méditerranée</td>
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<td>by 2020</td>
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<tr>
<td><strong>Mature areas</strong></td>
<td>Environmental constraints and weak capacity by 2016</td>
<td>Restrict/spread the hotel development to avoid situations localized saturation: developing capabilities hotel on the outskirts of the sites or the new sites</td>
<td>Agadir &amp; oasis</td>
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<td>by 2020</td>
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<tr>
<td><strong>Developed areas</strong></td>
<td>Weak environmental constraints: Large room for development</td>
<td>Sustained growth in urban sites where the impact of this will be minimized to the levels of density consistent with maintaining a quality and authentic tourism experience</td>
<td>Tanger le Nord, Casablanca-Rabat-El Jadida, Fès-Meknès-Ifrane, Guelmim Tan-Tan, Ouarzazate et les Vallées du Sud</td>
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<td>by 2020</td>
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<td><strong>Preserved areas</strong></td>
<td>Strong environmental constraints and weak capacity in 2016</td>
<td>Preserve sites to make destinations windows and selective focusing on development projects for environmental excellence, quality and limited size</td>
<td>Haut Atlas Central, Dakhla</td>
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IV. V2020 and sustainability

to ensure a sustainable development in all the territories some additional strategic measures have been also planned

• Setting special tools/indicators for monitoring and evaluating sustainability

• Strengthening sustainability criteria in legal and regulatory standards (ex: creation of a green star in the new classification standards for hotels)

• Developing financial incentives for the investment in eco territories and innovative projects in terms of preservation of natural resources

• Developing a specific and adapted marketing strategy
Thank you