



DEPARTMENT OF TOURISM

DIRECTION OF REGULATION DEVELOPMENT AND QUALITY



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

Nada ROUDIES, Director for Regulation, Development and Quality
Department of Tourism, Morocco

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www.tourisme.gov.ma



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I. A Morocco: A rising star of international tourism



TOURISM

MOROCCO

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 whole

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

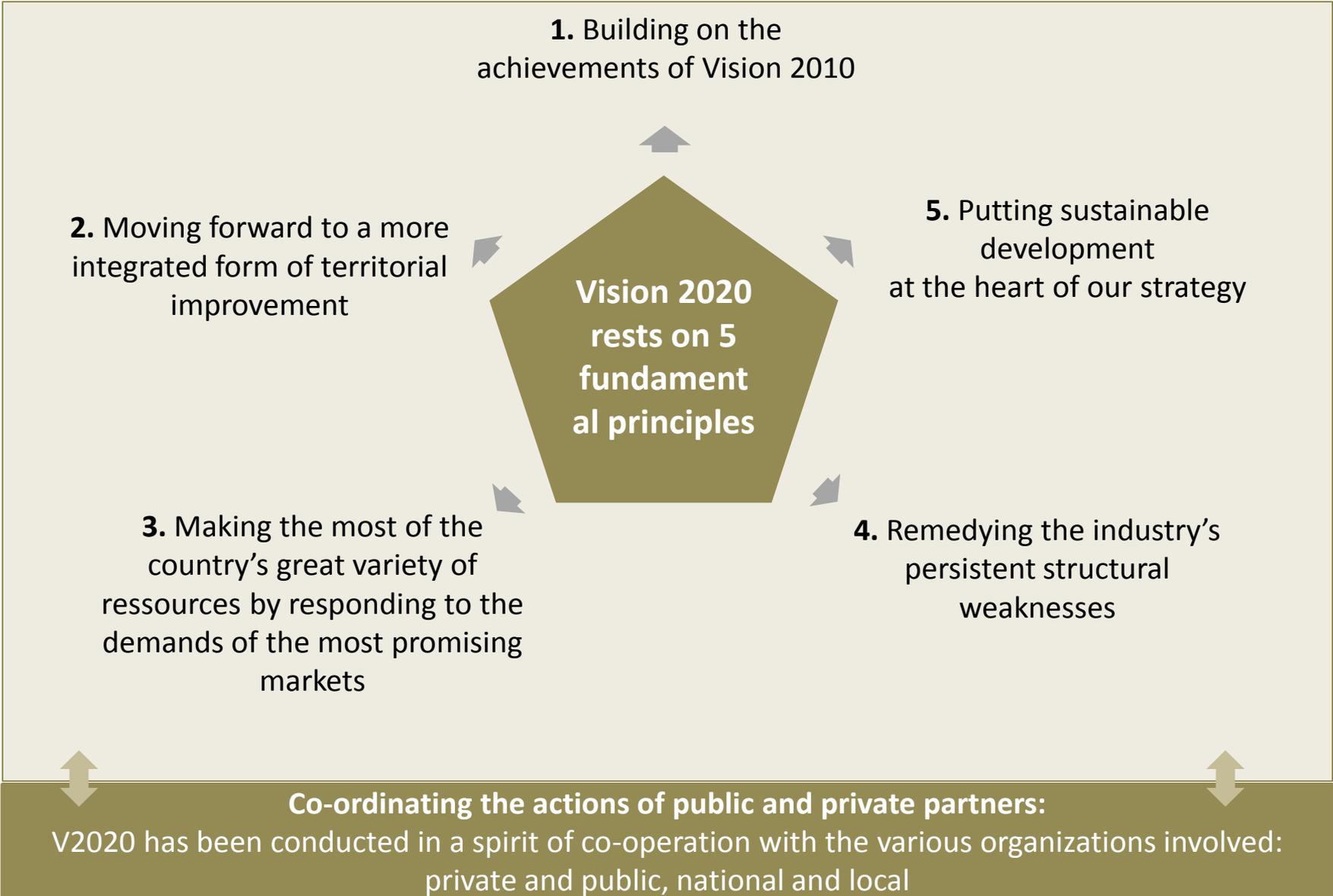
3 *To double the industry's size by:*

- 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



III. The framework for the strategic activity



a A policy of improving Morocco's offering to tourists

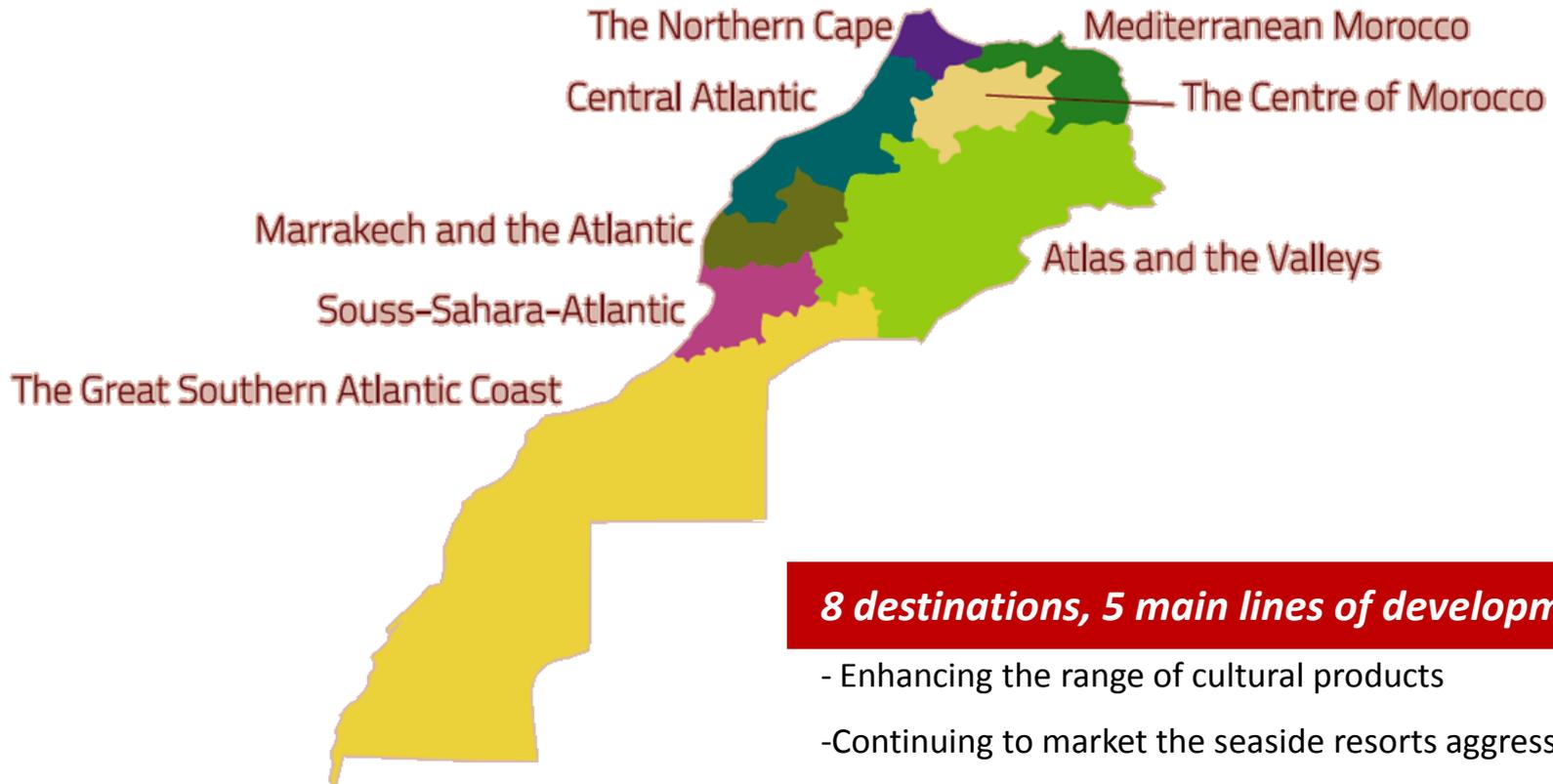
b A new institutional arrangement (gouvernance)

c 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...)

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

6 programmes for a diversified product range:

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...

BILADI PROGRAMME:

Offering a product tailored to the habits and manner of travelling of Moroccans

III. The framework for the strategic activity



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

Marketing Strategy

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

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

III. The framework for the strategic activity



b. The new governance: 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



3 main challenges must be met ...

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

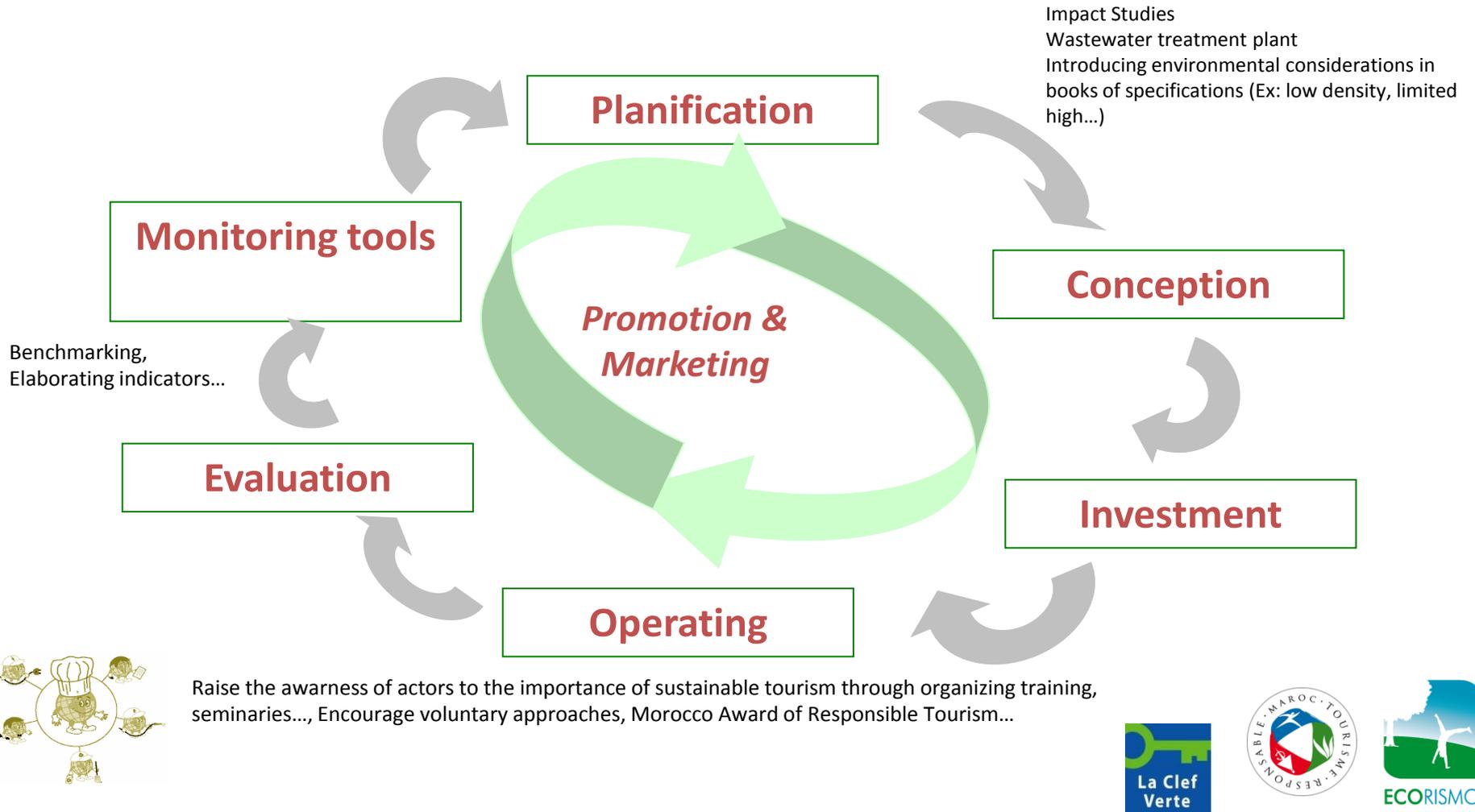


Making a fair distribution of the
revenue of tourism in the whole
country



IV. V2020 and sustainability

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



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



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 accomodation/km² of the site or meters of beaches /beds in commercial accomodation

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

IV. V2020 and sustainability



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

<i>Type of area</i>	<i>Description</i>	<i>Recommendation</i>	<i>List of territories</i>
<i>Fragile areas by 2020</i>	<ul style="list-style-type: none"> Strong environmental constraints and high tourist density in 2016 	<ul style="list-style-type: none"> Limit the hotel development ar 2016 to limit the negative externalities on people and the environment 	<ul style="list-style-type: none"> Marrakech, Essaouira, Toubkal Rif Méditerranée
<i>Mature areas by 2020</i>	<ul style="list-style-type: none"> Environmental constraints and weak capacity bu 2016 	<ul style="list-style-type: none"> Restrict/spread the hotel development to avoid situations localized saturation: developing capabilities hotel on the outskirts of the sites or the new sites 	<ul style="list-style-type: none"> Agadir & oasis
<i>Developed areas by 2020</i>	<ul style="list-style-type: none"> Weak environmental constraints: Large room for development 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> Tanger le Nord Casablanca-Rabat-El Jadida Fès-Meknès-Ifrane Guelmim Tan-Tan Ouarzazate et les Vallées du Sud
<i>Preserved areas</i>	<ul style="list-style-type: none"> Strong environmental constraints and weak capacity in 2016 	<ul style="list-style-type: none"> Preserve sites to make destinations windows and selective focusing on development projects for environmental excellence, quality and limited size 	<ul style="list-style-type: none"> Haut Atlas Central Dakhla

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



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