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**Moroccan Political Stability, an Opportunity for the
Moroccan Ministry of Tourism**

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Dedication

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I. Tourism in Morocco and Political Instability:

Knowing that the political environment in the MENA region has been favorable to Morocco, to what extent that is an opportunity to the Moroccan ministry of tourism.

According to a report done by *The Independent Traveler Journal* in 2015, many countries in the Middle East and North Africa are considered unstable and visitors were advised either to take a high degree of caution or not to visit. Morocco, on the other hand, has been described as relatively stable and fairly steady in recent years since the Arab spring demonstrations that hit the streets in 2011 and the terrorist attack on a restaurant in Marrakech (Faust, 2015)¹. So, on the one hand, Morocco is considered as an example of political stability in North Africa and the Middle East.

On a related context, some departments of foreign affairs such as the United State of America's and Canada's have warn their citizen who are travelling to Morocco to pay a high degree of caution and that their citizens might be a target to potential terrorist attacks².

Bearing in mind this dilemma, in this study, we wanted to know whether Morocco is privileged by its political stability over its competitor on the Mediterranean region or no. All the indicator say yes, if so, what is the Moroccan Ministry of Tourism strategy? And does the instability of the neighboring countries, effect the flow of tourists to Morocco?

¹ <http://www.independenttraveler.com/travel-tips/africa-and-middle-east/where-not-to-go-in-the-middle-east>

² <https://travel.state.gov/content/passports/en/country/morocco.html> (last verified on 01/05/2016)
<https://travel.gc.ca/destinations/morocco> (last verified on 01/06/2016)

Morocco is described to be modern and open to the outside world, and it also has a strategic location: it is part of the Mediterranean, Atlantic region, one of the first destinations of world tourism and is located near the largest market in the world, which is Europe. It has an exceptional seaside potential on the Mediterranean and another on the Atlantic; it is estimated to have in total 3500 km of coastline. Besides the seaside potentials, the country enjoys having other unique characteristics and landscapes (mountains, valleys and deserts); its imperial cities, medieval medinas, its world well known cuisine, its famous craftsmanship and its renowned hospitality.

With all these geographic and cultural potentials, Morocco lack of a tourism policy for a long time and the prospective of the Moroccan tourism has long been underexploited. However, during the past 20 years, tourism has recorded a modest growth, in light of industry developments in other comparable Mediterranean countries such as Tunisia and Egypt...

For a long time, tourism in Morocco suffers from structural problems (taxation, finance, etc....) which are obstacles to its development. But, having a direct impact on the other segments of the economy, the Moroccan ministry of Tourism have adopted multiple strategic to takeoff and upgrading this sector and with it all other related fields of economy in Morocco.

Our research work is to fully understand and answer the questions assuming that Morocco is politically stable comparing with its direct competitors in the Mediterranean basin, namely Tunisia, Egypt and Turkey; whether it is an opportunity for the country to seize and attract more tourists and with them more foreign currency

to the country, and what is the strategy of the Moroccan ministry of tourism under these circumstances (study of current strategy)³.

a. Moroccan Ministry of Tourism History:

Since the 60s, the international tourism in Morocco is considered by the government of tourism as a major industry. First, because it drains currency and contributes to the balance of payments, creates jobs, improves income and generates multiplied effects on the rest of the economic sectors. Then, because it is perceived as a method of reconciliation between the peoples and of maintaining peaceful relations and, economically, as an excellent insertion vector in the globalization process (Sbai, 2013)⁴.

Tourism in Morocco has experienced a slow but certainly quite satisfactory growth before it enters a period of stagnation in the late eighties to the mid ninety.

In 1995, significant measures have been taken, following a tourism development study that identified the problems and handicaps of Moroccan tourism and proposed a specific and detailed action plan.

The monitoring indicators of the development of tourism activities have shown some good results, as a result of the arrivals and the overnight stays and especially because of the earnings from foreign tourism exchange.

³ <http://www.visitmorocco.com/index.php/fre/Accueil>

⁴ <https://www.questia.com/read/1P3-2965159341/the-tourism-industry-in-the-moroccan-territory>

The year 2000 saw the arrival of nearly 4 300 000 non-residents to Morocco and 2.275 million foreign tourists, and recorded 22.3 million overnight stays, 50% in classified hotels.

Based on those motivating results, Morocco hosted the first conference of tourism in Marrakech in 2001, under the chairmanship of His Majesty the King. During this meeting, the Federation of Tourism, members of the General Confederation of Enterprises of Morocco (CGEM), and the government adopted a tourism development strategy in the form of a program contract 2001-2010, on "Tourism: a vision, a challenge, a will."

Before the French protectorate, Moroccan hotels was limited to traditional fondouks. The creation of a hotel, the example of the French hotel industry begins in Marrakech in 1921, when Marshal Lyautey, French General Resident, decided to build the luxury hotel of Mamounia. Subsequently, the French companies built other luxury hotels in major urban centers, including the Palais Jamai in Fes in 1929. In the 30s, they have created a much more modest hotels in most parts, not limited to the coastal cities but also in the Middle Atlas, and to a lesser extent in the south of the High Atlas.

After independence, Morocco made a strong diversified tourism potentials and a rich tourist traditions dating from the protectorate. The historical era inherits him a lot of touristic placements including nearly 200 hotels which in total have 7500 rooms. Since that period, Morocco gave a significant attention to tourism development.

With the performing of the 1965-1967 Three-Year Plan, Morocco has adopted a new economic policy, which articulated around three priorities: agriculture, management training and tourism.

At this point, tourism in Morocco is no longer considered a mere useful subordinate sector that only helps in the balance of payments, but as a key sector of development.

This has been obvious by the continuous and progressive development of reception facilities and by the expected economic results of various plans of successive economic and social development of Morocco.

The main stages of the Moroccan tourism Policy (Tourisme 2030: Quelle Ambition pour le Maroc?)⁵:

- 1918: creating the MNTTO
- 1960: Adoption of the Industrial Investment Code
- 1965: Creation of the Department of Tourism
- 1965-1967: Leading erecting tourism a national priority
- 1968: Creating the SONABA and SNABT
- 1973: Adoption of tourism investment code
- 1983: Adoption of a new tourism investment code
- 1995: Adoption of the Investment Charter
- 2001: Conclusion of the 2001-2010 program contract

ONMT: Moroccan National Tourist Office

SONABA: National Development Corporation of Agadir Bay

SBABT: The National Development Corporation of Bay of Tanger

b. The Tourism industry:

The Moroccan Ministry of Tourism as the name indicates operates in the travel and tourism industry. The influence of travel and tourism on the economic and social development of a country is very great. It opens new businesses, foreign investments, creating jobs, and most importantly, it protects heritage and cultural values of a country (Personal, Social and Humanities Education Section, 2013)⁶.

⁵ Report Tourisme 2030: Quelle ambition pour le Maroc

⁶ http://www.edb.gov.hk/attachment/en/curriculum-development/kla/pshe/nss-curriculum/tourism-and-hospitality-studies/Tourism_English_19_June.pdf

<https://www.wttc.org/-/media/files/reports/economic%20impact%20research/countries%202015/morocco2015.pdf>

Tourism impacts nearly all aspects of our society. Apart from its importance to economic changes, human socio-cultural activities and environmental development, tourism is related to other academic subjects such as geography, economics, history, languages, psychology, marketing, business and law, etc.

Therefore, it is necessary to include a number of subjects when studying tourism. For instance, subjects such as history and geography help us understand more about the development of the historical and geographical resources of a tourist destination. Besides, subjects like marketing and business help us understand the promotion and marketing of tourism products. The study of information technology improves our understanding of the importance of the global distribution system and its effect on tourism business. The study of religion and culture provides information on the cultural resources of a destination and opportunities to develop it as a cultural destination. Tourism is so vast, so complex, and so multifaceted that there is a wide range of subjects related to it.

Talking about the history of tourism on this paper is of great value. As the concept tourism is the one of the main terms that this research is about. The history of tourism can be divided into six different stages as follow:

1) Roman Empire Period: from about 27 BC to AD 476, traveling was restricted mainly on military, trade and political reasons, as well as for delivering and taking letters and messages from the main government to other regions. Artisans and handcrafters were also travelling to build and construct buildings, palaces and tombs. In ancient Greece, people from different regions traveled to watch or participate in the Olympic Games. Both the participants and spectators were offered accommodation and food. It is also documented that wealthy Romans, in ancient times, traveled to seaside sites in Greece and Egypt for sightseeing purposes.

2) *Middle Age Period*: from about AD 500 to 1400, during this period people from different areas were traveling for religious purposes. It had become a fundamental phenomenon for pilgrims to travel in organized trips to their visit their “holy land”. Muslims were traveling to Mecca, and Christians to Rome and Jerusalem.

3) *16th Century*: during this period there was a great growth on the trade sector in England which was the reason of the born of a different type of tourism. Travelers at this time travel to expand in their own experience and knowledge in this domain.

4) *17th Century*: In the 17th century, the aristocrats and rich people of the British Empire used to send their sons and daughters to different European destinations like Germany, Italy and France for two or three years to learn and improve their knowledge in different fields and tongues. This phenomenon was known as the Grand Tour, which was a necessary practice for the sake of preparing and training of future leaders and counselors.

5) *Industrial Revolution Period*: The Industrial Revolution period (from about 1750 to 1850) in Europe was the time which featured the creation the base for mass tourism. It was the period in which people have turned from relying on agriculture solely into moving to modern and urban way of life in which factories were the trend. As a result, there was a fast increase of the wealth and education level of the middle class, as well as a growth of leisure time and a demand for holiday tourism activities.

Meanwhile, travel for body health and body relaxation became important when the rich and fashionable Europeans began to visit spa towns such as Bath in England and Baden in Germany and seaside resorts in England such as Scarborough, Margate and Brighton.

6) *19th to 20th Centuries:* Tourism and travelers movement were greatly affected by the social and technological changes during the 19th and the 20th centuries. The scientific and technological advances during this period led to the invention of rapid and safe and to some extent cheap means of transportation. The railways were invented and later on the aircrafts as well on the 20th century. More advancements and improvements were made in communication and air transportation due to the World War II, which made travel much easier today than in earlier times.

7) *1980s:* The 1980s were called the boom years. Business and leisure travel expanded very rapidly. Travelers at this time were looking for a variety of tourism products from exciting vacation options such as adventure travel, ecotourism and luxurious travel. There was a significant expansion in the travel market and also in tourist destinations.

In 1989, the fall of the Berlin Wall in Germany signified the doom of communism in Europe. Vacation and business travelers had increased and new tourist destinations have emerged such as in Russia and the Czech Republic.

8) *1990s until now:* 1990s was known for the high operational costs the Aviation Industry was facing. These costs includes workers' wages, oil prices, fee of Central Reservation System, the landing and the advertising charges etc. During this decade, Central Reservation System also moved headed for more sophisticated technology. Now, it became possible for tourism agents to book a huge inventory of tourism products; such as hotels, car rentals, cruises, rail passes, and theatre tickets from the Central Reservation System.

The introduction of the electronic ticket brings benefits to the airlines from reducing the costs from paperwork and tickets. At the same time, passengers do not

have to worry about carrying or losing tickets. Although, electronic ticketing does not bypass the travel agents as intermediaries, but it makes it easier for the airline to deal directly with consumers.

The technological advancement also allows the airlines and other travel suppliers to sell directly to travelers through the Internet and interactive kiosks at airports. The kiosks at the airport usually sell hotel accommodation, transfer tickets such as bus tickets between airport and downtown areas.

Travelers can now log on to the Internet easily and reach for travel information, book a ticket or hotel room through their personal computer at home or through their mobile phone. There are thousands of new destinations, tour products and discounted airfares for travelers to choose from.

c. Tourism and the Political Instability:

In an era of growing political turmoil, the tourism sector is facing a significant test. Political stability and safety are prerequisites for tourism; even the mere threat of events such as civil unrest and terrorism can cause tourists to rethink their decision to visit a destination. The impact of political instability on a destination's tourism sector is both immediate and potentially long-lasting. In addition, in some circumstances, instability in one country may have an impact on the tourism sector of neighboring countries. While the road to recovery can be long and arduous, the scale of the economic benefits from tourism makes investing in Travel & Tourism (T&T) worthwhile. Emerging economies, which generally run a higher risk of political unrest, are expected to account for 57% of total tourist arrivals by 2030. In those countries, tourism has the potential to drive foreign trade, increase access to international markets, increase foreign investments, spur entrepreneurship in an industry with low

barriers to entry and spur broader economic development given the sector's strong linkages with other industries. So what measures can countries take to revamp their tourism sectors after political unrest?

Countries affected by political unrest inevitably experience a decline in the number of international tourists and in tourism receipts. No country has been able to shield its tourism sector against the impacts of insecurity. Egypt's experience over the last decade serves as a good case study. The 2005 Sharm El Sheikh attacks and 2006 attack on the city of Dahab, which left more than 23 Egyptians and tourists dead, caused a national loss of 8% of foreign tourism receipts in 2006. The Arab Spring and toppling of President Mubarak in 2011 saw tourist arrivals decline by nearly a third year-on-year, to 9.5 million from 14 million. History repeated itself two years later, when political turbulence that led to the ousting of President Morsi led to a decline in tourist arrivals from 11.5 million trips in 2012 to 9.5 million in 2013. Another example is Lebanon, where the Lebanon Israeli war in 2006 and a series of violent episodes in 2008 led to year-on-year declines in foreign tourism receipts from 17.3% to 7.2%.

Examples can be found in other regions as well: Thailand experienced a decline in tourists' confidence at the beginning of December 2008 when international airports started closing and many foreign tour agents quit the country. This led to a 3% year-on-year decrease in foreign tourist arrivals and a 12% decrease in foreign tourism receipts in 2009. The effects continued into 2010, with nearby countries benefitting from an increase in visitors. Similarly, in Ukraine, the 2008 political crisis sparked by the armed conflict between Russia and Georgia caused a year-on-year decline of around 18% in foreign tourist arrivals.

II. Supply Analysis

a. Mediterranean Tourism Market Competition Analysis

i. Competition:

The Mediterranean basin hosts several exporters of tourism. In fact, this very beautiful area, sunny almost all year, bringing together all categories of tourism, thus offering a packed tourist landscape. The multiplicity of countries providing tourists a choice and therefore advantageous proposals in terms of price and service quality. The countries of the south coast are still very tough competition; first because their market share are very close and then because they in most cases opted for tourism to develop their economies.

It could be said that competition between Morocco, Tunisia, Egypt, Turkey and Israel represent a highly competitive market which constitutes a threat to each of them; including Morocco, which has set the goal of being on the top 20 destinations in the world by 2020.

ii. Customers:

Direct customers of Morocco are the travel agencies and tour operators. Given that Morocco is a destination that is not popular with many tourists, the policy initiated by the managers of the hotels is a policy which seeks to ensure maximum nights a year to ensure the profitability of their establishments.

So those are obliged to sign agreements or contracts with tour operators or travel agencies at bargain prices to include their establishments in packaging because of the strong competition in the Mediterranean and even the side of the country Asians like Thailand or Malaysia. However regarding the direct customers of Morocco is to say, tourists, Morocco's image has been tarnished over time.

iii. Potential Entrants:

The Mediterranean region will not experience new entrants. In fact, apart from Malta and Cyprus can be especially their membership of the European Union gives them a good image and a reputation and they know that investments will further enhance their potential. These two countries thus can provide a medium-term competition. It is also likely to Algeria in the distant horizon if the situation improves but as already stated in at least 20 years. Other countries competing Morocco, but to a lesser extent: Lebanon, Israel, much less Syria.

iv. Substitutes:

The substitution is defined as the act of replacing a service, a product by one or another while keeping the same utility, the same degree of satisfaction, or even provide superior satisfaction. The tourism sector differs from other sectors in that it will not accept any substitution; in other words, there is no service that can replace Tourist Services.

v. Related Industries

There are several factors that influence the development and growth of the tourism sector. Indeed, apart from the basic factors, there are the related industries that affect all activities from far and near that area. In general, most of these activities suffer from structural handicaps namely an obsolete infrastructure, number of hotels and very small beds, transportation unsatisfactory, e-commerce ... and thereby to achieve the targets before, the Moroccan state should pursue a policy of improving and structuring activities.

b. Moroccan Tourism Market Share :

i. The International Tourism Market Share:

Talking about tourism, According to the Travel and Tourism Competitiveness report 2015, Morocco is ranked 62nd worldwide and 4th in the region. Morocco has considered tourism a strategic industry that has developed over the years. Tourism in Morocco has covered almost 8% of the country's employment, making it the highest share in the region⁷.

According to the same report, the majority of tourists who come to Morocco are attracted by its cultural and natural resources and hot spots. Morocco enjoys a relatively safe environment (37th) and an attractive business environment (10th). The infrastructure has also a great role on the development or the decline of this vital sector. Air and ground infrastructure could use some improvement. The same thing could be said about human resources which is ranked on the 107th. Staff needs to be trained and female participating needs to be increased and the market needs to be more flexible in order to attract more foreign workers. Other fields that needs also to be improved are health and hygiene. Moroccan hospitals do not have enough beds and drinking water is not accessible for everyone around the country.

ii. The Middle East and North Africa Market Share:

Table1: Middle East and North Africa Ranking:

⁷ World Economy Forum, Travel and Tourism Competitiveness Report, (2015)

Country/Economy	TTCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
MIDDLE EAST AND NORTH AFRICA							
United Arab Emirates	1	24	5.90	6.60	5.28	5.15	5.76
Qatar	2	43	6.05	6.61	5.97	5.23	5.44
Bahrain	3	60	5.53	5.33	5.17	4.71	5.76
Morocco	4	62	4.73	5.83	4.54	4.05	4.03
Saudi Arabia	5	64	5.21	5.99	5.10	4.46	5.29
Oman	6	65	5.29	6.38	5.37	4.27	4.83
Israel	7	72	4.61	4.85	6.06	4.81	5.25
Jordan	8	77	4.86	5.79	5.53	4.56	4.17
Tunisia	9	79	4.42	4.86	5.16	4.31	3.94
Egypt	10	83	4.11	3.40	5.40	4.12	3.80
Lebanon	11	94	3.76	3.81	6.04	3.99	3.62
Iran, Islamic Rep.	12	97	3.85	4.89	4.71	3.95	3.36
Kuwait	13	103	4.69	5.76	5.43	4.26	5.01
Algeria	14	123	3.78	4.90	4.97	4.04	3.09
Mauritania	15	137	3.46	5.06	3.03	2.30	2.18
Yemen	16	138	3.58	2.86	3.84	3.31	2.29
Middle East and North Africa average			4.69	5.19	5.24	4.35	4.38
Middle East and North Africa standard deviation			0.82	1.10	0.79	0.70	1.15
Best performer (global)			6.13	6.70	6.97	5.64	6.37

Note: Dark green= very strong performance, dark red = Weak performance, and yellow = average performance, compared to best/worst performances on each pillar, globally.

In relevant relation to the subject under study in this paper, it is very important to shed some light on the political factor. Political factors play a great influence on tourism development. These factors are related to government's policies in encouraging tourism activities such as investment in tourism related infrastructures, flexibility in travel visa applications and favorable foreign tourism investments. The political stability of a country in particular is a major factor. One obvious example was the clashes between the government and demonstrators in February 2011 during the Arab spring movements in Morocco. During this period, the political instability had resulted to serious negative effect on its' national tourism business. Many visitors decided to postpone and cancel their trips to Morocco which finally led to severe loss of income generated by tourism businesses.

As stated on the table above and on other similar reports, Morocco has been ranked the first tourist destination in Africa. According to this classification, Morocco hosted 10.28 million tourists in 2014, better in 2013 where he received a little over 10 million tourists since 2009. These figures were revealed by the African Development Bank (ADB) and cited by the website Huff Post.⁸

Affected by a political crisis and terrorist threat, Egypt took second place with 9.63 million tourists. The land of the pharaohs lost about 5 million since 2009.

Just behind the two Arab countries comes South Africa, which attracted over 9.5 million tourists in 2014, followed by Tunisia 6.07 million and finally Zimbabwe with 5.88 million tourists. It is worth mentioning that Tourism in Morocco has helped in job creation, and over 755.500 people are employed in this sector, which puts the country in the 4th position behind Egypt, Ethiopia and Nigeria.

c. Tourism Strategy of Morocco's Competitors:

i. The Egyptian Tourism Strategy:

In order to support the development of its tourism sector until 2022, Egyptian government has launched an ambitious strategic plan in which it is aiming at achieving 25 million tourists; an average annual growth of 5.85 % compared to 4.3% expected by WTTC⁹. This means 250 million overnights stay for an income of \$21 billion. The Egyptian Ministry of Tourism states two main pillars that involves around this optimistic strategy:

⁸ Le Maroc, première destination touristique en Afrique, (13th January 2016), Economie, retrieved from <http://www.bladi.net/maroc-tourisme-afrique,44146.html>

⁹ World Tourism and Travel Council

1. *Increasing efforts to promote Egypt as a destination:* It is about increasing the budget for tourism promotion, which has already reached \$US40 million. The responsible ministry is considering in this regard conducting a series of large-scale promotional campaigns, based on professionalism and knowhow of the marketing and public relations companies. The aim is to change the image that associate Egypt with the "archaeological culture; seaside resort" by representing it as a destination with a variety of assets and tourist products. In addition, the strategy adopted by Egypt in the promotional component, aims to bring out the advertising campaigns from the general monotonic frame, by choosing dynamic targeting campaigns where the content and messages change several times a year depending on the circumstances, seasons and also the market requirements.

2. *Strengthening relationships with major travel agencies in the world:* It is to build and strengthen cooperation with the world major tour-operators, especially in the co- marketing field, and this is through the strengthening of the State's contribution in the financing of publicity campaigns organized by tour-operators for Egypt in their countries. Cooperation between Both sides can also be realized through organizing "knowledge" trips in which the mega-tour operators in a given market are invited to delve into the capabilities of the Egyptian tourism sector.

Moreover, Egypt is gradually moving towards diversification of its tourism products and the improvement of their quality. Indeed, the country now pays much interest in sport tourism through hosting and granting Championships of international dimension. In addition, the State is very interested in health tourism and is working on complying with the international norms and standards relating to this form of Tourism and is trying to capitalize the capabilities, management and infrastructure it has. Not to mention the conferences, environmental tourism and religious tourism are among the

strategic niches covered by the Egyptian Ministry of Tourism as part of its tourism strategy.

Particular attention is given to eco-tourism which is considered a future tourism in Egypt. Thus, the country is enormously working on keeping the sustainability of its tourism. This form of tourism has become a prime target by investors, particularly in regions that are still untouched, such as Marsa Alam and Siwa Oasis. For their part, the authorities are planning to adapt the city of Sharm Al-Sheikh to the environmental standards in order to transform it into a green city within the frame work of "the lungs of the earth" initiative, launched by the World Tourism Organization (WTO).

As far as training is concerned, efforts will be extended on improving the level and skills of human resources. Indeed, the Department of Tourism continues its strategy for training camps in cooperation with Cornell University, which is one of the largest hotel training institutions in the United States. Furthermore, a center of excellence was opened in the city of 6 October for training tourism executives. The private sector also contributes by the Construction project of the first private university of hotels in Egypt, which is the result of Cooperation between the Ministry of Investment, private operators and the Lausanne hotel school in Switzerland.

ii. The Tunisian tourism strategy:

Tunisia has commissioned a study on developing a strategic vision for the tourism sector by 2016. Developed by the International consultancy Office 'Roland Berger', the study's objective is to explore new tracks to help the tourism industry to adapt to new customers' requirements. The goal is to reach the 10 million tourists per year target in 2014 (an average annual growth rate of 7.05% in comparison with 4.50% expected by WTTC), to generate revenues of 5.36 billion dinars worth (that is 3.80 billion dollars)¹³, to achieve an occupancy rate of 54.3% and reach 260 000 beds by 2014.

The study resulted in defining five main areas which are the backbone of the 2016 vision for tourism in Tunisia:

Diversifying supply and encouraging innovation: As for the diversification of tourism supply, the focus will be on developing a quality charter called "Jasmine", creating a Tunisian label 'eco-garden' and launching a nationwide competition calling for innovative projects. Broadening the range of tourist products also includes the creation of free and untaxed zones and development of new types of accommodation such as camping, guest houses and more encouragement of niche products such as Thalassotherapy, tourism conferences, golf and health tourism.

Strengthening promotional activities: Regarding promotion and marketing, strategic study recommendations include the adoption of the approach of public relations-lobbying and the creation of an international event such as a festival or sports competition that could benefit the tourism richness in Tunisia. In addition, interest will be focused to increase the budget allocated to marketing (which is currently set at around 36.90 million dollar) through the creation of a tax break (tax paid by the tourist at the Airport or included in the holiday package) or a levy on foreign exchange banks.

Reorganizing the institutional framework: Regarding the reorganization of the institutional framework of the Tunisian tourism industry, the main trails are to create a cell of projects prospective and evaluation, to launch a startup funds and technical assistance to promoters and re-establish the professional tourism training system so that it effectively meets the real needs of this sector.

Restructuring funding methods: 13 November 11th, 2010. (1 U.S. dollar was worth 1.41 Tunisian dinars). The fourth priority identified by the strategic study advocates a financial restructuring of the tourism sector, and focuses primarily on addressing the problem of indebtedness of hotel units through the promotion of advice

dimension of the National Office of Tunisian Tourism (NOTT) and banks, the training of managers and, where necessary, changing the purpose of the hotel (Converting it into a retirement home, clinic or university home ...).

Developing web-based tourism: In terms of developing "web-based" tourism, measures are being considered to rebuild the NOTT website based on three main areas (general public, intranet, extranet), and launch an "Archipelago" program to improve the referential keywords of the Tunisian tourism heritage and support the launch of commercial sites.

iii. The Turkish tourism strategy:

As part of its 2023 tourism strategy, Turkey aims to reach 40 million tourists (an average annual growth rate of 12.86% in comparison with 5.08% expected by the WTTC) and a hotel capacity of 1.5 million beds as of the year 2013. The strategy also plans to raise the tourism receipts of foreign origin to 50 billion dollars and those from domestic tourism to 20 billion, thus leading to securing an average income of 1,000 dollars per tourist. The main axes of the Tourism Strategy can be illustrated as follows:

Diversifying tourism products: Considered as a "low cost" destination for a long time, Turkey wants to attract more travelers with high incomes, while positioning on new niches of high potential. Thus, the focus will be on spa tourism, winter tourism, ecotourism, conference tourism and sports tourism.

Strengthening infrastructure: This is to solve the problem of deficit in aviation, road and Railway infrastructure to ensure access to areas with high tourism potential. Efforts therefore are focused on strengthening and modernizing the existing airport infrastructure, while allowing the construction of new airports. As for the road transportation to the main tourist areas will be fluidized and secured by the construction of new sections that will connect these regions to national motorway network. The

interconnection between the tourist areas will also be encouraged by developing a modern railway network that is adapted to traffic trains of high speed.

Programming a multitude of large-scale tourism projects: These will mainly include:

- 9 tourist and cultural areas;
- 10 tourist cities;
- 9 marinas;
- 11 ports specially equipped to welcome cruise ships.

Proposed new promotional strategies having as variables the scope and features of the target audience: In fact, four strategies are proposed:

- The promotional strategy based on targeting a single group, which targets a homogeneous public, restricted and determined with precision;
- The intensified promotion strategy, for several target groups at once;
- The indiscriminate promotion strategy, which tends to reflect the common characteristics of several targeted segments, while recognizing the differences between them;
- The overall promotional strategy, which targets all segments of a given market.

The training component: As for training is concerned, the 2023 Tourism Strategy adopts a participatory approach involving the Ministry of Tourism, universities and Private tourist operators; all working together to improve the human resources quality and develop their skills in the academic and professional realm.

III. Tourism Demand Analysis

a. The demand analysis:

The results of tourism policy, including investment incentives, have resulted in a significant increase in capacity, which amounted to approximately 215,000 beds at the end of 2000, 40% (86 140) places in camp sites, 44% in classified hotels and 16% in the unclassified hotels.

Limited to only accredited institutions required by international tourism, it must be a noted strong growth. In 1965, the capacity of graded hotels amounted to 14,708 beds. It increased by an annual average rate of:

- 2 000 beds per year for the period covered by the Code of investments of 1960;
- 2 500 beds per year for the period covered by the 1973 Code;
- 4 000 beds per year for 1985-1992 (1983 code);
- 2 000 beds per year for the years 1993 to 2000 (Investment Charter of 1995).

Thus, the capacity of accommodation facilities which had registered during the period 1965- 2000 has realized an average net growth rate of 5.5% per year.

i. International Tourism Demand:

According to the practice of recording data, international tourist arrivals in Morocco as defined by the WTO, in 2000, the number of tourists reached 4,293,240 or 0.5% of the global volume:

- 2,274,814 tourists from traditional major tourism generating countries (European countries and America);
- 180,203 cruise passengers;
- 1,650,143 Moroccans residing abroad¹⁰.

During the same period, international tourism demand, brought on Morocco (Excluding Moroccans living abroad, temporary visit to the country and cruise

¹⁰ Source: DCP, DCP, "Tourism 2000", Tourism Department

passengers) increased significantly: it rose from 370,000 entries in 1964 to 2,274,814 in 2000, an average annual growth rate of 5%.

The progress was very encouraging to the year of 1973 when the number of tourist arrivals reached 1,226,000, marking a growth from 1964 to 1973 of 14.2% a year. In 1974, the volume of inflows fell to attach to 1 052 000. It hovered around this figure until 1981, which marked the beginning of recovery. Throughout the period 1974-1987, progress has been very slow: 2% for the years 1974-1981 and 4% for the years 1982-1987.

It was not until 1987 that the volume of tourism grew strongly, 24% per year, with the arrival of a large influx of Algerian border, with little impact on overnight stays hotel, but very important by its ripple effects on business activities Oriental. This flow declined in 1993.

Aside from the Algerian customers (of around 7000 entries in 1987, 1,453,000 in 1990 and only 15,706 in 1998 after the closure of land borders and the establishment of visas), the essentially European and American tourist arrivals have known a stage of stagnation. They hovered in a range from 1 300 000 1 700 000 entries by year throughout 1985-1998. The relative stagnation of tourist flows is attested by that of nights sold to foreign tourists in approved hotels that are past from 7,954,740 in 1985 to 9,700,909 in 1998, an annual increase of 1.5%, although short of the additional offer commissioning each year.

ii. Domestic tourism:

National tourism demand is partially apprehended through the overnight stays in tourist accommodation establishments recognized by the State. The analysis of their statistics evolution shows that from 1978 to 1994, they increased only 2.2% per year. The share of overnight stays of domestic tourism in the categories of accommodation is classified with around 20% of total nights.

Without statistics, it is not possible to disaggregate nights by domestic tourism type of tourism. However, a rough idea shows the importance of coastal destinations (67% of tourist trips in 1985).

The number of residents registered arrivals in market tourist accommodation totaled 2,105,305 in 2000, 51% in classified hotels, 26% in hotels not classified and 23% in camp sites. Moreover, the departure rate of Moroccans on holidays is between 30% and 40% in 1993. Thus, Morocco in the early 90s is in the situation of some European countries in the 60 (40% in Belgium in 1959, 37% in Germany in 1965, 45% in France in 1966).

b. Research Analysis:

To answer some of the questions that are related to the topic under study and to evaluate to what extent tourists in Morocco are satisfied with what Moroccan ministry of tourism and its agencies are offering, we relied in two main research tools. The first tool is a questionnaire that was addressed to 36 members of a diverse group of international tourists. The second tool that we relied on is the interview that was meant to be done with a member of the Moroccan ministry of tourism.

i. Questionnaire:

1. How would you rate the quality of the touristic sites you visited?

- Very high quality
- High quality
- Neither high nor low quality
- Low quality
- Very low quality

2. How convenient it is to travel in Morocco?

- Extremely convenient
- Very convenient
- Moderately convenient
- Slightly convenient
- Not at all convenient
- Other (please specify)

3. Compared to Egypt, Tunisia or Turkey if you have been there, is our service quality better, worse, or about the same?

- A great deal better
- Quite a bit better
- Somewhat better
- About the same
- Somewhat worse
- Quite a bit worse
- A great deal worse
- Don't know

4. Concerning the trips you made in Morocco, do you think the prices are too high, too low, or about right?

- A great deal too high
- Quite a bit too high
- Somewhat too high
- About right
- Somewhat too low
- Quite a bit too low
- A great deal too low

5. Overall, how satisfied or dissatisfied are you with your trips in Morocco?

- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied

- Somewhat dissatisfied
- Very dissatisfied

6. How likely is it that you would recommend visiting Morocco to a friend or colleague?

Not at all likely

Extremely likely

<input type="radio"/> Not at all likely - 0	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7	<input type="radio"/> 8	<input type="radio"/> 9	<input type="radio"/> Extremely likely - 10
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7. What changes would Moroccan ministry of tourism have to make for you to give it a higher rating?

8. Are you male or female?

- Male
- Female

9. What is your age?

- 17 or younger
- 18-20
- 21-29
- 30-39
- 40-49
- 50-59
- 60 or older

10. Which of the following categories best describes your employment status?

- Employed, working full-time
- Employed, working part-time
- Not employed, looking for work
- Not employed, NOT looking for work
- Retired

- Disabled, not able to work
- Student

ii. The interview:

In multiple occasions, I tried to reach the Moroccan Ministry of Tourism for an interview but I got no response. Through my supervisor, I managed to contact and send my questions to one of the close staff to the minister of Tourism Mr. Haddad Lahcen, but I got no response. The questions that I was intending to ask the Moroccan ministry of tourism at the interview are:

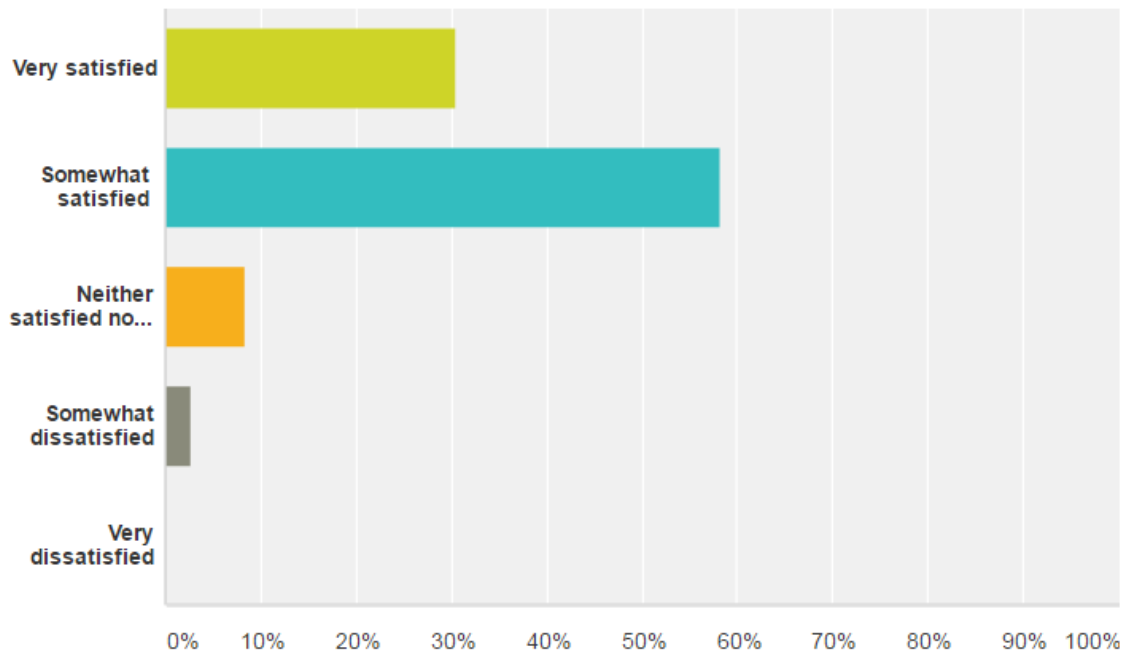
- 1. Can we say that Moroccan tourism is privileged by Morocco's political stability over its competitors on the Mediterranean region or no?*
- 2. According to your answer to the first question, what is the Moroccan Ministry of Tourism strategy under these circumstances?*
- 3. Does the recent instability of the neighboring countries (Egypt, Tunisia and Turkey), effect the flow of tourists to Morocco? If yes, how? If no, how?*

iii. Satisfaction Analysis

According the questionnaire that I have distributed to a group of international tourists about whether they are satisfied or dissatisfied about their trips that they have done in Morocco, the majority said they are somewhat satisfied as the chart below shows.



Overall, how satisfied or dissatisfied are you with your trips in Morocco?

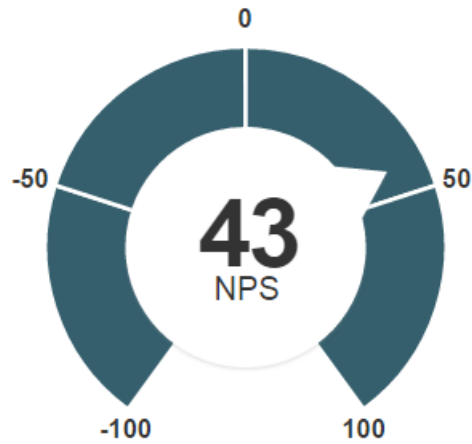


58% of the respondents are satisfied with their trips in Morocco and 30% are very satisfied and only less 3% are somewhat dissatisfied. This indicates that, the services offered, touristic agents and the touristic sites Morocco has to offer are attractive and responds to tourists' needs and expectations.

Another question (number 6) that was asked in the questionnaire to evaluate the level of satisfaction of tourists in Morocco is how likely it is you would recommend visiting Morocco to a friend or a colleague. The respondents are ask to answer this question by choosing a number in a scale from 0 (Not at all likely) to 10 (extremely likely). After the analysis of the answers, more than 54% of our respondents are considered as promoters of tourism of Morocco as the diagram below shows.



How likely is it that you would recommend visiting Morocco to a friend or colleague?



Detractors (0-6)	Passives (7-8)	Promoters (9-10)	Net Promoter® Score
11%	34%	54%	43

iv. Expectations:

In order to know the tourists expectations from the Moroccan Ministry of Tourism, a question has been asked on this regard. The question was “What changes would Moroccan ministry of tourism have to make for you to give it a higher rating?”

The respondents’ answers varies, but there are many that are repetitive, which mean that it an issue and needs to be dealt with immediately. Some of these repetitive answers has to with the issue of street harassment against females as stated below by many respondents:

Respondent 1: “Must stop harassment of women and enforce the law that taxis should use their meters everywhere (even the airport and other tourist sites!”

Respondent 2: “Make it safer from crime and harassment”

Respondent 3: “...to make it easier for women to travel without being constantly harassed by men trying to get them to go to their restaurant, shop or worse still making very rude ill-mannered sexual comments to Western women. Educating people on how to appropriately interact with women and that Western women are not like the way we are portrayed in films. Also, for Western women in relationships with Moroccan men to be able to walk down the street together, travel together without so called 'tourist police' trying to protect them. They are never around when you need to be protected from uneducated men making filthy sexual comments or following you down the street.

Other tourist expectations has to do the infrastructure of some touristic sites or the infrastructure of roads that lead to some touristic sites. Others concerns, fighting against fraud guides and taxi drivers and shopkeepers that steal tourists' money.

iii. Recommendations

As recommendations, I cannot express for them better than what my respondents'. Therefore, besides its relative political stability, and in order to attract more tourists to reach the 2030 goal of being among the top 20 destination in the world, my recommendations to the Moroccan ministry of tourism are the respondents' answers as follows:

- “Access for handicaps”
- “The amenities and most hotels are low. There may not be good wifi, service, food, etc. The Moroccan food is wonderful but finding something different is very

difficult. I would also like it if we didn't have to deal with the people who follow you around wanting you to buy something. It is very annoying and doesn't give a good impression of the real Moroccan. When traveling on the train it would be nice to have a map of the stops. Sometimes it is hard to understand what is being said on the announcement and having an understanding of which stops are coming up in your trip would be very helpful”.

- “Work on the sector with awaken hearts”
- “Transportation. Hotels/accommodation improvements. Guides needs to have a fixed prices for locals and tourists as well”.
- “Better infrastructure and strict rules to maintain the touristic sites”.
- “Some historical sites need to be better preserved. Harassment is problematic”.
- “Dishonest tourist shops are a source of frustration”.
- “Reconstruct houses buildings and some areas”.
- “Street harassment”
- “Improve the train service, Levels of petty crime are too high. Run a campaign to help Moroccan men not to be so offensive and intimidating to women”.
- “In some cities taxi drivers refuse to use the meter and ask rates that are way too high. Furthermore, the hustlers in the streets that refuse to leave you alone and insist walking with you in order to demand money afterwards as a reward for their services”.
- “English signs, clean up the trash, men need to be respectful”.
- “Protect historical and world heritage sites better”.
- “Roads to some touristic places. Hygiene facilities at sites and Fight fraud guides”
- “Keep your sites a bit cleaner”.

IV. Moroccan Tourism Environmental factors

It is been confirmed that there is fall in tourism in Tunisia as in other Mediterranean countries. The Central Bank of Tunisia said that March 31, 2016 revenues from tourism during the first two months of the year were 54% drop compared to the same period of 2015. This drop in tourism, especially related to the 2015 attacks in Bardo and Sousse, also hits other Mediterranean countries such as Egypt, Morocco or Turkey.

Tourism is a good indicator of geopolitical tensions. Tunisia, which has experienced two bloody attacks in 2015 (Bardo Museum and the Sousse Beach). While tourism was an important part of its economy, the sector is now almost a complete failure.

Tunisia:

According to official figures, the fall is brutal. Tourism in early 2016 was 54% down compared to the same period in 2015. During the 2009-2010 season, Tunisia "*attracted 900,000 tourists per year*, stated by the French chief of tour-operators, Marc Rene Chikli, quoted by *Le Monde*, *last season they were only 200,000.*"¹¹

Egypt:

Same causes, same effects. In 2015, tourism revenues fell 15% from the previous year, according to official statistics. The number of visitors had dropped by almost 15 million in 2010 to 9,300,000 five years later. The attacks in the Sinai Peninsula (attack against a Russian aircraft¹², in particular) and the unstable political situation, despite or because of the coup of Marshal Sissi, is not encouraging to visit the land of the pharaohs. For the chief of French tour operators, "*It is done!*" The 300,000 tourists of yesteryear are no more than ten thousand at the Pyramids, he says.

Turkey:

¹¹ <http://geopolis.francetvinfo.fr/sousse-la-tunisie-touchee-au-coeur-de-son-activite-economique-le-tourisme-67591>

¹² <http://geopolis.francetvinfo.fr/pour-son-tourisme-legypte-ne-veut-pas-entendre-parler-dattentat-85507>



Police officers work at the scene of the attack in Ankara March 14 2016 © REUTERS - Umit Bektas

The number of foreigners in Turkey in February 2016 fell by 10.32% compared to the same period in 2015, announced in late March this year by the Ministry of Culture and Tourism. This decline may be explained by more than the recent attacks. Russian tourists have largely deserted the country since the destruction of a Russian bomber by Turkish fighter along the Syrian border in November. Moscow had then strongly recommended its citizens to shun their favorite resorts in southern Turkey.

V. Competitive advantages

a. The Actual Competitive Advantage of the Moroccan Tourism

Among the actual competitive advantage of Moroccan tourism is its political stability.

"The Moroccan tourism owes its success to the stability of the Kingdom and its sustained development policy," Lahcen Haddad, Minister of Tourism

The positive results achieved by the Moroccan tourism sector in recent years, in context of international economics crisis and regional instability, are to credited to

stability enjoyed by the Kingdom and the sector development strategy, said Tourism Minister Lehcen Haddad.

"The stability enjoyed by Morocco remains one of the main factors behind the good performance of the sector," said Haddad in an interview with Casa Arabe de Espana¹³.

The Kingdom has been able to take shelter from the wave of protests that swept the Arab region in 2011 through the implementation of a peaceful and consensual manner, a constitutional reform program, he said, stressing that stability, which Morocco has always enjoyed political, social and economic, form a solid basis for the development of tourism.

The official, in this context, stressed the importance of the implementation strategy for the development of the tourism sector, mobilizing all stakeholders in order to enhance the attractiveness of Morocco as a destination on the international market.

All these factors have enabled Morocco to reach the threshold of 10 million tourists it two years ago, the official said, recalling the goal of reaching 20 million visitors by 2020.

The manager on the other hand, stressed that communication campaign launched by Morocco to make known his potential worldwide has also contributed to strengthening the position of the Kingdom in traditional markets including Spain and France and in new regions, such as the Eastern Europe and Latin America.

Haddad stressed, moreover, the significant increase in the number of tourists from the Arab region. Morocco is now recognized as the premier destination for Arab

¹³ <https://www.youtube.com/watch?v=iTjrj3Towok>

tourists, a position reinforced by the increased frequency of air flights linking Morocco to several countries in the Gulf region.

The official did not fail to emphasize in this context, the strengthening of tourist flows coming from West Africa, a region linked to Morocco by strong cultural and religious relations.

In order to consolidate its position in the international market, Morocco continues efforts to diversify its products, improving cultural destinations and further developing the capacities in the resorts, the minister said, recalling the significant investments in promising segments such as golf tourism and business.

This diversity gives Morocco more visibility and competitive advantage proved, noted the official, stressing that the health of the tourism sector resulting in a positive impact on the labor market.

Now more than 500,000 people are employed in this sector in Morocco, he said, noting that strengthening of foreign investment will help generate more jobs for young people. (Tourisme marocain: La stabilité facteur du succès, 2014)

VI. Conclusion

All figures show that tourism in the Kingdom of Morocco has been also hurt despite that the political situation is calm and the country has not suffered recent attacks. In 2015, this destination was decreased by 46% over January-May compared to the same period of 2014, according to the French National Union of Travel Agents (NUTA). A blow for a country whose tourism represents 10% of GDP. "*Overall, all Muslim countries suffer the aftermath of the attacks,*" says Jean-Pierre Mas, president of the National Union of Travel Agents (NUTA). A boon to European destinations (Greece, Italy, Spain ...). Yet trying to relativize the situation, the CEO of Voyageurs

du Monde, Jean-Francois Rial said that *"we have to explain that traveling in Morocco, Jordan, Oman, Turkey, Tanzania and Indonesia, all predominantly Muslim countries pose no particular problem"*¹⁴.

¹⁴ http://www.tourmag.com/Crise-dans-les-pays-musulmans-les-agents-de-voyages-ne-sont-pas-a-la-hauteur-_a75177.html

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