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## Determinants, directions and challenges of tourism development in Morocco

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**Abstract:** The purpose of the study was to analyze the current state of tourism development in Morocco, taking into account its most important achievements and opportunities in the context of sustainable development. On this basis and in relation to tourism development plans, particular attention was paid to the challenges facing the tourism sector in the country. In the course of the research procedure, our approach primarily relied on the analysis of source materials and observations made by the authors during their stay in Morocco. A comprehensive review of the relevant literature, reports, and strategic documents has demonstrated that over the past decades, the Moroccan government has been active in supporting tourism and encouraging foreign investments as a means to promote economic and social development. Simultaneously, activities towards tourism development are undertaken based on the following values: authenticity, diversity, quality, and sustainable development. Despite undeniable successes in this regard, the progression of tourism faces a range of challenges. One of these challenges is the highly concentrated geographical distribution of tourists and a still relatively undiversified tourism offering. Excessive concentration of tourist activities in coastal areas could lead to their degradation. To counteract this, a series of programs are being implemented, confirming that for Morocco, the priority is no longer solely the pursuit of tourism growth, but ensuring that progress in this field occurs while adhering to principles of sustainable development.

**Key words:** Morocco, sustainable development, tourism, management

### 1. Introduction

Tourism plays an important role in Morocco's economy. It contributes to economic growth, regional development and employment. At the same time, Morocco's tourism sector faces challenges in terms of competitiveness and tourist attractiveness (El Aouami and Louhmad, 2020). Today's tourists increasingly expect more sustainable tourism products. However, the tourism sector, an important driver of global economic development, often poses real problems in terms of its impact on the natural and socio-cultural environment (El Azyzy and Ekiz, 2021). In this regard in the development of global tourism, an increasing emphasis is placed on adhering to the principles of sustainable development. "Sustainable development is development in which the needs of the present

generation can be met without diminishing the chances of future generations to meet them" (United Nations, 1987). The fundamental premise of the concept of sustainable development is the assumption of the interdependence of nature, society and the economy. Achieving a state of balance between these planes is often difficult to realize. The situation is complicated by the existence of problems both indefining the phenomenon of sustainable development and its measurement. The cited definition—one of several attempts to conceptualize the phenomenon—is sometimes criticized as too general, especially if one takes into account the diversity of civilizational development in individual countries (Borychowski et al., 2016). However, despite many attempts, a universal-

ly-accepted definition is yet to be put forth. In addition, as Borychowski et al. (2016) note, the understanding of the concept of sustainable development can be linked to the level of economic development of a country. Governments of nations play a pivotal role in the development and management of tourism, and in making it more sustainable (Kapera, 2018). Their approaches and engagement in tourism development vary across countries. In the case of Morocco, activities in this domain have gained significance in recent years. Generally, the origins of tourism policies in the Maghreb countries trace back to the 1960s (Kałaska, 2020). Since 1999, tourism has been a key element of this development and for the first time became a leading sector in the balance of payments - foreign exchange (Kałaska, 2020). Recognizing its importance, public authorities have intensified efforts towards: implementing a strategic plan, attracting international capital, international promotion, deregulating administrative provisions, and notably constructing large resorts (Almeida-Garcia, 2020). Foreign capital significantly fuels tourism investments in Morocco, with France being among the leading countries investing in the Moroccan tourism sector (Sahho and Khudair, 2021). The attitude towards tourism development within Morocco has evolved over the years, with the latest plans reflecting an elevated intent to adhere to principles of sustainable develop-

ment. Recent studies, for example, draw attention to the over-accumulation of tourism in coastal areas, while Atlas areas, for example, could be attractive for the development of ecotourism (El Azyzyzy and Ekiz, 2021). On the other hand, by developing tourism in remote areas of the Atlas Mountains, areas affected by drought, poaching, deforestation, land degradation and overgrazing, some of the most promising ecotourism sites can quickly lose their charm (Peyron, 2003). The remedy for these problems is seen in sustainable development, while stressing that it can represent an opportunity to diversify Moroccan tourism (Idrissi, 2023). "Sustainable development is development that meets the needs of the present, without compromising the ability of future generations to meet their own needs" (Report..., 1987). A fundamental premise of the concept of sustainable development is the assumption of the interdependence of nature, society and the economy, but the very process of harmonising the relationship between them is difficult to be agreed upon (Kapera, 2018). Emerging challenges in implementing sustainable tourism development are discussed using the example of Morocco.

The purpose of the study was to analyze the current state of tourism development in Morocco, taking into account its most important achievements and opportunities in the context of sustainable development.

## 2. Source material and methods

At the beginning of the research proceedings, an analysis of source materials was performed. When crafting sustainable tourism policies, the foremost objective is to formulate strategic documents that provide a clear direction and framework for development and management. Such documents are created in the discussed nation and constituted the subject of analysis within this article.

The gathered data encompassed government reports and studies, tourism sector statistics, various scholarly articles, and research pertaining to the broader Moroccan tourism sector. Particularly helpful were data published by the: Organization for Economic Co-operation and Development (OECD), World Tourism

Organization (UNWTO) and The World Bank Group. The study analyzed strategic documents pertaining to sustainable development and tourism, including the: *National Sustainable Development Strategy and Stratégie du Tourisme au Maroc: Vision 2020*.

Additionally, insights from authors' visits to Morocco were also valuable. Prior to conducting field research, a comprehensive document analysis was undertaken. This preliminary investigation aimed to accumulate pertinent information regarding the topics of interest under examination. Building upon the analysis of source materials, statistical data, and personal observations, as well as insights garnered directly from tourism service employees on

site, the subsequent phase of the research procedure involved a detailed characterization of the study area. This was followed by an in-depth analysis focusing on: the conditions conducive to tourism development in the specified region,

## 2.1. Research area

Morocco occupies the strategic northwestern corner of Africa (Fig. 1), where the Mediterranean Sea meets the Atlantic Ocean. To the east and southeast, its border runs alongside Alge-

ria. To the south lies Western Sahara, currently administered by Morocco. To the north, the Spanish enclaves of Ceuta and Melilla are situated. The capital of the country is Rabat.



**Figure 1.** Map of Morocco, Source: <https://www.un.org/geospatial/content/morocco>

The Kingdom of Morocco is a hereditary constitutional monarchy, with King Muhammad VI from the Alawite dynasty reigning since the mid-17th century (Olech and Pawłowski, 2022). As of 2022, Morocco's population exceeded 37 million people. The largest city, Casablanca, is home to around 4 million people, making it one of the largest cities in Africa. Casablanca serves as an industrial, financial, and commercial hub of the country. Other major cities include Agadir, Tangier, Fes, and Marrakesh. Disparities between rural and urban areas are evident in the country. Approximately 64% of Morocco's population resides in urban areas. Mountainous regions occupy over

26% of the country's territory and are inhabited by about 30% of the population (National Sustainable Development Strategy, NSDS).

In 2022, Morocco's GDP was more than \$134 billion, with a GDP per capita of \$3,527.9 (Table 1). One of the challenges facing the Moroccan authorities is to eliminate inequalities in access to services and social protection and to increase women's participation in the workforce. Among the sectors in the economy, services currently dominate, but industry and agriculture are also growing. Mining is the principal sector of industry (Morocco has rich phosphate deposits). As for agriculture, the main products are cereals, citrus and olives,

but cereal production does not cover demand. Among services, the dominant sector is tourism. Within Morocco's economy, tourism holds a significant place and is regarded as a strategic sector driving the socio-economic development of the nation. Over the past 15 years, Morocco has experienced substantial economic growth driven by tourism activities, making it an important tourist destination (Almeida-Garcia, 2020). In 2019, tourism-generated revenues in Morocco constituted 7.1% of the total GDP, with the sector providing an estimated 565,000 jobs (5.0% of total employment) (OECD, 2022). In the same year, 144,000 individuals were employed in

hotels and similar establishments in Morocco (<https://www.statista.com/statistics/1249641/number-of-people-employed-in-hotels-in-morocco/>). The lack of sufficient gas and oil resources to meet domestic market demands prompted Morocco to invest in renewable energy sources (Olech and Pawłowski, 2022). Currently, it is perceived as a leading country on the continent in implementing renewable energy projects. Morocco also holds importance as a partner to the EU and NATO in counterterrorism efforts (Olech and Pawłowski, 2022). In 2004, the United States recognized Morocco as a major non-NATO ally (Olech and Pawłowski, 2022).

**Table 1.** Fundamental data related to the socio-economic situation of the country (based on: <https://data.worldbank.org/country/morocco>)

Indicators	Most recent value
Population, total	37.457.971 (2022)
Population growth (annual %)	1.0 (2022)
Net migration	-46.242 (2021)
GDP (current US\$)	134.18 (2022 billion)
GDP per capita (current US\$)	3.527.9 (2022)
Foreign direct investment, net inflows (% of GDP)	1.6 (2022)
Unemployment, total (% of total labor force)	10.5 (2022)
Inflation, consumer prices (annual %)	6.7 (2022)
Proportion of seats held by women in national parliaments (%)	24 (2022)
Forest area (% of land area)	12.9 (2021)
Access to electricity (% of population)	100.0 (2021)

\* GDP - Gross Domestic Product

### 3. Results

#### 3.1. Determinants of tourist attractiveness in Morocco

Morocco boasts diverse landscapes, rich cultural heritage, and is additionally considered one of the most stable countries in the region. The privileged geographical location of the Kingdom of Morocco makes it an ideal area for leisure tourism, especially due to its extensive coastline stretching between the Mediterranean Sea and the Atlantic Ocean. Along the Mediterranean coast, there are the Rif mountain ranges. Running diagonally through the country from southwest to northeast is the High Atlas moun-

tain range, parallel to which extends the Middle Atlas range from the north and the Anti-Atlas range from the south. A significant portion of Morocco, particularly in coastal areas, falls within the Mediterranean climate zone, characterized by dry, hot summers and humid winters. From the northern border with Algeria to the Strait of Gibraltar, these northern coastal sections are influenced by a warm and arid Mediterranean climate, contributing to mild, moist winters and dry summers. The Atlas Mountains

serve as a protective barrier to the north against the harsh desert climate prevalent to the south. South and east of the Atlas Mountains lies the Sahara Desert.

The primary centers of tourist activity remain Marrakesh and Agadir, where large or international hotel chains concentrate their operations. Through efforts to promote alternative destinations within the country, other cities like Fez, Tangier, and Essaouira have gained tourist interest in recent years. Morocco boasts 9 UNESCO-listed sites: Medina of Fez, Medina of Marrakesh, Ksar of Ait-Ben-Haddou, Historic City of Meknes, Archaeological Site of Volubilis, Medina of

Tétouan (formerly known as Titawin), Medina of Essaouira (formerly Mogador), Portuguese City of Mazagan (El Jadida), Rabat, Modern Capital and Historic City: a Shared Heritage. In 2019, there were over 4.2 thousand hotels and similar establishments providing hotel services operational in Morocco, and by 2021, the hotel establishments in Morocco had a combined capacity of around 280,000 beds (<https://www.statista.com/statistics/1232290/number-of-hotels-in-morocco/>).

Morocco enjoys favorable external transportation accessibility, including evolving air connections. The table below presents the 14 largest airports in the discussed country.

**Table 2.** Largest airports in Morocco (based on: <https://www.worlddata.info/africa/morocco/airports.php>)

Name	City	Airlines	Destinations
Mohammed V International Airport	Casablanca	27	87
Menara Airport	Marrakech	18	49
Al Massira Airport	Agadir	12	20
Nador International Airport	Nador	6	12
Ibn Batouta Airport	Tangier	6	12
Saïss Airport	Fes	5	16
Rabat-Salé Airport	Rabat	5	9
Angads Airport	Oujda	3	9
Tan Tan Airport	Tan Tan	1	1
Ouarzazate Airport	Ouarzazate	1	2
Cherif Al Idrissi Airport	Al Hoceima	1	1
Moulay Ali Cherif Airport	Errachidia	n/a	n/a
Mogador Airport	Essaouira	3	2
Beni Mellal Airport	Beni Mellal	n/a	n/a

The largest airline in Morocco is Royal Air Maroc, encompassing a network of over 100 destinations. In 2019, the airline transported

7.50 million passengers with a fleet of 52 aircraft (<https://www.worlddata.info/africa/morocco/airports.php>).

### 3.2. Tourist movement to Morocco

In 2019, Morocco recorded 12.9 million international tourists (OECD, 2022). However, in 2020, international arrivals plummeted by 78.5% to 2.8 million, and revenues from international tourism dropped to 36.4 billion MAD, representing a 53.8% decrease compared to 2019 (OECD, 2022). A limited recovery in tourism occurred in 2021, with 3.7 million international tourists, 71% below the 2019 levels (OECD, 2022). Among the main source markets for foreign tourist arrivals are France,

Spain, the United Kingdom, Belgium, and Germany. The relatively low level of target market diversification renders the domestic market highly susceptible to challenging economic conditions in Europe. The tourism sector endured substantial setbacks due to the health crisis and containment measures implemented by authorities to curb the Covid-19 pandemic. It suffered a steep decline in both foreign tourist arrivals and employment within the industry. The suspension of all international passen-

ger flights and maritime connections effective March 15, 2020, coupled with the declaration of a health emergency in the country, led to nearly complete cessation of tourism activity. Tourism revenues significantly declined, resulting in collateral negative effects, notably observed in the food, accommodation, and transportation sectors. In response to the pandemic, public authorities enacted numerous measures to support the tourism sector. Public and private entities collaborated at national and regional levels,

launching a revitalization program for the tourism sector spanning 2020-2022 (OECD, 2022). Noteworthy actions included financial support and social protection measures for tour guides. By June 2022, arrivals in Morocco were only 2.5% lower than in 2019, indicating a near pre-pandemic recovery (<https://www.unwto.org/startup-competition-invest-in-the-development-of-moroccan-tourism>). These figures underscore the rapid resurgence in inbound tourism to Morocco.

**Table 3.** Number of tourists in Morocco from 2017 to 2021, Along with information on Mmain source countries (based on the: OECD, 2022).

	2017	2018	2019	2020	2021
Number of tourists (tourist arrivals in thousands)					
	11.349	12.289	12.932	2.778	3.722
Top countries					
France	1.614	1.844	1.991	412	494
Spain	711	814	881	200	99
Belgium	260	274	272	41	65
United Kingdom	486	511	551	113	56
Germany	331	394	413	79	39

For comparison, in 2018, the country recorded 12.3 million international arrivals. France, Spain, and Germany remained the three major source markets, accounting for 57.5% of the market share (OECD, 2020). All main inbound markets increased from 2017 to 2018, with the number of residents from Germany rising by 10.1%, France by 7.6%, Spain by

6.4%, and the United Kingdom by 3.8% (OECD, 2020). Newer markets also performed well, including the United States, China, Poland, and Brazil. Currently, the most popular tourist destinations in Morocco remain Marrakesh and Agadir, holding a combined market share of 60% (Steenbruggen, 2016).

### 3.3. Directions of tourism development in Morocco with particular emphasis on sustainable development

The Moroccan government acknowledges the fundamental role of tourism in the country's economic growth and engages in promotional activities on international markets, aiming to effectively compete with other tourism markets in the Mediterranean region, particularly with Tunisia, Egypt, and Turkey.

At the national level, the body responsible for the development of tourism is the Department of Tourism, situated within the Ministry of Tourism, Handicrafts, and Social and Solidarity Economy. The ministry is responsible for formulating and implementing the government's tourism policy. It encompasses

various entities and directorates accountable for strategy, regulations, development, quality, resources, and training. Some administrative tasks in the tourism domain are delegated to sub-national levels. These entities oversee framework and quality supervision of tourism activities, monitor the development of tourism products at regional and local levels, among other responsibilities.

Morocco's national tourism policy aims to make the country one of the world's top tourist destinations. To achieve this, plans involve strengthening Morocco's presence in traditional markets and expanding into new

high-growth markets. Goals include enhancing the country's visibility as a tourist destination through promotional campaigns, partnerships with tour operators, and hosting significant events. Actions for tourism development are based on fundamental values such as authenticity, diversity, quality, and sustainable development (OECD, 2018). Within tourism planning, documents like "2010 Vision" and "2020 Vision" were developed to support and stimulate tourism activities while improving their impact on the country (OECD, 2022). The initial major strategic plan for tourism in Morocco, "2010 Vision," was approved in 2001. This plan marked a significant shift in tourism policy direction, aiming for intensive and rapid development of the tourism sector in a short time frame. However, sustainable development criteria were not highlighted in this plan (Almeida-Garcia, 2020). Overall, "2010 Vision" primarily aimed at enhancing general tourism sector indicators, whereas "2020 Vision" focused on sustainable development and ecotourism, striving to expand Morocco's attractiveness to include diverse rural areas such as deserts and mountains (Nezha et al., 2021).

The discussed document is Morocco's national tourism strategy, anchored in the broader development policy of the country, designed to make Morocco one of the top twenty tourist destinations globally while becoming a model for sustainable tourism in the Mediterranean (Tekken and Kropp, 2015). The document introduces an innovative approach to sustainable development, based on new-generation tourism products, long-term ecosystem management, and local participation in tourism development and its benefits (Roudines, 2010). Innovative sustainable development products include, for example: ecolodges, desert resorts and glampings (Roudies, 2013). Roudies (2013) emphasises "framework programmes for a diversified product range: The Azur 2020 Programme, Patrimony and Heritage Programme, Events, Sport & Leisure Programme, High Value Added Niche Programme (Business and Well-Being), Biladi Programme, Green/Ec/Sustainable development Programme". Included among the goals outlined in the document was the establishment of a control and monitoring system for sustainable tourism development. This system

was to be underpinned by performance indicators and an enhancement of sustainability criteria within regulatory frameworks (Stratégie..., 2013). A key element involves emphasizing the institutionalization of sustainable tourism through:

- 1) establishing specialized monitoring and assessment instruments for sustainable development indicators within the industry (to ensure compliance with thresholds for tourist density, water consumption, and the state of natural-cultural values) through regional monitoring;
- 2) reinforcing sustainable development criteria in legal and regulatory standards, to distinguish exemplary establishments and those making specific efforts in this direction (Steenbruggen, 2016).

In addition to the aforementioned plans, framework programs have also been devised to ensure a diversified range of products, focusing on sustainable tourism development issues. For instance, proposals include the creation of a Green Star in the new classification standards for hotels and reinforcing sustainable development criteria in legal and regulatory standards (Roudies, 2010). In 2017, the Moroccan Ministry of Tourism (in collaboration with other organisations) launched a study on the impact of the tourism sector on greenhouse gas emissions and climate change issues (Idrissi, 2023). Projects have also been developed to upgrade tourism development facilities and increase the competitiveness of travel agents, or the transport sector. Contests are organised to identify the best products operating under the label of sustainable tourism. The Kingdom of Morocco has signed and ratified major international and regional conventions related to the environment and sustainable development. In 2017, the National Sustainable Development Strategy was adopted to facilitate the transition to an ecologically-oriented economy conducive to social inclusion. This strategy comprises 137 specific goals within seven thematic areas: management, green economy, biodiversity, climate change, sensitive areas, social cohesion, and culture (Implementing the 2030 Agenda in Morocco). The document notes that to ensure the implementation of the strategy, it is paramount to establish a cross-cutting team of people to monitor the implementation of the

strategy and evaluate at each stage of implementation through the use of sustainable development indicators (National..., 2017). A year earlier, in 2016, African tourism ministers and heads of delegation met in Marrakech along with UNWTO officials to adopt the first African Charter on Sustainable and Responsible Tourism and sign the Declaration on 'Tourism

and Climate Issues in Africa' (UNWTO, 2016). One of the countries that signed up to the document was Morocco. It should be noted that in 2023 in Madrid, Morocco was rewarded for its efforts in sustainable development efforts by winning the title of 'Best Emerging Sustainable Destination' for 2022-2023 (Morocco's..., 2023)

#### 4. Challenges of tourism development in Morocco – discussion

Morocco is an example of an African country that undertakes comprehensive and planned actions in the realm of sustainable tourism development. Some of these activities yield positive results, while others require further efforts. The tourism offering in Morocco presents two primary weaknesses: a strong geographic concentration of tourists and a relatively undiversified tourism portfolio (Sbai, 2012; Lamnadi, 2016). This offering remains centered in four main cities: Marrakech, Agadir, Casablanca, and Tangier. Concurrently, tourism products provided by Morocco remain largely dominated by coastal areas. Other more sustainable forms of tourism (such as mountain, natural, cultural, ecological, and eco-tourism) continue to struggle to establish themselves as competitive tourism offerings (Lamnadi, 2016). Despite substantial development potential within mountainous areas (owing to their vast expanse and biological diversity), an imbalance persists between the development level of these mountainous regions and the rest of the country. However, it should be noted that in certain peripheral areas of Morocco, especially in the High Atlas and the southern part of the country, local resources tied to cultural heritage are gradually becoming important alternative assets that valorize local skills and assist in rebuilding local identity based on heritage (Boujrouf, 2014).

In most cases, the portrayal of the Moroccan tourism product in official promotional media remains superficial and fails to convey the genuine identity of the destination (Lamnadi, 2010). A separate issue pertains to the preservation of Morocco's natural and cultural environment. Changes brought about by tourism can disrupt these environments, particularly along the coasts where tourist traffic accumulates. Sim-

ilar to other coastal countries, Morocco faces challenges in protecting its marine environment (seas, coral reefs, lagoons, river mouths, fauna, flora, and biodiversity). These difficulties arise, among other factors, from the growing demographic pressure on coastal regions due to human activity and the expansion of infrastructure (roads, factories, resorts, etc.), pollution from households, industry, and transportation, and the persistently limited awareness of sustainable development principles (Sustainable development in..., 2012).

Coastal areas in Morocco experience intensive tourism development. Nezha et al. (2021) identify the following threats associated with tourism development in Morocco: degradation and alteration of natural landscapes and land-use changes due to hotel construction and mega-tourist developments, threats to local traditions and culture, biodiversity disturbance and habitat loss, transformation of land for tourist developments leading to loss of biodiversity, depletion of natural resources due to excessive exploitation to meet growing demand and fulfill tourists' needs and desires.

Concerning Morocco's cultural environment, research by Skowrońska (2010) indicates that 2/3 of Moroccan respondents observed cultural and mental changes resulting from the influx of tourists. Some respondents highlighted negative changes resulting from tourism development, such as price increases and excessive cultural blending (Skowrońska, 2010). Nonetheless, respondents emphasized that tourism facilitates employment and enhances knowledge about local heritage, artifacts, and the country's history. Cherkaouiet al. (2020) suggest contemplating a new tourism development plan, along with supporting rural tourism to prevent population migration from rural



areas and thereby stimulate economic activity in the country's interior. Other proposed solutions include fostering a new participatory approach that integrates the local population's involvement in natural resource conservation, supporting tourism industry professionals and stakeholders in developing sustainable tourism packages, implementing tailored and accessible financing tools for contributing to sustainable tourism development, and promoting ecological education. The challenge is no longer merely pursuing tourism development but striving for ecotourism development with a positive impact on the environment and its conservation (Cherkaoui et al., 2020). It is also desirable to pay

attention to the harmonisation of the different strategies concerning the country's development, including sustainable development, to monitor and measure the phenomenon, to establish financial support mechanisms (e.g. for entrepreneurs) that will influence changes in the application of the principles discussed in practice to a greater extent, and to increase efforts to raise awareness and inform tourists about the measures taken (Idrissi, 2023). It should be emphasised, however, that despite the above suggestions, a number of measures taken to date in Morocco to develop sustainable tourism can serve as inspiration for other countries around the world.

## 5. Conclusions

Morocco holds significant potential in terms of leisure tourism due to its location along the Mediterranean Sea and the Atlantic Ocean. The spatial and temporal concentration of tourist activity brings forth environmental protection challenges. Consequently, efforts are undertaken to mitigate the adverse effects of such circumstances. Tourism development plans have emerged, and activities focused on sustainable development and ecotourism are pursued, with the aim of enhancing Morocco's appeal by encompassing a diverse range of rural areas, including deserts and mountains. Morocco's National Sustainable Development Strategy

also draws attention to the need for evaluations at each stage of its implementation, the use of indicators and improved monitoring of sustainable development. It is also crucial to foster greater ecological awareness among the population and promote broader community representation in tourism-related decision-making. Nevertheless, it should be emphasized that Morocco has relatively swiftly initiated such measures compared to other countries on the continent, showcasing an in-depth approach to the principles of sustainable development in successive tourism development plans.

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