

Morocco

Tourism in the economy

Tourism makes a significant contribution to Morocco's economy and is considered a strategic sector for driving the country's economic and social development. In 2016 it was estimated that tourism accounted for 6.6% of GDP and 515 000 direct jobs, corresponding to 5% of total jobs. The sector generated MAD 77.3 billion in foreign currency income, of which travel receipts accounted for MAD 64.2 billion.

Since 2010 the number of inbound tourist arrivals has increased, on average, by 2% per year to reach 10.3 million in 2016. France is significantly the largest source market, followed by Spain, the United Kingdom and Germany. There was a decline in arrivals from the main markets in 2016, however, there has been an upturn in the first half of 2017. In addition, there has been a particularly rapid growth in arrivals from China in the last two years, although starting from a low base.

Domestic tourism has witnessed recent growth, with overnight stays in classified hotels increasing by 8% in the first half of 2017 compared with the similar period in 2016.

Tourism governance and funding

The Ministry of Tourism, Air Transport, Handicraft and Social Economy (the "Ministry") is responsible for drafting and implementing the government's policy for tourism. It contains several different entities and directorates, with responsibilities for strategy, regulation, development, quality, resources and training.

The external work of the central administration is relayed to the sub-national level through seven regional and eighteen provincial representative bodies. They are mainly tasked with:

- Supervising the framework and quality of tourist activities,
- Monitoring the development of the tourism product at the regional and the local level.

The delegations are responsible for ensuring the harmonious and integrated development of regional and provincial tourism, in collaboration with the local authorities, communities, and tourism professionals.

The following bodies are under the supervision of the Ministry:

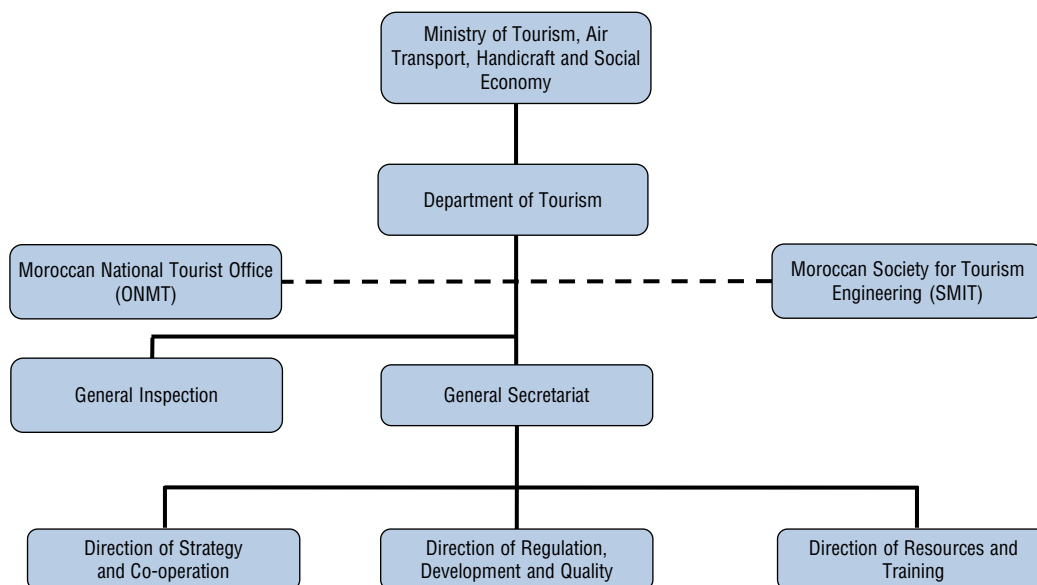
- The Moroccan Society for Tourism Engineering, which aims to promote investments through the implementation of the development strategy for tourism, by tracking the main tourism projects,
- The Moroccan National Tourist Office, which is in charge of promoting, marketing and growing the destination and air travel.

The Ministry maintains regular contact with different stakeholders within a clear and efficient institutional framework. Several bodies preside over links to the private sector:

- Several Committees co-chaired by the Ministry and the National Tourism Confederation focus on private sector engagement with the Vision 2020 Strategy, identification of key issues, and convening relevant parties to respond to issues as they arise. These Committees cover the following issues: governance, competitiveness, air travel, output and investment, human capital, and sustainability.
- The Tourism Observatory, which is a public-private initiative set up in 2005 to support the development of the tourism industry. Its main roles are information provision, and monitoring of the development strategy for tourism.

The Ministry’s budget comes from the central budget and totalled MAD 619 million in 2017. The budget remains relatively stable compared to 2016. It is divided between the various entities under the Ministry’s responsibility: 21.5% for the central administration, 9.9% for training schools, 48.5% for the Moroccan National Tourist Office, and 20.2% for the Moroccan Society for Tourism Engineering.

Morocco: Organisational chart of tourism bodies



Source: OECD, adapted from the Department of Tourism, 2018.

Tourism policies and programmes

The national tourism policy was formulated in 2010, with an undertaking to maintain tourism’s role as one of the drivers of Morocco’s economic, social and cultural development. The aim is to make Morocco one of the world’s top 20 tourist destinations by 2020 and establish the country’s sustainable development credentials in the Mediterranean basin.

When it first came to implementing the Vision 2020 strategy, the Ministry had to contend with an economic and tourism environment beset by significant turmoil, namely the geo-political situation in some countries.

The Ministry of Tourism, Air Transport, Handicraft and Social Economy, in collaboration with all public and private stakeholders, is stepping up its efforts to inject further impetus

into the sector. To this end, there are plans to strengthen Morocco's presence in traditional markets and to expand into new, high growth, markets. One objective is to improve Morocco's visibility as a tourist destination, through promotional campaigns, partnerships with tour operators, and hosting of major events.

The digital revolution is also reshaping the rules for promotion and distribution. In particular the growth of online peer review and booking platforms are undermining traditional intermediaries and shrinking the margins for hoteliers in Morocco. As a result, digital development is considered a priority to enhance the sector and several actions are planned to this end, in particular the referencing and leveraging of available accommodation, as well as optimisation of the travel experience.

Actions are being taken to deliver tourism development based on the following core values:

- **Authenticity:** for many decades, authenticity has been the foundation upon which Moroccan tourism development and brand positioning has been built. This position, which differentiates it from its direct competitors, now gives it a genuine competitive edge. Vision 2020 cultivates this historic choice through a proactive approach to the preservation, conservation and enhancement of the Kingdom's cultural and natural heritage.
- **Diversity:** Morocco's undisputed comparative advantage is its diversity in terms of territories and landscapes, natural resources and ecosystems, cultures and influences (African and European). Vision 2020 promotes diversity through an ambitious spatial planning policy.
- **Quality:** while the development of new capacity remains a strategic goal, Vision 2020 aims to significantly improve the competitiveness of all links in the tourism chain, and in particular deepen the service culture and develop a compelling entertainment offer.
- **Sustainability:** in accordance with the general sustainability guidelines adopted for the country, Vision 2020 puts sustainable development at the heart of its ambitions.

Also, the Kingdom of Morocco is attached to the values of openness, moderation, tolerance and dialog for mutual understanding between all the cultures and the civilizations of the world.

Under the tourism development strategy, the Ministry has put in place several tools to ensure long-term monitoring, in particular:

- A statistical monitoring system of tourism activity in order to provide an accurate range of indicators designed to meet the needs of actors in the tourism value chain. To this end, a monthly survey is carried out of a representative selection of tourists (international overnight visitors and Moroccans living abroad) in order to identify trends and better tailor the tourism offer to the requirements of an increasingly demanding clientele.
- A strategic monitoring system, designed to anticipate changes in both the tourism environment and supply and demand trends in world tourism, provide public and private sector stakeholders with better visibility, and give tourism professionals a decision-making tool to improve the management of their activities.

Statistical profile

Table 1. Morocco: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	2 265	2 399	2 403	2 645	2 929
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	188 859	192 606	195 778	..	..
Hotels and similar establishments	4 937	5 183	5 307	5 899	6 551
Specialised establishments	..	..	..	..	..
Other collective establishments	49 464	50 948	52 222	..	..
Private accommodation	134 458	136 474	138 249	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	9 375	10 046	10 283	10 177	10 332
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
France	1 770	1 782	1 798	1 564	1 450
Spain	731	683	684	627	616
United Kingdom	357	403	477	504	459
Germany	199	238	255	286	260
Belgium	255	273	267	244	239
Nights in all types of accommodation	..	121 575	120 822	110 597	112 407
Hotels and similar establishments	12 549	13 931	14 326	12 525	12 703
Specialised establishments	..	..	..	..	..
Other collective establishments	..	11 642	11 423	9 153	9 514
Private accommodation	..	96 002	95 073	88 919	90 190
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	2 316	2 195	1 849	1 910	1 864
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
..
..
..
..
..
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	8 491	8 202	8 748	7 764	7 922
International travel receipts	6 697	6 851	7 060	6 260	6 556
International passenger transport receipts	1 794	1 350	1 687	1 505	1 365
Outbound tourism					
Total international expenditure	2 095	2 002	2 218	2 155	2 309
International travel expenditure	1 253	1 318	1 401	1 402	1 457
International passenger transport expenditure	842	684	817	753	852

.. Not available

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933642039>

Table 2. **Morocco: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed				
	2016	2012	2013	2014	2015	2016
Total	..	480 000 e	500 000 e	505 000 e	507 000 e	515 000 e
Tourism industries	5 001	..	391 800 e	391 800 e	393 300 e	399 300 e
Accommodation services for visitors
Hotels and similar establishments	3 690	..	125 000 e	128 000 e	128 500 e	130 500 e
Food and beverage serving industry	81 000 e	82 000 e	82 300 e	83 600 e
Passenger transport	32 000 e	34 000 e	34 100 e	34 600 e
Air passenger transport
Railways passenger transport
Road passenger transport
Water passenger transport
Passenger transport supporting services
Transport equipment rental
Travel agencies and other reservation services industry	1 311	..	22 000 e	22 300 e	22 400 e	22 700 e
Cultural industry	9 800 e	10 000 e	10 000 e	10 100 e
Sports and recreation industry	2 000 e	2 500 e	2 500 e	2 500 e
Retail trade of country-specific tourism characteristic goods	120 000 e	113 000 e	113 500 e	115 300 e
Other country-specific tourism industries
Other industries	108 200 e	113 200 e	113 700 e	115 700 e

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933642058>Table 3. **Morocco: Internal tourism consumption**

Million MAD

	2014		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	32 000	73 508	105 508
Tourism characteristic products	21 648	53 666	75 315
Accommodation services for visitors	6 196	11 962	18 158
Food and beverage serving services	5 318	10 088	15 406
Passenger transport services	4 868	14 212	19 080
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	122	..	122
Travel agencies and other reservation services industry	43	1 100	1 143
Cultural services	106	1 017	1 123
Sports and recreation services	2 416	8 032	10 449
Country-specific tourism characteristic goods	2 580	7 256	9 836
Country-specific tourism characteristic services	..	..	..
Other consumption products	10 352	19 841	30 193
Tourism connected products	..	..	..
Non-tourism related consumption products	10 352	19 841	30 193
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933642077>



From:
OECD Tourism Trends and Policies 2018

Access the complete publication at:

<https://doi.org/10.1787/tour-2018-en>

Please cite this chapter as:

OECD (2018), "Morocco", in *OECD Tourism Trends and Policies 2018*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2018-51-en>

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