

Moroccan tourism facing the Coronavirus:

What kind of scenarios?

HADDAJI Ibtissam

PHD student Limpact Lab- Cadi Ayyad University Marrakech

Ibtissam.haddaji@ced.uca.ma

Abstract

Since the end of the 1960s, Morocco is proud of its tourism industry and to continue to develop it, thanks to new projects and visions but, from the arrival of the health crisis covid-19 in 2019, the sectors of the Moroccan economy experienced major disruptions, including tourism, which is the second-largest contributor to gross domestic product (GDP) and job creator with revenues of 74 billion (DH) in 2018 according to the Moroccan Tourism Office, the closure of international borders has resulted in the cessation of activity but also to push experts and tourism professionals to reflect on the globality of the Moroccan tourism model and detect its structural and organizational failures knowing that the sector experienced well before a set of crises that impacted it, in our article we will try to shed light on tourism in Morocco before and after the appearance of covid-19 by trying to foresee solutions that will help revive long-term tourism in a new form by acquiring new projects.

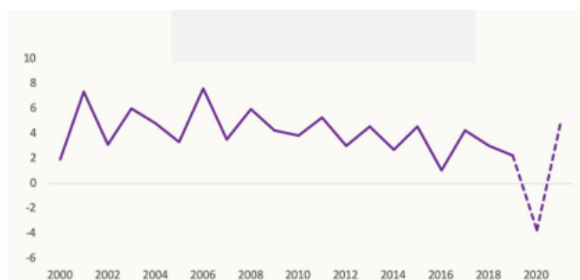
Keywords: *Covid-19, tourism model, 2020 vision, post covid19 scenarios*

Introduction

Covid-19 destabilized the tourism sector worldwide before landing on Moroccan soil, in France, Spain... , did not escape this misfortune that left the world bluffed and unable to resist, so the Moroccan tourist cities suffered the same fate as the regions: Casablanca Settat, Marrakech Safi, Tangier fahs anjra, Fez-Meknes which recorded a very high rate of the pandemic (almost 63%) arrivals at the border posts experienced a drastic decrease of (-79%) in 2020 compared to 2019 with 2.8 million non-resident tourists, travel receipts of 2020 amounted to 36,4 billion dirhams, recording a loss of (-54%(compared to 2019. whatever impacting the economy and society, so how can we approach this problem? can we propose solutions that will make it possible to put in place one or more rigorous strategies that will give Moroccan tourism a boost as well as all the stakeholders in this sector? in our reflection, we will try to put in place a reliable plan based on the data provided by the institutions related to the Moroccan tourism sector after our analysis of the consequences of

these data on the proper functioning of all the components of the sector on the one hand and on the other hand on the future of Moroccan tourism in the medium and long term.

Fig1: Morocco's GDP growth projection



Source: IMF World Economic Outlook April 2020

the Moroccan Central Bank reported the decline in national growth rates for 2020 from 3.8% to 2.3% due to the combined effect of the poor cereal harvest and the spread of the pandemic worldwide, "Current conditions suggest we are heading for the weakest growth in the last 20 years"¹, resulting in the deduction of the key rate of 25pbs at 2% to support national economic activity.

The National Tourism Confederation (CNT) estimated a loss of MAD 34.1 billion in tourism turnover for 2020 and MAD 14 billion in turnover loss for the hotel industry, and an overall fall of nearly 6 million tourists (-98%), which represents a loss of 11.6 million nights. It adds that at least 500,000 jobs and 8,500 businesses would be at risk, including classified tourist accommodation businesses, and tourist catering businesses, travel agencies, tourist transport companies and finally car rental companies.

The HCP said that almost 58% of companies (TPME) stopped their activities which left 30% of the workforce unemployed through the multiple economic crises that the mode has experienced, the tourism sector has resisted well but at this time of this global health crisis can we say that it will still face it? Will Moroccan tourism have the means and assets to do so? how? at what price? finally can we plan or implement a strategy for a tourism model after covid19?

Vulnerable tourism and series of crises

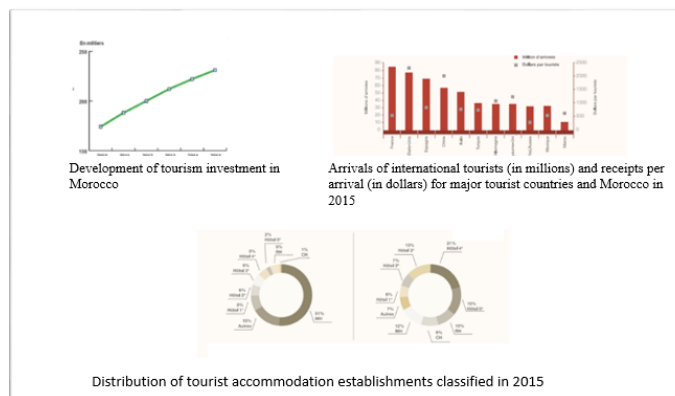
Morocco has exceptional assets: climate, diverse culture, historic cities and geostrategic positioning and despite its advantages, Tourism is suffering from several agitations since it has already overcome the economic crisis of 2008 thanks to the Moroccan financial system that respects the prudential rules of Basel in addition, it is characterized by its weak integration in global finance although tourism was less affected by this crisis by recording a slight increase of 2% of tourist arrivals in 2009, however the sector to continue to take more currencies (DH 53 million in 2009),² after overcoming this difficult stage, the sector has also experienced internal and external concerns, which mainly affect hotel financing, Morocco has continued to concentrate its efforts on improving tourism infrastructure at the level of known tourist cities (Marrakech, Agadir, Fes-Meknes) while making known the new promising tourist region: northern zone a

¹ The High Commissioner for Planning. Al-Maghreb Bank

² the Ministry of Tourism

significant mobilization of domestic and foreign direct investment that achieved an annual increase of 5.24% between (2010-2016) during the same period, the State implemented the absolute exemption of the IS and the IR on the foreign currency turnover of hotel companies for a period of 5 years, thanks to its measures the markets of traditional tourist cities (Casablanca Marrakech, Agadir.) have experienced a very high tourism development noting that these cities are also the most affected by the Corona virus which leaves us foreseeing a strategic repositioning for tourism.

Fig2: distribution of tourist accommodation establishments



Sources: Ministry of Tourism, Directorate of Strategy and Cooperation, Al Maghreb Bank

A tourism vision 2020 and a program contract at the heart of global economic transformations

The main objective of the 2020 vision, is that Morocco will be one of the 20 largest global destinations and will establish itself as a reference in the Mediterranean region for sustainable development based on 5 main strategies:

- Capitalizing on the achievements of Vision 2010: correction of the gaps by National Program Contract (CPN) public-private³
- Moving to a more integrated approach to land use planning
- Develop the most differentiated resources in the territory by meeting the needs of the most promising markets
- Addressing persistent structural weaknesses in the sector
- Putting sustainable development at the heart of the strategy

Based on 6 strategic programs: Azur, Green/Eco/Sustainable Development, Heritage and Heritage, Animation-Sport, Niches and Biladi for 8 territories with tourism coherence, attractiveness and critical mass (with regard to hosting capacities, for example, etc.) in order to obtain good international visibility and so that

³ The State represented by: The Ministry of Tourism and Crafts - The Ministry of Economy and Finance - The Ministry of the Interior - The Ministry of Foreign Affairs and Cooperation - The Ministry of Equipment and Transport - The Ministry of Energy, Mines, Water and the Environment - The Ministry of Trade, Industry and New Technologies - The Ministry of

National Education, Higher Education, Executive Training and Scientific Research - The Ministry of Employment and Vocational Training - The Ministry of Youth and Sports - The Ministry of Culture the private sector by: The General Confederation of Enterprises of Morocco - The National Federation of Tourism - The Professional Group of Banks of Morocco

each destination is able to offer a unique product while maintaining consistency with others

Note that the term: tourist territory refers to the tourist territorial division and the notion of the region refers to the administrative division.

Fig3: CPN Vision 2020 Programme Contract
30/11/2010

2020 objectives by tourist territory	Additional litter capacity (number of beds)	Non-resident tourists (in thousands)	direct jobs	Tou rec (M)
Souss Sahara Atlantique	75 200	3 989	181 245	1
Maroc Méditerranée	17 800	921	44 401	1
Marrakech Atlantique	26 000	3 688	166 007	1
Maroc Centre	20 700	2 791	128 973	1
Cap Nord	28 300	2 777	128 020	1
Centre Atlantique	12 500	3 800	179 630	1
Grand Sud Atlantique	3 200	114	5 692	1
Atlas Vallées	10 600	1 920	80 737	1
Morocco	194 300	20 000	914 706	1

On the other hand, the price report of the accounts ⁴ includes the presence of an implementation of the PCRs including the projects launched to establish the tourism territories according to the predefined objectives of the 2020 vision, the reduction of the CPR cannot be done by simple actions because of the costs of commitments of tourism projects which rises to 77% for an investment capacity of 73% but still the development of the Azur stations remains difficult because of the no-compliance with the State’s commitments in terms of support for the Azur plan as defined in the 2020 vision programme contract (investment premium, tax advantages to be implemented) includes Governance for the development of the tourism

product, So one can only wonder if the ambitions of the 2020 vision have taken into account the effects of the economic crisis? certainly the beginning of the crisis recorded a strong resistance that allowed the realization of tourism projects in the medium term until 2016 the vision 2020 was deeply affected by the terrorist attacks in some countries⁵ and the variations observed on the power of buying tourists because of the economic crisis leading to major disruptions at international level. The course of accounts proposed a list of recommendations that can help the 2020 vision to maintain its balance such as:

-Implement the investment premium in accordance with the commitments of the national programme contract signed in 2010.

-The SMIT must have a status that provides special schemes at the level of tourist resorts (such as TMSA, Agence de Bouregreg, Agence Marchica, etc.), as well as a financial fund capable of developing tourism products.

-Set up governance bodies at the national and local level with support in training tourism businesses, or 6.7% or 9.3%. Finally, tourism jobs have, for their part, missed the 2015 objective: 507 Miles instead of 645 thousand jobs.

In fact, events have followed one another quickly and have somewhat hindered the achievement of the desired objectives of the 2020 vision the

⁴ The summary of the special report No. 02/15/CH IV of the Course of Accounts

⁵ The terrorist attacks of 13 November 2015 in Paris and 22 March 2016 in Brussels had considerable economic repercussions

economic crisis as it is quoted before that has reduced tourism growth by 2.2% in Europe especially which the latter is strongly linked The Arab spring and the rise of fundamentalism are also added to the Moroccan tourist market.

At the national level, the implementation of the governance model accompanied by an advanced regionalization whose launch was under the patronage of SM Mohamed 6 and the consultative commission on regionalization in 2010 was difficult since only 25% of investments were operated for 2015 by focusing on the development of 8 tourist territories at the same time with major projects such as seaside resorts without taking into account the poor functioning of the institutes concerned or the different disagreements with some regional partners (RAM/ SMIT),⁶ on the other hand, several agreements were signed on the sidelines of the CPN unfortunately they recorded a major delay.

7

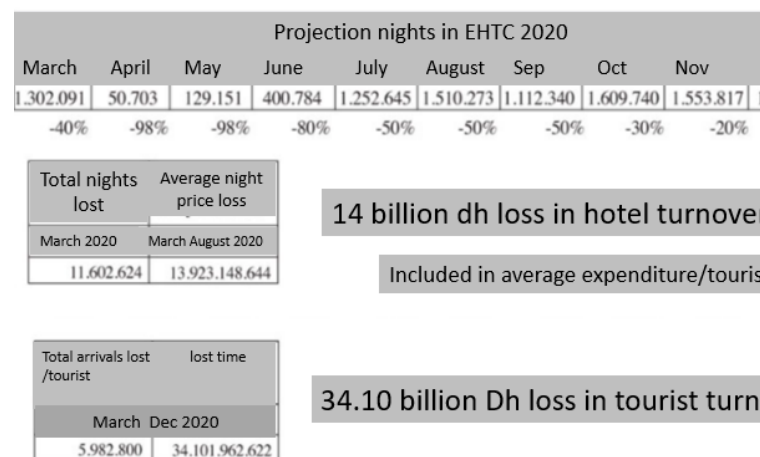
Thus, the Moroccan Tourism Department has drawn up a roadmap 2017-2021 that surely requires the participation and involvement of all stakeholders.

Moroccan tourism and covid 19: should it not be renewed?

In order to try to answer this question it must be remembered that the current difficult situation is

an accumulation of all the historical events you Moroccan tourism among them the crises that have just been mentioned which are linked and make the Moroccan tourism model very depending on foreign tourists so it may be necessary to be refocused on the domestic demand at least on a commutative basis at this level the sector is fragile and will not be able to undergo decisions or poorly calculated strategies but can even ensure a general diagnosis of Moroccan tourism outside all possible crisis? especially since the pandemic has focused on the failures and shortcomings of the Moroccan tourism model that hinders its evolution and resistance or even its reinvention is certainly a sector accustomed to crises but the covid19 crisis is a new experience that affects the whole world where the destinations are all closed which leads researchers and specialists in the sector to imagine several scenarios:

Fig4: nights in EHTC 2020



⁶ Speech by His Majesty King Mohammed VI on 3 January 2010

⁷ As the Memorandum of Understanding «Creation of a centre of excellence in hotel management in

Morocco», the Partnership Agreement on the establishment of a credit mechanism dedicated to the financing of tourism projects under the plans of Azur and Azur extension

Source: European Union Delegation to Morocco - Trade
Section

Note on the economic impacts of Covid-19 in Morocco
as of 26/03/2020

The Moroccan State recorded less returned due to the decrease in economic activities and a sharp increase in phosphate prices and interest rate, businesses have relied on government support to overcome this crisis because the latter has put in place measures to support households and businesses:

- the creation of a Solidarity Fund on the initiative of His Majesty King Mohammed VI, a special fund with DH 10 billion initially plus other donors;
- the payment of the (CNSS) was suspended for companies from 1 March to June 2020, they benefited from a moratorium on the repayment of bank and leasing loan maturities until 30 June 2020 with 0 fees.
- the Central Guarantee Fund (CCG) has set up the "Daman Oxygène" product for small and medium-sized businesses with a turnover of not more than DH 200 million and intermediate companies with a turnover of between DH 200 million and DH 500 million.
- For employees on temporary absence from work, they receive a lump sum of 2000 Dh in addition to family allowances and the AMO as well as the extension of the term of consumer and real estate credits until 30 June 2020.

On the other hand, professionals in the tourism sector are eagerly awaiting the definitive reopening of international borders to redress the

bar and bring in foreign exchange revenues a situation that is well at stake and that knows an instability of the forced or temporary closure that threatens even more direct and indirect job losses or bankruptcy for some companies despite the fact that at this time of crisis they focus mainly on domestic demand the latter has been developed from In the 1980s, since it was not part of the public programs and policies of the tourism sector in the 1960s and 1970s, many economists defended it well, their ideas focused on the inability of developing countries to Professor Mohamed Berrianea writes about the moussem, which he believes are thematic fairs that have been created for years already constituting a group of pilgrims to memorize a saint annually sometimes some disappear as soon as they saw the day moussem represents for some anthropologist a staging of folklore it is also an object of study for geographers, sociologists, or political anthropologists recall that internal demand has potential on which would not interfere with currencies did not interest tourism professionals but can be said what can serve as an alternative or means of compensation of tourism international? especially at this time of global health crisis, at least what is certain is that it was a temporary solution at the time of the Gulf crisis (1990-1991) and the attack of the Atlas Asni hotel in Marrakech in 1994 by contributing to 28.4% of tourist nights compared to (-36.5%) of international tourist nights thanks to packages granted by professionals in the sector for the

benefit of Moroccan families during the different seasons private initiatives far from any institutional or associative intervention in 2000 the Moroccan State led a study that has its conclusions to encourage the Moroccan tourism policy especially after the crisis of September 11 to adopt the Kounouz Biladi operation in 2003, but beyond this weak point concerning the domestic demand other worries appear especially in c moments difficult if one excludes the disorder at the level of the informal tourist sector one notices that most of the public policies massively favors certain inland destinations such as Marrakech and seaside tourism while tourist demand is oriented towards the cultural riches of Morocco a high concentration of tourist products offers at the level of cities such as Casablanca, Agadir, Marrakech or Rabat and which benefits from 77.7% of the total nights a significant percentage that leaves little chance for other tourist regions, the supply and demand that are limited in this area make ⁸

Impossible the expansion of the benefits of tourism especially in terms of jobs, and also led us to wonder on what model of development can mitigate this regional gap that results in territorial injustice in Morocco

The impact of climate change on Moroccan tourism

The tourist areas in Morocco are characterized by a particular comfort that is felt by the temperature, humidity etc... the country and the Mediterranean are among the five world tourist destinations⁸ if the climate is sometimes too dry or too wet it disturbs the tourists who in general seek the balance between its data , public policies give more priority to a tourist product focused mainly on the beach and the sun which still makes the clients

of a more vulnerable European majority and which can decrease its departures because of its climate change on this subject a vulnerability study of the Moroccan tourism sector to climate change was conducted on 13/04/2017 by associated international experts⁹ and updated on 05/05/2017 at the request of the Ministry of Tourism in which a map of tourist comfort was used to show the impacts related to this notion of comfort according to the Mieczkowski index, developed in 1985

With a comfort scale from the daytime thermal comfort index, monthly rainfall, number of hours of sunshine and wind speed, A highlighting of the change in tourist comfort in Morocco compared to the main tourist competitors of Morocco such as the countries around the Mediterranean and southern Europe.

(From right to left)

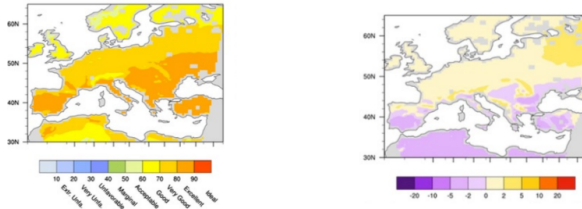
⁸ The Mediterranean, Caribbean, Indian Ocean, Pacific Ocean as well as Australia and New Zealand.

⁹ Carbone, Tec conseil, Marseille Associated international experts : S. Gössling, Professor,

Linnaeus University, Sweden Paul Peeters, Professor, Breda University/ NHTV, Netherlands

Map 1: ref map of the Mieczkowski index on the Maghreb-Europe zone (1971-2000)

Map 2: Map of the evolution of the Mieczkowski index over the 2021-2050 period



According to these two maps we notice the displacement of the tourist comfort zone towards the North and European countries with an increase in temperature and a decrease in precipitation, according to some experts the direct result of this change will trigger the departure of tourists to Europe it is only eventually still according to them since the other models do not give the same result observed.

The major threat for Morocco is at the level of the Atlantic coast where the seaside sites are established especially those which know a strong fragility of the soils or slopes or the Mediterranean coast (erosion, submersion..) a situation that also disturbs the areas of animal and plant species, urban areas will not escape this bad fate then that the temperature will be high which will cause a degradation of the air quality pressure on the demand for energy and drinking water but especially will cause a huge stress on the residents

an uncomfortable sensation that will be detected especially in cities known by tourism such as Marrakech Fez, Meknes.

Mountainous and oasis areas are also affected, according to IRES¹⁰ between 2040 and 2050 Zagora will experience a threshold of water stress Ouarzazate, the threshold of water shortage would also be reached in the same period, oases will need more water (67 to 380% in 2050) saw also the growth of the population which will overexploit the aquifers which will threaten the disappearance of the oases included the appropriate tourism in Atlas the fall of the snow because of the warming of the temperatures of the activities will stop like skiing which will threaten the development of tourism and these circuits (Oukaimden station).

The unpredictability of changes in post-Fordist tourism demand

If Morocco is mainly based on tourist attraction by seaside resorts especially with its main clientele Europe, the world has experienced a development of other tourist markets that changed the behavior during the holidays the desire to discover remote regions, the escape into nature a responsible ecological attitude that requires an adapted soft offer and that can be linked especially to rural areas today the «New tourism» favors the demand more than the offer in the selection of tourist products, so the tourist is independent free and can easily use the latest

¹⁰ Khattabi A., Chriyaa A., Hammani A., Moudoud B., (2014), Climate vulnerabilities and development

strategies, Programme of studies «Climate change: impacts on Morocco and global adaptation options».

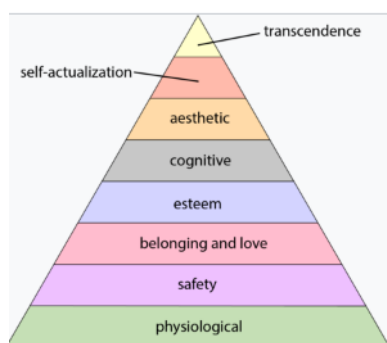
communication and information technologies to target a quality service or product that meets the standards of sustainable tourism so we are transiting towards individual tourism, mobile, Morocco must reinvest in this direction and not towards the coast by giving meaning to spontaneous demand the country is free from conventional investments and forms of old accommodation public policies must also become aware of these changes that some countries have known as the Mediterranean to adapt to the current crisis.

Long-term scenarios for post-covid Moroccan tourism

-Tourism scenario 2030

For a tourism transition in the context of tourism 2030, the objectives are based on a morphological analysis between tourism demand and supply, in this context the demand metric is based on the satisfaction scale among tourists according to the known psychological scale of Maslow.

Fig.7: tourist demand according to the hierarchy of needs



Source :

https://en.wikipedia.org/wiki/Maslow%27s_hierarchy_of_needs

1) *The option chosen by «Tourism 2030», focuses on the roles of public and private agents who participate together in improving the supply that becomes more important for countries with tourism products and whose largest investments are in the private sector, Morocco will have to make a heavy change since it is anchored at an initial stage compared to countries that have spent years in tourism if the 2010 vision marked the launch of the State in an evolutionary phase for a distinguished tourism product far from purely commercial approach the 2030 alternatives will be different and will focus essentially on the attribution to the future with heavy transformations of the whole tourist system a concentration on the development tourism and the good knowledge of the market, diversification of tourism products taking into account the common relations of public and private interests and the needs of tourists.*

2) *-Scenario towards a Sustainable Tourism*

3) *An awareness of the change that the future society will experience based on the sustainability of economic growth in parallel with the Blue Plan (UNEP)¹¹ which ensures cooperation between the 27 countries bordering the Mediterranean Morocco will then have to adopt a policy such as that adopted by advanced*

¹¹ Located in Marseille, Bleu Plan is managed by an association under French law (law 1901) a team and experts who produce studies and scenarios for the

future, to raise awareness among Mediterranean actors and decision-makers on environmental and sustainable development issues in the region

countries who have updated a set of conscious and responsible companies.

4) Our country will be able to adopt a strategy that prioritizes inland and rural tourism as a fundamental source for agricultural and craft populations, but also public policies must optimize the reception capacities within the tourist territories by putting in place regulatory legislative facilities to identify the tourist urban environment and natural sites a good financial contribution will ensure the proper management of cultural sites with the support of the private sector, the range of services will be diversified and other markets will appear beyond the traditional European market to global markets

5) -Scenario for a territorial tourism

6) Moroccan tourism is related to the territory and its development although the latter is a matter of public order unlike tourism which concerns the private sector or control of the public sector¹² a complexity that results from this given the actors involved in this development or the territorial recomposition that remains even more complex especially if we do not measure the consequential effects, Territorial tourism is launched from innovative tourism offers and products and adapted to the fundamental foundations of new territoriality by local actors who mobilize and create projects in partnership with the public sector, private or associative and

that take into account the impact of climate change on the tourism product of the territory this mobility of actors must also evolve and be attentive to the changes that tourism knows, heritage and why not involve a new actor (foreign project leaders) to lead to a new base of a new tourism such is the case of: The rosary of oasis of the zone of Ouarzazate¹³ on mountainous and Osian areas, in the hinterland, retired tourists for the most part who are carriers of projects of life style, amenities and migrants. This need to take refuge in rural areas with a distinguished landscape to have a quiet lifestyle and high quality despite the fact that Morocco also knows the presence and construction of informal tourist territories that are organized around houses host, inns or gites sometimes not classified

7)

Fig8: the evolution of guest houses and other tourist establishments

	2017	2018	2019**	2020**
+ Hostels	29 721	30 813	31 818	32
+ Others*	26 294	27 727	28 887	30

Source: Statistics of the Ministry of Tourism

* Others: Hostels, Pensions, Motels and Gites, Camping, Real Estate Residences

It becomes very urgent to think of tourism after covid19 by activating an alternation of the current tourism model taking into account the

I. ¹² SAÏD BOUJROUF TOURISM AND REGIONAL PLANNING IN MOROCCO: WHAT ARRANGEMENTS? P. 12-19

¹³ (Oussoulous, 2019; Berriane et Nakhli, 2011; Oussoulous et Berriane, 2020)

maintenance of responsible and sustainable territorial tourism that associates with the new desired model in other words mass tourism that exists in its authentic form and new tourism that accentuates the territory and activate the tourist offers of the hinterland.

Conclusion

Morocco is in a conflict geostrategic zone since many experts foresee the existence of a conflict of civilizations, with its different economic dimensions, The crisis covid19 has revealed the undeniable assets of the State and civil society to face and resist the crisis of course there are gaps to fill lessons to be learned. The approach that Morocco must make is based on the conclusions reached by the studies of several Moroccan or foreign experts that relate to the traditional tourist demand that must be directed to the markets of the countries of East European Asia and America an expansion that will allow Morocco in the coming years to distinguish itself in the Mediterranean region. The development of new technologies and techniques of communication and information which implies the ecological dimension, cultural within the tourist offers will only increase the maturity and the quality of the tourist products.

At the individual level, the covid-19 crisis has taught us to focus more on finding a psychological balance and thus develop a strong expertise aware of the severity of the crisis and disaster management.

In the context of globalization and globalization competitiveness is fierce especially in terms of sustainability and quality, the Moroccan tourism model must be adapted by the commitment of the public sector, and public-private partnerships that will strengthen the implementation of land use plans and the smooth functioning of the knowledge society.

The Moroccan Tourism Office and the CRT have targeted domestic tourism with interesting promotional offers so that the Moroccan tourist can know how to visit the unknown regions of his country nevertheless it can be said that this initiative does not exist until of crisis it must be valid forever if really Morocco wants to take the path of sustainable tourism, territorial, the course is difficult but not impossible despite the covid19 crisis strategies can change with new assets to ensure tourism renewal.

Bibliography

Belghiti Alaoui, Abdelali, (2020), « Investing in health security now more than ever.», Policy Brief N°20-27, Policy Center for the New South Berriane Mohamed, 1992, National tourism and leisure migration in Morocco, geographical study, Rabat, Faculty of Letters and Humanities, series «Thesis and dissertations», n° 16.

Berriane Mohamed, 1993, « Moussem in Morocco : tradition and change », Geography and cultures, Space and Culture Laboratory, no. 7, pp. 27-51.

Oussoulous, Nada, 2019, The emergence of a rural tourism destination and the role of foreign

residents: The case of the country of Ouarzazate,
PhD thesis in Geography, Mohammed V
University, Rabat, and Paul-Valéry University,
Montpellier

Bleu plan, 2012, Tourism and Sustainable
Development in the Mediterranean, Final Report,
(consulted on 01 February, 2024)