



Eastern promise

Cultural tourism opportunities in Morocco

Sitting on the very edge of Europe, Morocco has attracted international tourists for generations. Tourism is, and will continue to be, of critical importance for the country's national economy. The Government is now embarking on a national tourism strategy, *Vision 2010*, which will see Morocco's tourism industry transformed within the next decade and its contribution to the national economy considerably enhanced. Morocco became a target market for UK trade promotion in 2001. **Tim Ambrose**, a director of Locum Destination Consulting, was a member of the Trade Partners UK Scoping Mission to Morocco this September, led by **Jane Weeks**, Museums Export Adviser at the British Council, which explored opportunities for British business and organisations in the cultural heritage and tourism sector to engage in the country's new tourism strategy. Here, they outline some of the findings of the mission.

Lying only 14km from the coast of Europe, Morocco has a long and rich cultural history. From 1912 to 1956, the country was a French protectorate, and the French influence is still strong, with French being the second language and French tourists forming the largest group of international tourists. While there are strong continuing ties with France, the new King, Mohammed VI, is keen to develop broader contacts for Morocco, and to encourage English language training.

Morocco is now Britain's third largest market in the Middle East and North Africa region. UK trade with Morocco has trebled in the past decade, and Britain is Morocco's third largest trading partner, after France and Spain. The Moroccan Government is keen to develop the strength of its economy to ensure harmonisation with the European Union for Free Trade purposes by 2010.

Tourism - the current state

The tourism sector in Morocco has become a key driver of the national economy and accounts for 7 per cent of GDP, earning the country 27.8 billion DH (£1.75 billion). The sector currently employs 640,000 people.

Morocco attracts some 2.2 million international tourists per annum, the majority being French and Spanish. Over 40 per cent of the international tourists go to Agadir, the main beach resort, and

30 per cent go to Marrakech, where cultural tourism in this internationally known destination is the main attractor. In the wake of the events of September 11th, tourism figures were down 12.7 per cent at the end of June, although the number of UK tourists appears to be remaining constant.

As well as sun, sea and sand holidays and cultural tourism, Morocco is also increasingly attracting those wanting to play sport or take part in adventure tourism. There are 18 golf courses, and facilities for tennis, riding, trekking, desert safaris and hang gliding are all on the increase.

Tourism strategy - the future state

The Government's new tourism strategy, *Vision 2010*, is very much based on the King's own personal initiative. In a speech announcing the launch of the strategy, given on 10 January 2001, he identified tourism as a national priority and his commitment to the benefits of tourism has given an important impetus to the strategy. At governmental level, the tourism strategy is viewed as a mechanism for combating the high levels of unemployment, lack of educational attainment and scale of poverty in the country with the political implications that these carry.

The strategy's targets are ambitious, more so given the downfall in tourism since September 2001. In essence, they are as follows.

- 10 million tourists to be welcomed annually by 2010.
- 80,000 new hotel rooms to be built, 66 per cent in the seaside areas.
- 600,000 new jobs to be created.
- Six major new coastal resorts to be developed.
- 1,000km of new roads to be constructed.

It is planned that these targets will be achieved through concentrating on beach tourism (the so-called 'Plan Azur'), cultural tourism and rural tourism.

The Government is keen to attract investment. It has offered a number of incentives for the private sector and is implementing a number of allied initiatives:

- The national airline, Royal Air Maroc, is to be part-privatised.
- British Airways is to increase the number of its flights to and from the country.
- Regional airports are to be developed in particular to support the Plan Azur proposals.
- The Moroccan Tourist Board (ONMT) is to be restructured and its promotional budget increased to 500 million DH (£31.25 million) by 2003.
- Tourism training is to be developed to build capacity for the new developments.

The Plan Azur and Beach Tourism

The Plan Azur is a key element in the new *Vision 2010* tourism strategy, and its most developed part (see www.investintourism.ma for a detailed presentation of the Plan Azur programme). Six locations have been chosen on Morocco's 3,500km of Mediterranean and Atlantic coastline, and the aim is to develop coastal resorts at these locations for the affluent international and North African tourist. A selection programme for potential developers for the resorts is currently underway.

Each resort will be offering a slightly different product to appeal to different markets and encourage repeat visitation.

- Plage Blanche, the southernmost resort, will be positioned as 'an oasis by the sea', with rare birds, fossils and archaeological sites to appeal to the ecotourism market.
- Taghazout will be positioned as a resort for sport and leisure activities. This contract has already been awarded to the Dallah Baraka Group.
- Mogador is close to the World Heritage Site of the Medina at Essaouira. It is probably the most attractive proposition as

Essaouira is already an established tourist destination and much of the infrastructure is in place.

- El Haouzia will be positioned to attract the seminar and training market, as well as offering sports facilities.
- Khemis Sahel will offer health and fitness facilities, and nature-linked sports.
- Saidia will offer sports and leisure facilities. It is near to the border with Algeria, which is currently closed.

Of the six resorts, Plage Blanche and Saidia are the most challenging, as there is no infrastructure at Plage Blanche, and Saidia lies next to the Algerian border.

In addition to creating new coastal resorts, existing resorts such as Agadir and Tangier, which have suffered from a lack of investment will be refurbished and relaunched. Up to now, the concentration of Government investment has been in the south of Morocco, and much investment will be needed in the north to bring the hotel stock up to an acceptable standard.

Cultural tourism

Morocco has a rich cultural heritage, with over 300 listed sites, including archaeological sites, such as the Roman town of Volubilis, and Imperial cities such as Fes, Meknes and Marrakech. Traditional crafts such as stone- and wood-carving, silver-smithing, leather-working and textiles continue to thrive and, in addition to this tangible heritage, there is an important intangible heritage of storytelling, festivals, music, dance and song.

Despite the strong emphasis placed on the importance of the cultural heritage in the new tourism strategy, there seems as yet to be only a limited synergy between the Ministry of Tourism and the Ministry of Culture, with the latter having only a comparatively small budget to maintain and develop the country's key cultural heritage assets.

Morocco currently has seven World Heritage Sites, and further applications for World Heritage Site status are being considered (see *Locum Destination Review* Winter 2001 for a discussion of World Heritage Sites). The sites and their inscription dates are as follows:

- The Medina of Fes (1981)
- The Medina of Marrakesh (1985)
- Ksar Ait-Ben-Haddou (1987)
- The Historic City of Meknes (1996)
- The Archaeological Site of Volubilis (1997)
- The Medina of Tetouan (1997)
- The Medina of Essaouira (2001)





The impact of the recent elevation of Volubilis to World Heritage status has had a dramatic effect on its visitor numbers.

Morocco has a wealth of historic buildings, many of which are in a relatively poor condition, but little Government funding is available for restoration, and the major works have been undertaken by a limited number of private foundations. The Fondation ONA has restored the twelfth-century Mouahedin Mosque of Tinmel, near to Marrakech, and the Art Deco Villa des Arts in Casablanca, which is now an exhibition space. It has plans to restore the nineteenth-century Parc de l'Hermitage in Casablanca. The Fondation Omar Benjelloun has restored the Medersa Ben Youssef and the Mnebhi palace in Marrakech, both of which are now open to the public, the latter housing the Musée de Marrakech.

In Casablanca, the Fondation Omar Benjelloun has restored the Art Deco Tourelles des Arts, which, like the Musée de Marrakech, now houses changing exhibitions of Omar Benjelloun's private collections. The Fondation also has plans for restoring the early twentieth-century Catholic cathedral in Casablanca as a performing space, and building a maritime museum in Sale and another museum in Fes. Also in Fes, the Fondation Mohammed Karim Lamrani has restored the Nejjarine complex of buildings to house a museum of wooden artefacts.

The World Bank is providing funding for a loan to encourage the survival of traditional crafts in Fes, and has funded restoration works in Marrakech.

There are development plans for the archaeological site of Volubilis, the most complete and dramatically sited of Morocco's archaeological sites. This entails the construction of a visitor centre, designed by the British architectural practice, John McAslan and Associates, but no funding for its implementation is yet in place.

Rural and ecotourism

While the new tourism strategy has placed a strong emphasis on coastal resort developments as a key driver, rural tourism is also recognised as an important area for future development.

The development of trekking circuits, the renovation of shelters, and the improvement of infrastructure are all underway. There are significant opportunities for small niche operators and already a number of British companies are taking advantage of the burgeoning interest in trekking and adventure holidays.

Priorities for the rural population in Morocco however are initially the provision of clean drinking water and healthcare, and educational opportunities particularly for girls in rural areas. As a

consequence, there is limited funding yet available for rural tourism and the cultural heritage associated with the countryside areas.

Challenges and opportunities

The large-scale development of the sector planned within the next ten years has highlighted the need for investment in training. The Government has recognised within the new strategy that training is needed at all levels to meet the demands of the new developments. At present, the Department of Tourism has 14 educational establishments and a capacity of only 3,070 places. New training and development strategies will need to be put in place by both the public and private sectors to meet the undoubted challenges posed by the tourism strategy and its implementation programme.

There is a wide range of opportunities for British businesses wishing to engage in the Moroccan tourism market, although companies need to be pro-active in assessing opportunities and seek help and advice from Trade Partners UK, which provides a powerful array of business support services. In particular, there are opportunities in the following areas:

- Resort development / hotel renovation
- Hotel management
- Specialist tour and travel operators
- Events management
- Training (hotel and cultural heritage management)
- Feasibility studies

However, companies considering working in Morocco should recognise that the country is still strongly centralised and that fast-track decision-making is not a general feature of Government departments. While steps are being taken by the Department of Tourism to improve the quality of data on the tourism market, there is a general lack of detailed tourism statistics. Above all, for UK companies wishing to work in Morocco, establishing local partnerships is an important requirement and assistance in identifying potential partners is available from the British Consulate General in Casablanca.

May 2003 sees the start of Morocco Month in the UK, which will provide a valuable opportunity for British business to explore how they might be involved in developing Morocco as a tourism destination for the new century.