

# Morocco

## Tourism in the economy and outlook for recovery

Tourism is an important sector in the Moroccan economy, directly contributing MAD 82.1 billion or 7.1% of total GDP in 2019 and providing an estimated 565 000 jobs (5.0% of total employment). Tourism is generally a key source of foreign currency, with receipts representing 42% of service exports in 2019, but fell to 28% in 2020.

International tourism plays an important role, with 12.9 million international tourists in 2019. In 2020, international arrivals to Morocco decreased by 78.5% to 2.8 million. Travel receipts from international tourism fell to MAD 36.4 billion in 2020, 53.8% lower than in 2019. The tourism recovery in 2021 remained limited, with 3.7 million international tourists, 71% below 2019.

In 2019, there were 3.5 million domestic overnight visitors (tourists) in classified accommodation establishments. Domestic tourism fell by 55% in 2020, but this relatively smaller decrease compared to international tourism saw the domestic share of total nights in classified accommodation establishments increase to almost 50% in 2020, up from 31% pre-pandemic. Domestic tourism performed stronger in 2021, reaching 2.8 million overnight visitors (tourists) in classified accommodation establishments, 22% below the 2019 level.

Morocco projects a full tourism recovery to pre-pandemic levels by 2023.

## Tourism governance and funding

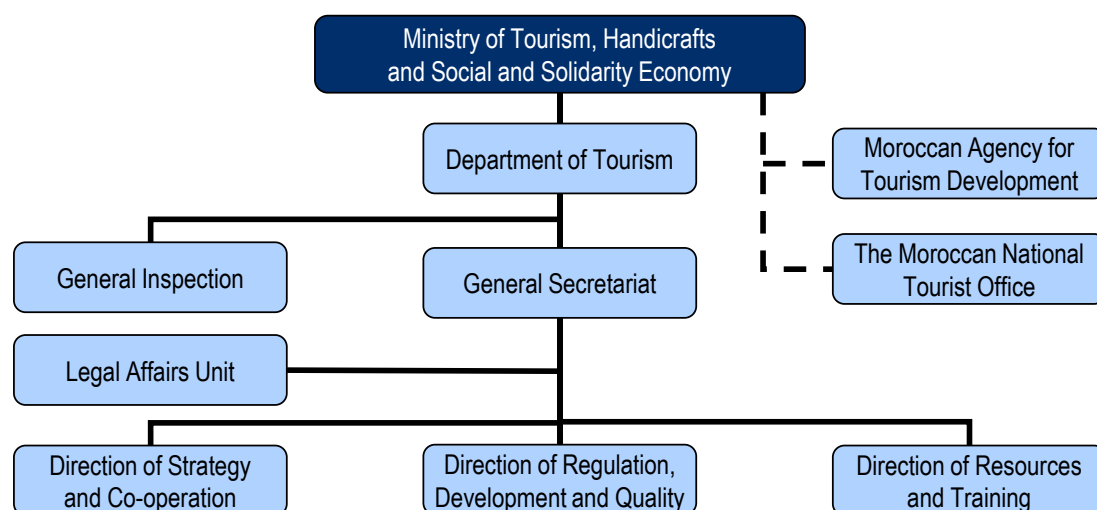
The Department of Tourism sits within the Ministry of Tourism, Handicrafts, and Social and Solidarity Economy and is responsible for developing and implementing government policy on tourism.

Morocco has adopted a framework of ‘advanced regionalisation’ as a new model of territorial governance. The framework aims to build a strong territorial administration through improved skills and resources. The Department of Tourism carries out missions at the national level. Decentralised services are responsible for overseeing the management of regional public services, implementation of public policies and participation in developing and delivering programmes and projects at the regional level. Decentralised services also ensure the execution of directives and decisions from national government authorities to which they report and carry out programmes and projects at the prefecture or provincial level.

The budget of the Department of Tourism for 2022 was MAD 680 million. It is split between the entities placed under the responsibility of the Department of Tourism:

- Central administration: MAD 125 million.
- Moroccan National Tourist Office: MAD 300 million.
- Moroccan Agency for Tourism Development: MAD 255 million.

## Morocco: Organisational chart of tourism bodies



Source: OECD, adapted from the Department of Tourism, 2022.

## Tourism policies and programmes

Tourism is a priority sector in Morocco, which benefited from the country's ten-year development strategies - Vision 2010 and Vision 2020 - aimed at supporting and boosting tourist activity while improving its impact on the country. However, the COVID-19 pandemic, which coincided with the expiry of Vision 2020, plunged the sector into crisis and reshaped its development potential.

Public authorities deployed numerous measures allowing specific support for the sector to limit the impact of the crisis, preserve the economy, and accelerate the recovery of the sector. Public and private actors have combined their efforts at national and regional levels by setting up a programme for the revival of the tourism sector over the period 2020-22. The programme aims to give a boost to the sector and breathe new life into its relaunch and transformation through three major objectives: i) preserve the economy and employment, ii) speed up the restart phase, and ii) lay the foundations for a sustainable transformation of the sector.

The programme includes 21 measures intended to position Morocco in the post-COVID-19 era by adapting to new market realities, anticipating changes in the consumption patterns of tourists and taking advantage of new opportunities. The action plan revolves around five strategic areas:

- Preservation of employment.
- Economic and financial support for the recovery.
- Stimulation of investment and transformation.
- Activation and strengthening of tourism demand.
- Cross-cutting measures such as training, governance, legal frameworks and digitisation.

Several actions have been implemented within the framework of the 2020-22 programme. Support was granted to employees of tourist companies and tourist guides through a monthly flat-rate allowance of MAD 2 000. An exemption from tax on additional remuneration of employees was also granted, in addition to establishing social protection for tourist guides. The payment of social security contributions by tourism businesses and the payment deadlines for specific debts were postponed. Three new guarantee mechanisms were put in place for businesses in the sector. A new law was adopted, allowing service providers to substitute reimbursements owed to their clients for credit notes. A partnership agreement was signed to create an "Inmaa Tourism" device to support and accelerate the development of tourism SMEs

in the Souss-Massa region (see box below). The “Welcome Safely” label was set up for tourist accommodation establishments to demonstrate compliance with the health and safety measures related to COVID-19.

Considering the persistence of the repercussions of the crisis linked to the COVID-19 pandemic and its uncertain horizon, a new emergency plan was also approved by Morocco in 2022 to release an envelope budget amounting to MAD 2 billion to provide the financial support needed to relaunch the sector. The new emergency plan is part of the continuity and consistency of the programme contract. All the actions are carried out to safeguard companies, avoid the massive destruction of jobs and set up a favourable environment for the revitalisation and revival of the sector.

The emergency plan proposes courses of action and concrete solutions to enable this sector to recover from the crisis through measures such as the extension of lump sum payments for employees in the tourism sector, deferrals of charges due to the Social Security Fund for the same employees, and a subsidy for the hotel sector of MAD 1 billion.

The Department of Tourism is also working on a set of measures as part of a global strategy that guarantees the development of the sector according to the variables and priorities identified through five main pillars:

- Conducting broad promotional campaigns to market tourist assets, particularly through tour operators, platforms and websites.
- Strengthening air transport by securing the greatest number of seats for tourists coming to Morocco, in partnership with Royal Air Maroc and foreign companies.
- Boosting tourism investment by prioritising incentives likely to attract investors and encourage the creation of SMEs in the tourism sector, particularly in the leisure and entertainment fields.
- Rehabilitating the tourist offer through a series of priorities which includes improving the quality of services and the diversification of the offer to promote the tourist experience in the country's different regions and improve the notoriety and competitiveness of Morocco as a destination.
- Emphasising the importance of the qualification of human resources and the creation of new employment opportunities, especially after the labour market crisis caused by COVID-19, which has led to a sharp decline in employment opportunities in the private sector.

### Supporting competitiveness and transformation of tourism MSMEs in Morocco

INMAA Tourism is a device dedicated to supporting competitiveness and the transformation of actors. It is a support mechanism for MSMEs aiming to improve their competitiveness and the quality of their services sustainably through general and unified assistance for tourist services and proper support focused on the specific issues of each business. This mechanism targets MSMEs operating in regulated trades (e.g. accommodation, distribution, catering) and trades and activities related to the tourism sector, such as entertainment or digital.

As part of the deployment of this global support mechanism for tourism SMEs, a pilot programme has been initiated in the Souss-Massa Region. A partnership agreement was initiated in 2021 with the Region of Souss-Massa to provide this mechanism with a budget of MAD 100 million shared between the region and the Moroccan Agency for Tourism Development with a target of reaching 150 SMEs. The programme intends to promote entrepreneurship by facilitating access to funding support, advice, and technical expertise.

## Statistical Profile

### Morocco: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	3 121	3 247	3 550	1 442	2 765
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	7 057	7 166	7 838	3 506	6 378
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	11 349	12 289	12 932	2 778	3 722
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
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
Nights in all types of accommodation	132 585	147 790	..	..	..
Hotels and similar establishments	15 046	16 866	17 406	3 470	2 818
Other collective establishments	26 861	30 953	..	..	..
Private accommodation	90 678	99 971	..	..	..
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	1 849	1 923	2 009	738	643
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	9 086	9 520	9 949	4 514	..
International travel receipts	7 494	7 774	8 187	3 848	..
International passenger transport receipts	1 592	1 746	1 762	666	..
<b>Outbound tourism</b>					
Total international expenditure	2 829	2 988	3 103	1 509	..
International travel expenditure	1 793	1 976	2 176	1 113	..
International passenger transport expenditure	1 036	1 011	926	396	..

.. Not available

Source: OECD Tourism Statistics (Database).


StatLink  <https://stat.link/v8pa46>

## Morocco: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2021	2017	2018	2019	2020	2021
<b>Total</b>	..	<b>532 000 e</b>	<b>550 000 e</b>	<b>565 000 e</b>	..	..
<b>Tourism industries</b>	<b>6 203</b>	<b>412 000 e</b>	<b>424 000 e</b>	<b>435 800 e</b>	..	..
Accommodation services for visitors	..	..	..	..	..	..
Hotels and similar establishments	4 549	135 000 e	140 000 e	144 000 e	..	..
Food and beverage serving industry	..	86 000 e	90 000 e	92 500 e	..	..
Passenger transport	..	36 000 e	37 000 e	38 000 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	1 654	23 000 e	24 000 e	24 600 e	..	..
Cultural industry	..	10 000 e	10 000 e	10 300 e	..	..
Sports and recreation industry	..	3 000 e	3 000 e	3 100 e	..	..
Retail trade of country-specific tourism characteristic goods	..	119 000 e	120 000 e	123 300 e	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	<b>120 000 e</b>	<b>126 000 e</b>	<b>129 200 e</b>	..	..

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/n96q8r>

## Morocco: Internal tourism consumption

Million MAD

	2014		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>32 000</b>	<b>73 508</b>	<b>105 508</b>
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
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/ncmdit>



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