

## **Moroccan Tourism Strategy: Its Repercussions on Sun and Beach Tourism in the Tangier-Tetouan Region**

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**ABSTRACT:** *The object of this work is to study the Moroccan tourism strategy and its impact on sun and beach tourism in the Tangier-Tetouan region. This study forms part of a more extensive research included in the Ibn Battouta project on sustainable tourism in the northern region of Morocco, financed by the Spanish Agency for International Development Cooperation (AECID) Two main conclusions have been drawn from this research: the tourism potential of the region and the Moroccan government's strong support for this sector. An important part of this support is related to sun and beach tourism as shown by the development of the 2020 Azur programme. The execution of these programmes could, in the near future, produce a great impact on some of the Mediterranean and Atlantic coastal areas.*

**Keywords:** *Coast, Morocco, Sun and beach tourism, Tangier-Tetouan region, Tourism management.*

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### **I. INTRODUCTION**

This article analyses the evolution of the Moroccan tourism strategy and its repercussions on sun and beach tourism in the country. The commitment of the Moroccan authorities to convert this country into a first class tourism destination is obvious from the different tourism programmes that have been approved [1]. The Moroccan market was traditionally based on the imperial cities but, over the last few years this has been extended to include others like sun and beach, rural and cultural tourism, etc. [2]. Despite the quantitative and qualitative advances of tourism in Moroccan economy, the image that the western tourist has of Morocco as an unsafe destination, something which does not correspond to the reality of contemporary Moroccan society has still to be overcome.

This work is based on the hypothesis that the tourism strategies developed in this country are centred on Sun and Beach tourism using a poorly sustainable model. Two objectives have been proposed to demonstrate this hypothesis: the analysis of bathing tourism in the Tangier-Tetouan region and the diagnosis of the tourism programmes developed during the twenty-first century.

To this end the work has been organised in two main parts. The first carries out an in depth analysis of the evolution of sun and beach tourism in the Tangier-Tetouan region, giving details of some examples of the north-east Cabot Negro coastal area, and its territorial repercussions. The second part centres on describing and evaluating the documents *Vision 2010* and *Vision 2020*, and their inclusion in the Private-Public Partnership Agreements signed by the Tangier-Tetouan Regional Government[3].

Before describing the methodology used to achieve these objectives, it should be mentioned that there have been difficulties in obtaining up-to-date and reliable public information. There have been many different sources of information: primary, obtained from field work and secondary, mainly obtained from the Moroccan Tourism Observatory, the World Tourism Organisation and the Moroccan Ministry of Tourism[4]. On the other hand, the working method adopted has consisted, in the first place, of gathering bibliographic and statistical information and, secondly, by the qualitative and quantitative analysis of the information from the fieldwork carried out between 2008 and 2014, as part of the Ibn Battouta projects carried out by the Spanish Agency for International Development Cooperation (AECID) and the CTI of the European Union Poctefex programme (Cross border centre for the innovation and technology of tourism and leisure Andalusia-Northern Morocco approved in 2014). Thirdly a critical analysis of the different planning documents related to programmes *Vision 2010* and *Vision 2020* has been carried out.

During the last decade tourism has become an omnipresent element in this culture, with enormous possibilities for development, always supposing that this is carried out in a sustainable manner and that the existing resources are not overexploited [5]. There are, in fact, very good reasons to affirm the great potential of Morocco within the southern Mediterranean tourism sector, although it has still to be developed, especially if it is considered as a special, differentiated and quality offer [6].

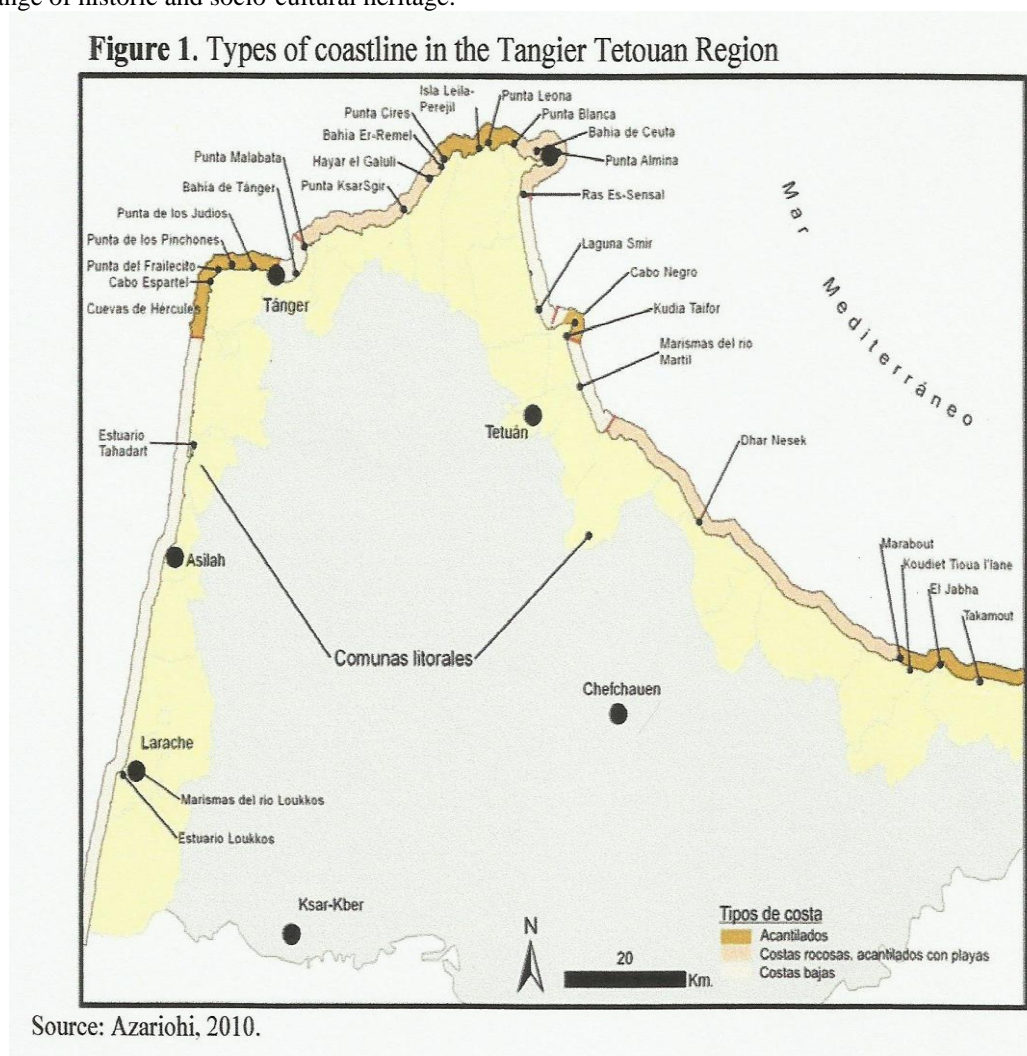
Currently, both the political authorities responsible for the tourism sector and entrepreneurs are trying to promote tourism in Morocco characterised by new formulas aimed at enjoying authentic new experiences,

where culture and the natural environment play a major role [7]. This basic, traditional offer should be backed up and developed with another one to complement it, currently inexistent, in order to help the tourist to choose this destination.

## II. SUN AND BEACH TOURISM IN THE TANGIER-TETOUAN REGION

The tourist activity in the Tangier-Tetouan region (TTR) is extremely important for its economy. The regional tourism industry was created during the second half of the twentieth century, the majority of the TTR hotels being aimed at mass sun and beach tourism and to cover the needs of the urban tourism of the two big cities of Tangier and Tetouan.

The privileged geographical situation of this region makes it an ideal area to offer sun and beach tourism. Its 375 km of coastline are distributed between the Atlantic and the Mediterranean. Factors which have favoured tourist attraction are its white sand beaches, alternating with areas of cliffs, its mild climate, with an average temperature of between 14 and 18 degrees, all year round, an average annual rainfall of 800 mm and a wide range of historic and socio-cultural heritage.



**Figure 1.** Types of coastline in the Tangier Tetouan Region

The mineral and granulometric characteristics are very positive for bathing. The intertidal slope and the stability of the back of the beach mean that this zone is suitable for the installation of permanent services. The stability of the beach favours bathing throughout the year. Wave conditions are not dangerous for bathing (fig. 1)[8].

These territorial characteristics justify the regional and national authorities' commitment to this type of tourism. This means that the 29 zones in the Tangier-Tetouan region declared by the Ministry of Territory Planning, Water and Environment as areas of touristic interest are situated on the coast from Larache to Chefchauen[9] (fig. 2).

Figure 2. Areas of touristic interest in the TTR.



Source: Haut commissariat au Plan and the Moroccan Tourism Observatory, 2008

Figure 2. Areas of touristic interest in the TTR

The region possesses 16.8% of the hotels in the country, without taking into account their category, and 14.7% of its hotel accommodation capacity. These establishments are concentrated in Tangier and Tetouan, distributed between the two main urban areas and the most demanded coastal touristic areas.

It is possible to affirm that sun and beach tourism accounts for almost 95% of the hotel accommodation available in the Region. In effect, except for the 566 beds offered by hotels in Chefchaouen, practically all the region's offer is situated on the first 20 km of coast.

By observing the data by prefectures and provinces it is obvious that the hotel accommodation offer in Larache, there are only establishments with one and two stars, is insufficient. It is also necessary to point out its scarce presence in the province of Chefchaouen, an area with great possibilities for tourism, especially all those activities aimed at the cultural and nature offer, as well as having an extensive coastline, although situated at some distance from the provincial capital.

More than 50% of all the hotels are located in Tangier, increasing to 86% if we include Tetouan. On the contrary, the number of hotels in Larache does not reach 5% of those in the region as a whole. It is worth mentioning that there are only three 5 star hotels in the entire region, these being situated in the provinces of Tangier and Tetouan

An analysis of the number beds confirms the above data. 64% of the total is concentrated in Tangier. Beds in 5 star hotels represent slightly more than 11% of the total and are concentrated in Tangier and Tetouan; mainly in Tangier which represents more than 76% of the total of beds in 5 star hotels (table 1).

	1 star	2 stars	3 stars	4 stars	5 stars	Totals	Beds per thousand inhabitants
TTR	1,276	1,733	4,240	2,226	998	14,331	5.3

Source: Ministry of Tourism and Handicraft, 2014.

Table 1. Number of Beds in the TTR classified by hotel category

Chefchaouen stands out for its offer of middle range hotels. More than 50% of all accommodation is offered in the province of Tangier and, as mentioned in the previous paragraph, almost 77% of 5 star beds and above are in the same province. On the other hand, by observing the relation between the offer of beds and the population, it is possible to detect that the most positive figures coincide with Tangier and Tetouan whose values exceed the regional average (table 2).

	Chefchaouen	Larache	Tangier	Tetouan	Total region
<b>1 Star</b>	84	36	452	312	884
<b>2 Stars</b>	230	128	815	288	1,461
<b>3 Stars</b>	184	-	2,897	784	3,865
<b>4 Stars</b>	68	-	740	514	1,322
<b>5 Stars</b>	-	-	760	238	998
<b>Total</b>	566	164	5,664	2,136	8,530
<b>Beds/population</b>	1.08	0.35	7.43	4.13	3.45

Source: Haut commissariat au Plan and the Moroccan Tourism Observatory, 2012.

**Table 2.** Number of beds by type of hotel in provinces and prefectures

It is also of interest to analyse the leisure facilities associated with the hotel accommodation offer. There are currently two golf courses included in this type of facility: the Tangier Royal Golf Club, on the Atlantic coast, only a few kilometres from the city of Tangier, and the Cabo Negro Golf Club on the Mediterranean coast in the vicinity of the cities of Tetouan and Martil. There are also seven projects for new golf courses associated with residential installations, all of which are situated in the vicinity of beaches or coastal leisure areas. None of them had been completed by June 2014.

Bearing in mind the hotel accommodation capacity of the Region, which represents 8.7% of that of the country as a whole, in 2009 the TTR registered 6.9 % of the domestic overnight stays. Of the three large administrative units it is the prefecture of Tangier which grows as regards overnight stays during the first decade of the twenty-first century, while the provinces (*wilaya*) of Tetouan and Chefchaouen lose ground.

On the other hand, the occupancy rates of all higher category hotels have been improving over the last decade. The overall occupancy rate is 54%, below the average of that of four and five star hotels, as can be observed in figure 3.



Source: Haut commissariat au Plan and the Moroccan Tourism Observatory, 2008.

**Figure 3.** Hotel occupancy rates in the Tangier-Tetouan region

If the study of the behaviour of the demand in the region's two most important cities is taken into account we obtain significant results. In the case of Tangier there has been a 30% increase in overnight stays over the last decade, although a small decrease has been detected over the last year. The concentration of tourists during the summer months has decreased to the extent that it did not reach 40% in 2011, although the occupancy rates during this season are the highest throughout the entire year, almost 75% during the month of highest occupancy. These figures demonstrate that the region maintains a strong seasonality marked by bathing tourism.

City	Variables	2001	2010	2011
<b>Tangier</b>	Total overnight stays	483,213	630,131	629,010
	% of total overnight stays in summer months over the total	47.5	38.0	39.4
	Occupancy rate	44	53	51
	Occupancy rate during the summer (month of highest occupancy)	75 (August)	75 (July)	77 (July)
<b>Tetouan</b>	Total overnight stays	324,945	260,386	245,938
	% of total overnight stays in summer months	62.1	58.9	61.8
	Occupancy rate	40	34	35
	Occupancy rate during the summer (month of highest occupancy)	90 (August)	65 (July)	69 (July)

Source: Moroccan Tourism Observatory, 2011.

**Table 3.** Characteristics of the overnight stays and rates of occupancy in Tangier and Tetouan

In the case of the city of Tetouan the decrease in overnight stays during the last decade is more notable, almost 24%. The concentration of visitors during the summer is also higher. In 2011 this reached more than 60% of the overnight stays for the entire year. The occupancy rate, 69% in 2011, during the summer months, is much above the average.

Finally, an analysis of the overnight stays in the two cities, by nationality of the tourist, detects the following substantial differences. Moroccan visitors predominate in both cities, varying between 55% for Tangier and 61% for Tetouan, but the differences are marked by the nationality situated in second place which, in the case of Tangier is Spanish, justified, among other reasons by the maritime connection between the two countries and, in the case of Tetouan, the French. In both cases it is also worthy mentioning the important presence of citizens from other European countries like the United Kingdom, Italy, Portugal, Belgium and Germany [10].

The region has diversified its tourism, progressing towards the bathing resort and its variants: the spa and hydrotherapy, which is an option to complete the sun and beach offer, thus avoiding seasonality. Although the offer of hotel accommodation in the region has increased over the last few years, especially in coastal areas, the Moroccan government is aware that there is a deficit in the country as a whole and, above all, in the Tangier-Tetouan region. The tourism plans analysed in the following section foresee an increase in hotel beds which will multiply the country's current offer by five.

The touristic potentials of the Tangier-Tetouan Region are comparable with those of Andalusia (Spain) but, however, the exploitation of its resources is minimal. According to Barroso and Flores [11] the competitiveness of Andalusia is due to its important productive factors (natural, human and economic resources), although, according to Porter [12] success is usually related to how these elements are used and managed. It is evident that the Moroccan tourism offer must improve in quantity but, above all, in quality. A survey carried out in 2010 [13] shows that more than 30% of those interviewed had a negative opinion regarding the cleanliness of the beaches but, on the other hand, over 80 % consider that Morocco has exceeded their expectations, almost 20% being very satisfied with what they have found in the country. All of this means that the Tangier-Tetouan Region has potential for touristic activity which should be adequately planned to reduce the possible environmental impacts that this might cause and which, in some cases, has already done so.

Touristic activity also produces important territorial impacts in the Tangier-Tetouan Region. The beach, the basic element for bathing tourism, is an extremely fragile and sensitive resource. The process of coastalisation, common to all coastal countries, has become evident in the Tangier-Tetouan Region over the last decade. All of this, together with property developments, mainly concentrated in the area from Martil to Castillejo on the Mediterranean coast, and from the city of Tangiers to the Tangier-Med Port, on the Atlantic coast, has caused an important impact on the landscape and territory.

According to Bello *et al.*[14] "The tourist facilities which have been built tend towards a certain amount of territorial isolation, given that they are nearer to the beaches but away from the pre-existing urban areas. This means that, amongst other considerations, they must be provided with the necessary equipment and infrastructures which, moreover, will only be used at full capacity one month per year".

At the same time, the creation, over the last few years, of road infrastructures parallel to the coast along all the area between Ceuta and Tetouan and between Castillejo and Tangier has favoured residential and hotel developments. Apart from the complete destruction of pre-existing ecosystems, the most evident effect of the physical occupation of this territory is the alteration of coastal dynamics [15]. These same authors proposed the classification of the impacts resulting from tourism activity shown in table 4.

Actions	Impacts
Physical occupation of maritime and terrestrial territory	Destruction of pre-existing ecosystems
	Homogenization of the landscape
	Variation of coastal dynamics
	Creation of artificial barriers
	Privatization of public spaces
Change of the landscape	Interruption of horizontal lines
	Variation and substitution of the native landscape
Increase of access to the ecosystem	Deterioration of vegetation
Dredging	Disappearance of the ecosystem
	Variation of coastal dynamics
Dumping of waste	Decrease of water quality
	Increase of water turbidity
	Increase of nutrients in the water
Construction of facilities for services seasonal services	Uncontrolled dumping of residues
	Maintenance expenses throughout the year

Source: adapted from Bello *et al.*, 2006.

**Table 4.** Impacts observed along the coast line of the Tangier-Tetouan region

Over the last decades, the tourism image of the region has changed with no clear objective, including a new, ill defined proposal of a combination of cultural and bathing tourism. Despite the improvement of the hotel accommodation offer and tourist services the tourism sector in the region continues to maintain low levels of sustainability within the framework of the traditional sun and beach tourism model.

### **III. POLICY FOR THE DEVELOPMENT OF TOURISM IN NORTHERN MOROCCO**

#### **3.1 History of Moroccan tourism policy**

Morocco has chosen tourism as the strategic sector to achieve socioeconomic development. This line of work began in 1965 when the Ministry of Tourism opted for the development the sector. Since then, the administration has regulated and organised the different variants of the sector.

Within the major international circuits, Moroccan tourism has traditionally been limited to culture, based on the classic routes such as Marrakesh-Fez-Meknes (known as the imperial cities), combined with adventure tourism in the desert, the oases to the south of the country and the Atlas mountains. However, until the twenty-first century the Moroccan authorities had ignored the potential of both its Atlantic and Mediterranean coasts.

An exception to this policy, worth mentioning, is the case of the city of Agadir which was restored during the sixties after suffering an earthquake. It is from then on when they opt to convert it into an international tourist destination (mostly of German and British origin) sun and beach being its main appeal.

#### **3.2 Strategic planning**

##### **3.2.1 Plan vision 2010**

Aware of the importance of the tourism sector as the priority axis for the development of Moroccan economy, at the beginning of the twenty-first century the authorities launched different strategies to convert this activity into an important pillar of the country's economy [16]. 2001 marked a turning point in the tourism policy with the elaboration of a strategic plan called "Vision 2010". This is an ambitious plan reached by an understanding between the government and professionals from the sector, with the aim of promoting Moroccan tourism based on six key areas of intervention [17]:

1. On the product, by tripling the accommodation capacity, 75% of which is for coastal areas and 25% for cultural tourism destinations.
2. On transport, by creating new infrastructures (roads, ports and airports) and improving those already in existence.
3. On promotion and marketing, by redefining the destination's dissemination and communication strategies.
4. On the management of the public sector, by creating a consultative body and facilitating coordination between public and private sectors.
5. On training, by placing emphasis on the qualification of the personnel working in the sector.
6. On the context of tourism, by improving the services and equipment associated with the activity.

These basic axes are manifested in different objectives: to achieve 10 million tourists, to host 7 million international tourists, to increase the accommodation capacity to 230,000 beds, the creation of 6 new bathing resorts on the coast, to reach an annual income of 80 million dirhams, the creation of 600,000 new direct jobs, etc. The structure of these proposals is organised within different programmes, among which we can highlight due to their importance: Azur, Mada'In, Biladi and Renovotel.

The Plan Azur was the focal point of Moroccan strategic planning during the first decade of the twenty-first century. The aim of this project was the collaboration between the public and private sectors for the construction of new bathing resorts on the Moroccan Atlantic and Mediterranean coasts. It was embodied by the planning of 6 actions, only two of which had been completed by the end of 2013 (table 5).

<b>Destination</b>	<b>Saidia</b>	<b>Tagahazout</b>	<b>Mazagan</b>	<b>Lixux</b>	<b>Mogador</b>	<b>Playa Blanca</b>
<b>Foreseen investor</b>	Fadesa	Colony Capital Satocan	Kerzner CDG Somed/Mamda	Thomas/Piron	Thomas/Piron	Fadesa
<b>Bed capacity</b>	30,000	21,000	7,600	12,000	10,600	30,000
<b>Planned date for the start of the works</b>	April 2004	January 2007	June 2007	February 2006	June 2006	September 2008
<b>Investment</b>	952 Mill. €	1,059 Mill. €	538 Mill. €	447 Mill. €	415 Mill. €	1000 Mill. €
<b>Expected opening</b>	January 2009	December 2009	End 2009	2010	End 2009	2012
<b>Open in December 2013</b>	Yes	No	Yes	No	No	No

Source: Own compilation based on data from the Ministry of Tourism and Handicraft and the Moroccan Tourism Observatory, 2008.

**Table 5.** Tourism development programmes included in the Plan Azur

The second pillar of the plan Vision 2010, in parallel to the development of the Plan Azur, was the Plan Mada'In, whose start-up depended on the Regional Tourism Development Plans (RTDP), with the joint participation of different institutions: the central and regional governments, communities and regional tourist boards. Its main objective was to revive and raise awareness of cultural tourism in Morocco. Therefore, the aim was to promote other destinations beyond the traditional ones in areas with many and attractive resources with possibilities for the development of tourism. Outstanding among these destinations are: Agadir, Tangier, Tetouan, Fez, Ouarzazate/Zagora and Casablanca.

Programme	New Tourist Areas	Date foreseen
RTDP Fez	Ouisslane/Oued Fez/ Medina of Fez	2014
RTDP Casablanca	City Centre/Marina/ Restoration of the Medina	2012
RTDP Agadir	Founty/Taghazout/ Bensergao	2015
RTDP Tangier	Ghandouri/Tangier City Centre, Reconversion of the Port, cultural facilities	2012

Source: Moroccan Tourism Observatory, 2011.

**Table 6.** Plan Mada'In: RTDP

On the other hand, the aim of the Plan Biladi was to promote domestic tourism, which led to the planning of the construction of the necessary infrastructures in tourism resorts or complexes chosen according to criteria of occupation, accessibility, proximity and regional balance. The plan was carried out in eight regions, Grand Casablanca (Sidi Rahal), Marrakesh-Tensift-Al Haouz, Tangier-Tetouan (Assilah, KaaSrass), Sous-Massa-Draâ (Agadir/Immiwadar, in the vicinity of Taghazout), Rabat-Salé-Gharb (MoulayBousselham), Doukkala-Abda (Azemmour/LallaAïcha El Bahria), Fez-Meknes-Ifrane (Ifrane) and Oriental (Lazzanane) [18]. At the end of 2013 the execution of the planned activities had been very limited in all the territories involved.

Finally, the intention of the Plan Renovotel was to renovate and improve the region's hotel network. The transformation of the hotel network is carried out through financial aid from soft loans provided by private banks.

In short, the Strategic Plan Vision 2010 has had limited success, both as regards the achievements of the objectives set and the territorial impact of the actions carried out. Morocco possesses significant natural resources and a rich cultural heritage [19]. However, the Plan Azur opted for rapid, massive, environmentally aggressive developmentalism. This development repeats the traditional sun and beach model, whose main objective was to reach 10 million tourists in 2010, a figure which would practically duplicate the number of tourists who visited Morocco in 2001. Although the short term economic consequences have been positive for the north of Morocco, the region still lacks a real policy for sustainable tourism which, in the long term, may have negative environmental consequences [20].

### 3.2.2 Vision 2020

The Plan Vision 2020 was presented in Marrakesh in 2010 as a continuation of Vision 2010 already commented above. The new plan recognises the lack of fulfilment of some of the objectives set out in its predecessor and the renewed commitment of the Moroccan government to the tourism sector as the mainspring of the country's economic development. Various reasons explain why the goals set were not achieved. In some cases this can be explained by internal factors (lack of organisation capacity, political will, etc.) and, in others, by external variables (economic crisis, lack of foreign investors, international instability, etc.). As in the case of the previous plan the objectives which have been set are very ambitious: to double the national accommodation capacity and the arrival of tourists and to triple the number of domestic travellers. In short, the idea is to situate the country among the twenty leading world tourist destinations.

On the economic front, the plan proposes to reach an income of 140,000 million dirhams (16 million dollars) and to generate 470,000 new jobs, both direct and indirect. To this end, as in the previous plan, the Moroccan government has bet on a public-private partnership in order to strengthen the collaborative structures between both. Four lines of action have been taken into account: reinforce tourism regionalisation, diversify the offer, guarantee financing and promote quality training.

The Moroccan government has defined eight tourism regions specifying, in each case, the type of tourism to be achieved after the plan has been carried out: Sahara SoussAtlantique (desert and sun and beach tourism), MarraquechAtlantique (traditional/cultural tourism), Centre Atlantique (business tourism), Atlas et vallées (sustainable tourism and ecotourism), Grand SudAtlantique (Sun and beach tourism), Cap Nord (Cultural and sun and beach tourism), Maroc Centre (Cultural tourism) and MarocMéditerranée (Sun and beach and nature tourism). As regards the investment, the plan contemplates a public injection of 15,000 million dirhams (1,700 million dollars) and international fundraising, mainly from Arab countries (Kuwait, United Arab Emirates, Bahrain, etc.) [21].

Finally, and following the lines already commenced in the previous plan, there exists a decided commitment to training on different educational levels, with emphasis on qualifications to achieve a sustainable tourism model.

A series of programmes, following along the lines of those included in Vision 2010, have been proposed to achieve these objectives. These are: Azur 2020, Biladi, Patrimony and Heritage Programme, Green/Eco/ Sustainable Development Programme, Events, Sport & Leisure Programme and High Value Added Niche Programme [22]. Other lines of action such as the dissemination and promotion of the destination (Programme Visit Morocco) and the creation and improvement of transport infrastructures and equipment are being carried out in parallel to these strategic initiatives.

It can, in theory, be confirmed that this plan is trying to achieve territorial integration, in accordance with the characteristics of each region, as well as being concerned for guaranteeing sustainable development [23]. Specific projects show an excessive commitment to bathing tourism, thus questioning the achievement of the goals of sustainability which had been set. In each region these actions are determined in Private-Public Partnership Agreements which determine those to be carried out, the financial distribution by areas and institutions and the calendar of the interventions [24]. Below is an analysis of the Tangier-Tetouan Region (Cap Nord).

### 3.3 The Tangier-Tetouan Region Private-Public Partnership Agreement (TTRPPP)

The overall objectives of the Strategic Plan Vision 2010 in this region are based on the following axes: promotion of cultural and natural products, development of the business and congress tourism offer and the consolidation of the beach offer along the Tangier-Tetouan coast line. The expectation of the plan is to reach the figure of 2.77 million tourists in 2020 and to increase the hotel accommodation capacity to 40,769 beds. The TTRPPP identifies the types of tourist who may be attracted by the area's natural and cultural resources: "luxury backpackers" and "conformist adventurers" [25].

The projects and actions included in the 6 major programmes of Vision 2020 are proposed to achieve these objectives. Azur 2020, Biladi, Patrimony and Heritage Programme, Green/Eco/ Sustainable Development Programme, Events, Sport & Leisure Programme and High Value Added Niche Programme. In all, a total of 127 projects, 25 classified as first and 102 of secondary importance have been planned. These are distributed between the 6 programmes as can be seen in the following table:

Programme	No. of projects	% of total projects	Investment in millions of dirhams	% of total projects
Azur 2020,	7	5.5	7,770	53.8
Biladi,	2	1.6	1,150	7.9
Cultural Heritage Programme	56	44.1	1,685.07	11.7
Sustainable Development Programme	30	23.6	1,394.22	9.7
Leisure and Events Programme	29	22.8	1,911.9	13.2
New Niche Programme	1	0.8	500	3.5
Others	2	1.6	32.9	0.2
TOTAL	127	100	14,444	100

Source: Own compilation based on the Tangier-Tetouan Region Private-Public Partnership Agreement 2020, 2012.

**Table 7.** Number of projects and investment by programme

The analysis of Table 7 clearly demonstrates that the Moroccan government is committed to bathing tourism in the region. 53.8% of the planned investments are dedicated to projects included in the Plan Azur. But not only the projects included in this plan are situated on the coastal area. The main action included in the Events and Leisure Programme is the transformation of the port of Tangier into a leisure and commercial area, including a peripheral road that will communicate the port with the upper area of the medina. The three zones planned as coastal tourism resorts are Tamuda Bay, Lixus and Al Houara, within a time frame from 2012 to 2019. In the same way, one of the planned actions included in the sustainable development programme is the project for the conservation of the Asilah beach.

The second big bet on the region included in the Plan Vision 2020 is cultural tourism. The planned investment is over 1,600 million dirhams, which means more than 11% of the total budgeted amount, and is mainly destined for the medinas of Tangier, Tetouan and Asilah. The idea, in all three cases, is to create circuits and interpretation centres, the restoration of monuments and emblematic squares and incentives for the increase of the tourism offer of accommodation with charm.

The analysis of the geographical distribution of the investments shows that Tangier/Asilah is the most benefited territory. Almost 45% of all the planned investments are focused on this area. The provinces of Larache and Tetouan occupy the next place as regards the planned financing. It should also be pointed out that



90% of the total investments must be from private financing and less than 10% from the different tourism related administrations.

Province	No. of projects	% of total projects	Investment in millions of dirhams	% of total projects
Tangier/Asilah	35	27.6	6,389.87	44.2
Tetouan	2	1.6	1688.60	11,7
Chefchaouen	56	44,1	244,20	1.7
Larache	30	23.6	3735.62	25.9
Ouezzane	29	22.8	402.90	2.8
M'diq-Fnideq	1	0.8	1882.9	13.0
Fahs Anjra	2	1.6	30	0.2
Region	1		70	0.5
TOTAL	127	100	14,444	100

Own compilation based on the Tangier-Tetouan Region Private-Public Partnership Agreement 2020, 2012.

**Table 8.** Geographical distribution of the investments foreseen in Plan *Vision 2020*

#### IV. CONCLUSIONS

Based on the documents and data analysed, the sun and beach tourism model being established in Morocco and, more specifically in the Tangier-Tetouan Region is questionable. According to Traspederne [26] "the Moroccans see themselves reflected in the Costa del Sol (Andalusia, Spain), which is the main model for current tourism development on the Moroccan coast". This means that the projected model for development is based on an unreasonable use of coastal resources which implies the degradation the territorial landscape. Over the last few years, excessive property development has modified the coasts in this region. This mainly affects areas between Martil and Castillejo and those between the new Tangier-Med port and the city of Tangier. The city of Tangier's "port ville" itself is being transformed into a macro project which could cause problems for the environment and patrimony. The poor state of some of the urban beaches, with inadequate water quality, the lack of green areas, problems with residues and dirt, and the erosion of the coastline, are some of the problems suffered by these coasts. Despite all of this there are still some areas in the region that can be qualified as semi-natural and which must be protected from excessive property development. Given the construction crisis in their own countries, many companies, especially French and Spanish (FADESA, MIXTA ÁFRICA, FONAMENTS SOLIDS, URBAS) [27], have put their eyes on these spaces. This circumstance, together with the exponential growth of the tourism demand in this territory, converts the Moroccan coast and, more specifically, that between Tangier and Tetouan, into an area targeted for many development projects[28].

The conditions that will favour the future development of the sun and beach tourism sector in the Tangier-Tetouan Region are:

1. Adequate natural resources (extensive virgin beaches, beaches with the appropriate grain size, natural landscapes, etc.).
2. The right climatic conditions (a high average temperature, rainfall concentrated in some months, many hours of sunshine).
3. Political will to promote tourism in the region, laid out in a series of tourism programmes (Plan Vision 2020).
4. The economic and real estate crisis in European countries.
5. Economic conditions (land prices, low labour costs, etc.) which facilitate foreign investment.
6. The incipient image of Morocco as a sun and beach destination.

There are also elements which threaten the development of touristic activity in the region. These aspects must be taken into account to guarantee the growth of the sector:

1. The image that westerners have of insecurity in Arab countries due to culture shock.
2. The sociological characteristics of the Moroccans are sometimes at odds with the behaviour of sun and beach tourists.
3. The quality and control of some tourism services and equipment.
4. The deficient management of urban waste.

The fact that the hotel infrastructure is concentrated in the vicinity of big cities (Tangier and Tetouan) has made it possible to maintain the physical and natural characteristics of its coastline although, over the last few years, important urban development has taken place on part of the same. This means that it is necessary to carry out an integral management of the region's hotel capacity and to rationalise the number of new constructions. The impact of the three resorts planned in Vision 2020 (Al Houara, Tamuda Bay and Lixus) may have on the region's coastal ecosystem is a cause for alarm.

Finally, attention should be paid to improving the quality of communication infrastructures, the diagnosis of the weak and strong points of the Region's tourism offer, improvement of its tourist image, the promotion of other types of tourism (urban, cultural, historical, rural, sports, etc.) to complement sun and beach. Summing up, to reinforce the touristic identity of the Tangier-Tetouan Region as a unique produce [29]. Create a TTR tourism brand and support the specialisation of its beaches (urban-touristic beach, natural beach, landscape beach), thus diversifying the offer. All of which will make it possible to reduce the seasonality in tourism and increase the area's competitiveness.

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