Vision 2020 | A Strategy for Tourism Development
Sustainable Tourism Monitoring Framework

Pilot Project

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I- Global Tourism background in Morocco

II- ‘Vision 2020’: Ambitions, Solid foundations, and strategic dispositions

III- Focus on Sustainability, a challenge that needs to be taken up
   a. Approach adopted
   b. Formalizing the scoreboard for monitoring sustainable tourism indicators
Vision 2010

- Moroccan tourism’s international achievement: ranked 25th worldwide by the end of 2010

- In the Moroccan economy: Tourism is among the top foreign exchange earners, the 2nd biggest contributor to GDP, and the 2nd biggest job creator

Vision 2020

To raise Morocco, by 2020, to become one of the world’s top 20 tourist destinations and a model of sustainability in the mediterranean destinations

OBJECTIVES IN FIGURES

Doubling the size of the sector
- 200,000 new beds
- Double touristic arrivals
- Triple domestic trips

2nd economic sector:
- 470,000 new direct jobs
- Double touristic receipts to reach 140 billion DHs
- 2 additional points to the touristic GDP
II- The strategy ‘Vision 2020’: Ambitions, solid foundations, strategic dispositions

a) A territory-based tourism policy of all the regions of Morocco: Introducing the 8 tourist territories (destinations)

b) A new institutional framework for a dynamic regulation

To ensure the implementation of the 2020 Vision and strengthen the institutional legitimacy of an industry as multi-functional as tourism, a national steering instance, involving the state, regions and the private sector in a renewed partnership, will be defined:
«The High Authority for Tourism.»

Developing 8 touristic territorial agencies to be in charge of the development of tourism at the local level

c) An integrated approach of tourism sustainability

To promote a specifically Moroccan model of sustainable tourism, 3 challenges must be met:

1- Optimization of the natural/environmental resources
2- Respect the authenticity and the identity of the local populations
3- Making a fair distribution of the revenues of tourism in the whole country

> 6 STRUCTURING PROGRAMS for a diversified portfolio of products, are build around culture, seaside and nature, with sustainability in the background and supplemented with programs centered on certain high added value niches.

Azur 2020; Green / Sustainable Development; Culture & Heritage; Entertainment, Sports & Leisure; Business, Health & Wellness; Domestic Tourism - Biladi
III - Focus on Sustainability, a challenge that needs to be taken up.

An integrated program of sustainable tourism development

To implement the ambition of sustainability which is at the heart of the strategy, an integrated scheme will be developed to cover the different dimensions of tourism development: management, monitoring, developing and implementing regulations.
III - Focus on Sustainability, a challenge that needs to be taken up.

An integrated program of sustainable tourism development

**SUSTAINABILITY MONITORING MECHANISM**

To develop and collect a specific set of indicators of sustainability performances to measure the impact of the industry on the environment (on the national level and concerning the most vulnerable sites).

**REINFORCEMENT OF THE ENVIRONMENTAL REGULATIONS**

**INCENTIVES**

**TRAINING AND RAISING AWARENESS PROGRAMME**
III - Indicators of sustainability in Tourism

Sustainability monitoring device: Integrated mechanism for the collection and production of indicators for monitoring sustainability at multiple scales (national, regional and unitary).

Targets:

STEERAGE and ANALYTICAL MONITORING of SUSTAINABILITY

Allow the management of tourism sustainability to implement the strategy of sustainable tourism, the Ministry and the tourism industry need:
- An effective vision of dimensions that should be given top priority;
- to measure the impact of the implemented actions;
- Objective assessment of sustainability at each tourism destination.

COMMUNICATION

Ensure the visibility of sustainable tourism strategy and position Morocco as a major tourism destination, highly differentiated within the Mediterranean basin, by approaching international prescribers and targeting segments / markets that are sensitive to the issues of sustainability.
III - Indicators of sustainability in Tourism

**METHODOLOGICAL APPROACH**

- **a** Identify sustainability criteria
  - Environmental Pillar
  - Socio Economic Pillar
  - Social/cultural pillar

- **b** Define the objectives of the monitoring device

- **c** Defining the structuring dimensions of sustainability
  - **ANALYSING THE LIFE CYCLE PRODUCT**
  - **TOURISTIC EXPERIENCE**

**SUMMARY OF THE STRUCTURING DIMENSIONS OF SUSTAINABILITY**

- Tourism pressures on the natural resources
- Efficiency in the use of the water and energy
- Authenticity of the tourism experience and tourist satisfaction
- Tourism pressures on the host communities
- Participation of tourism in promoting tangible and intangible heritage and natural resources
- Engagement of the stakeholders in sustainable approaches/social responsibility
- Tourism contribution to the local economy and employment development

**DEFINITION AND SELECTION OF THE INDICATORS**

- The degree of relevance of monitoring indicators have been tested from different dimensions

- **FEASIBILITY**
  - Availability of information
  - Ease of implementation (time and resources needed, construction, mobilization)

- **IMPACT**
  - Comparability
  - Clarity and importance of the perception among stakeholders (tourists, public, etc...)
### III - Indicators of sustainability in Tourism

#### SUSTAINABILITY STRUCTURING DIMENSIONS 1/2

<table>
<thead>
<tr>
<th>Environmental Pillar</th>
<th>Socio Economic Pillar</th>
<th>Social/Cultural Pillar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pressure on natural areas (sites)</td>
<td>Pressures on the local population (nuisance, tourist density, etc.)</td>
<td>Participation of tourism in the development of the local economy and job creation in the region</td>
</tr>
<tr>
<td>Pressure on resources</td>
<td>Local population access to the equipments/ infrastructure and tourist attractions</td>
<td>Employing local people in the construction of tourism assets</td>
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<tr>
<td>Exposure to climate risks (floods)</td>
<td>Integration of buildings in the urban local style</td>
<td>Existence of sustainable development offers (labels, specialized travel agencies, etc.)</td>
</tr>
<tr>
<td>Take into consideration alternative resources when designing and constructing assets</td>
<td>Nuisances resulting from constructions</td>
<td>Promotion of Morocco as a green destination to institutional and private sector (TO, etc.)</td>
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<td>Creation of green spaces</td>
<td>Stability and quality of tourism jobs</td>
<td></td>
</tr>
<tr>
<td>Efficiency of resource consumption</td>
<td>Contribution of tourism to the renovation of cultural monuments</td>
<td></td>
</tr>
<tr>
<td>Level of use of alternative resources</td>
<td>Contribution of tourism to the valuation of intangible heritage (local culture, gastronomy, etc.)</td>
<td></td>
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<tr>
<td>Efficiency in the management of releases and wastes</td>
<td></td>
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<tr>
<td>Environmentally responsible programs</td>
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<tr>
<td>Tourism's contribution to the promotion and preservation of natural assets</td>
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<td>Seasonal trends of tourism</td>
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<tr>
<td>Use of local companies in the design and the construction of the product</td>
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**Environmental Pillar**

- Pressure on natural areas (sites)
- Pressure on resources
- Exposure to climate risks (floods)
- Take into consideration alternative resources when designing and constructing assets
- Creation of green spaces
- Efficiency of resource consumption
- Level of use of alternative resources
- Efficiency in the management of releases and wastes
- Environmentally responsible programs
- Tourism's contribution to the promotion and preservation of natural assets
- Seasonal trends of tourism
- Use of local companies in the design and the construction of the product

**Socio Economic Pillar**

- Pressures on the local population (nuisance, tourist density, etc.)
- Local population access to the equipments/ infrastructure and tourist attractions
- Integration of buildings in the urban local style
- Nuisances resulting from constructions
- Stability and quality of tourism jobs
- Contribution of tourism to the renovation of cultural monuments
- Contribution of tourism to the valuation of intangible heritage (local culture, gastronomy, etc.)
- Participation of tourism in the development of the local economy and job creation in the region
- Employing local people in the construction of tourism assets
- Existence of sustainable development offers (labels, specialized travel agencies, etc.)
- Promotion of Morocco as a green destination to institutional and private sector (TO, etc.)

**Social/Cultural Pillar**

- Environmental Pillar
- Socio Economic Pillar
- Social/Cultural Pillar
### III - Indicators of sustainability in Tourism

#### SUSTAINABILITY STRUCTURING DIMENSIONS (2/2)

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>Existence of UNESCO World Heritage sites (material and immaterial)</td>
<td><em>Promotion of environmentally friendly modes of transport</em></td>
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<tr>
<td>Existence of local initiatives for the environment protection and the heritage preservation</td>
<td><em>Respect of standards and regulations related to transport</em></td>
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<tr>
<td>Existence of sustainable development offer (labels, specialized travel agencies, etc.)</td>
<td><em>Civil participation of tourism facilities</em></td>
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<tr>
<td>Tourism's contribution to the promotion of Morocco as a green destination</td>
<td><em>Staff quality of tourism facilities</em></td>
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<tr>
<td>Capacity and quality of infrastructure (transit time at the airport, etc.)</td>
<td><em>Adherence to international standards related to accommodation</em></td>
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<tr>
<td>The quality of service in the whole touristic chain (in welcoming)</td>
<td><em>Cleanliness and respect of hygiene standards</em></td>
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<tr>
<td>Concentration/density of tourism</td>
<td><em>Quality of the interaction with the local community</em></td>
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<tr>
<td>Level of pollution and nuisances found</td>
<td><em>Cleanliness and respect of food standards</em></td>
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<tr>
<td>Quality of the interaction with local population</td>
<td><em>Enhancement of the local gastronomy and local products</em></td>
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<tr>
<td>Availability of information on the state of sustainability programs implemented</td>
<td><em>Condition of natural and cultural sites (quality of bathing water, Pollution, etc.)</em></td>
</tr>
</tbody>
</table>

**Tourist experience**
III - Indicators of sustainability in Tourism

Governance of the sustainability monitoring framework

- Steering Committee (Ministry of Tourism – Ministry of Environment)
  - Monitoring sustainability within tourism and V2020 orientations in the light of sustainability report

- Monitoring Committee (Tourism – Environment)
  - Follow up, consolidation and reporting to the steering committee
  - Risk Management
  - Draw up institutional communication plans
  - Prepare sustainability status report
  - Production of tourism sustainability scoreboard

- Regional monitoring committee of sustainability (local representatives of Tourism – Environment) within the regional observatory of environment
  - Collecting and centralizing the indicators at the regional level
  - Recomendations & orientations
  - Selecting dimensions of sustainability to follow
  - Take a decision regarding the indicators list
  - Decide annually on the progressive geographical expansion of the device
  - Validate the communication plan of the indicators

PHASES OF IMPLEMENTATION

2013
- Starting with a pilot destination - Marrakech

2014
- Evaluation of the pilot
- Starting the expansion of the monitoring tool to other destinations

2015
- Generalisation of the process and taking it to a national level