

AGADIR

SOUSS MASSA DRÂA



CHEMONICS INTERNATIONAL INC.

TOURISM DEVELOPMENT OPPORTUNITIES

Contract # OUT-PCE-1-809-98-00015-00





INTRODUCTION

Agadir is one of the more popular beach destinations in the North African/Mediterranean Zone. For the past 20 years more than 500,000 visitors have come to this coastal city annually to enjoy the fine beach, guaranteed sunshine and exceptional hospitality of the Moroccan people. Like many similar beach locations, the community has attracted venture capital from the domestic and international investors and consequently the city has prospered because of construction and tourism revenues. Fortunately most hotel and restaurant properties are owned and operated by Moroccans, thus ensuring that much of the revenues are circulated within the national economy.

Agadir is also a major fisheries and shipping port and is at the center of a large agricultural industry. The latter provides fruit and vegetables to centers throughout the world but also serves the regional market and this furthers the opportunity for foreign exchange to circulate within the region.

To maintain a competitive edge in the world economy it is critical that each component continually evolve to meet changing market demand.

The 4 pillars of the regional economy; fisheries, agriculture, tourism and shipping, therefore provide a strong, and to some extent integrated, long term economic foundation for Agadir-Souss Massa Drâa Region

However to maintain a competitive edge in the world economy it is critical that each component continually evolve to meet changing market demand. Agriculture for instance has identified the new value of organic foods in the European market and consequently has repositioned a portion of the industry to satisfy these emerging demands.

The tourism sector also needs to evaluate the current changes in the marketplace in order to ensure that the products offered over the next decade correspond to market characteristics and demand.

1.2 Changes in the International Tourism Marketplace

Agadir has enjoyed substantial success in the tourism business since the mid 1980's when there were approximately 432,000 visitors and 3,232,000 visitor nights (in 1987). Since then, tourist volume has grown at a reasonable 50% however overall visitor nights have only increased by a modest 30%. In other words while total arrivals have kept pace with overall industry growth, the length of stay has fallen off significantly. This is presumably a result of overall trends towards shorter vacations as well as a lack of product diversity to respond to contemporary demands for multiple activity vacations.

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To be fair, tourism growth also received 2 significant setbacks: in 1991 because of the Gulf War and again in 1994 with the death of a tourist. Following the latter incident, GRIT was formed (1996) and the industry has rebounded with a 20% growth since 1997.

In 2000, occupancy rates were the lowest in the previous 3 years and 15 points lower than the high in 1988. While 2001 promises to be better there are still a number of factors that cause concern about the future of the tourism sector if the status quo is maintained. These include, but are not limited to, the following factors:

a) A Homogeneous Tourism Product in Agadir

The Agadir suppliers offer the standard 'Beach Destination Product' which varies little from similar destinations in competing destinations in Spain, Tunisia, Turkey and more recently in Caribbean countries like Cuba and the Dominican Republic. In fact some of these destinations have radically improved their product by offering new attractions, entertainment and evening activities. It would appear that Agadir has continued to attract new visitors because of an attractive price structure rather than new excitement in the overall and evolving product.

However lower prices means that there is less capital available to upgrade the 'plant' and consequently little new interest is generated in the destination.

For this reason, Agadir hoteliers are extremely vulnerable to the shifts in consumer demands and the forces of the international Tour Operators (TO's). With such a limited or homogeneous product, there is little excitement being generated among the travel consumers. As well with lower than average occupancy rates the TO's are in a position to squeeze prices and shrink hotelier margins.

This was seen recently when one tour operator had a substantial impact on overall occupancy rates by pulling a part of his volume to another destination.

This standardized product has also meant that the local industry is more or less tied to a mere 3 markets who last year generated more than 2/3rds of the volume.

They include the French (common language), Germans (low cost) and Moroccans (accessibility). All other countries generate less than 5% of the volume.

b) New Hotel Properties

The industry will experience further upheaval in the next 5 years as 4 new hotels are constructed on the beach. This will triple the room capacity in the city and more than double the number of quality rooms. While these properties have access to their own tour operators they will undoubtedly suppress the occupancy rates of those 4 star resorts that offer similar amenities.

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While rates are sure to drop there is, nevertheless, a recent history of a return to normal occupancies within 2 or 3 years.

Despite the impact of these openings on existing properties, the new facilities should generate increase European interest, in Agadir, as a sun destination. It is therefore timely to undertake a critical appraisal of the overall product and marketing efforts to see how the destination can be strengthened by the combination of new resorts and improved tour products.

c) The Need for Product Diversity

Despite the current modest growth rates, which are in keeping with the industry as a whole yet lower than the rest of Morocco, there is a need to expand the product offering and reposition Agadir as part of a diverse and exciting 'tourism destination region'. Current research indicates that a growing portion of the travel market is interested in more varied tour product. Consequently they tend to choose those destinations where they can participate in a wide selection of activities that respond to their particular interest. The typical travel consumer is more educated and active than the tourists of the 1970's and 80's. While they still appreciate the opportunity to relax and walk the beach, they are also interested in participating in and, learning from a variety of experience.

Few resort destinations have the potential to build on the resources of the surrounding territory like those operators in the Agadir-Souss Massa Drâa.

This would seem to be evident by a comment made by one of the hoteliers from GRIT who mentioned the 30% of the Germans coming to Agadir spend one week touring the countryside. This is consistent with the trends which sees more resort based visitors demanding and expecting excursions, interpretive tours, outdoor recreation activities beyond the limits of the property.

Few resort destinations have the potential to build on the resources of the surrounding territory like those operators in the Agadir-Souss Massa Drâa. Within a half hour of the tourist sector of Agadir, there are ample opportunities for exciting interpretive programs that can be of interest to most travelers.

It is therefore the challenge of GRIT and all those involved in the development of tourism in the region to assess the adjacent resources, match them with current and future market demand and establish the necessary product that will maintain the region as a dynamic destination for years to come.



2.

RESPONDING TO THE CURRENT SITUATION AND PREPARING FOR THE FUTURE





RESPONDING TO THE CURRENT SITUATION and PREPARING FOR THE FUTURE

2.1 The Need for Product Assessment and Change

The members of GRIT and the travel sector in general seems poised to implement changes in the product and marketing of the region. During their discussions with USAID they have identified a number of challenges and opportunities for their industry. If implemented, the development of these opportunities would create a substantially different tourism sector than the current one.

Initial GRIT negotiations have focused on a number of key components that will eventually shape the future of the travel industry in Agadir-Souss Massa Drâa.

They are mentioned at this time because they form the foundation to the recommendations presented in this report.

They include but are not limited to the following:

a) Improving the Tourism Data Base

The airport and other agencies have done an excellent job of collecting data on the number, source, and growth of tourism arrivals in Agadir. These visitor numbers can also be combined with occupancy rates and the number of visitor nights to present a broad portrait of the tourism business in Agadir. Unfortunately there is no data that provides a clear profile of the visitor. Such a statistical base would include information on preferred activities, previous destinations, number of visits to Agadir, source on information, expenditure by category, etc.

GRIT appreciates the value of this information as a planning and product development tool and is eager to begin surveying the Agadir visitor.

There is an understanding amongst the Agadir tourism professionals that to survive and grow they need to offer more varied tour product.

b) Expanding the Tourism Product and Developing the Region

There is an understanding amongst the Agadir tourism professionals that to survive and grow they need to offer more varied tour product to the visitor and in particular build on the natural and cultural resources of the surrounding territory.

This process has already started with the identification of 3 new tour circuits including Les Routes du Miel, Argane and Safran. Each of these products would offer a new experience to both the resort oriented tourist as well as those specifically interested in nature and culture based experiences of the Souss Massa Drâa Region.

GRIT also understands the importance of introducing the Parc National de Souss-Massa into the new product mix. Its' abundant bird life and flora as well as vibrant coastal community culture present multiple tour options for the international visitor.

c) Improved Marketing Mechanisms and the use of the Internet

The travel industry in Agadir and GRIT leadership must move quickly to adopt current marketing technology as part of their promotional mix. A well designed web site based on an e-commerce strategy is now essential in this industry. However, the region, and most hoteliers, are not equipped to respond to the consumers use of the Internet for vacation planning and booking.

As well the web pages must be designed as an integral part of the data collection process. Through the use of interactive technology it is possible to develop a targeted databank of those who show interest in the region.

d) Creating a New Image and Repositioning the Region

All tourism destinations have a product cycle that typically begins with a burst of growth. This stage is then followed by a period of stability and then a decline if the attraction does not change and "keep up with the times." Agadir may be at the end of its product life cycle since it is at best stabilized in some markets and declining in others such as the important German and Swiss markets. A significant double-digit growth was evident in March of this year in several "new" markets such as the Dutch (+56%) Luxembourgish (+38%), Danish (+63%), British charters (+115%) and Irish (+52%). However these increases are based on low base numbers (2-3000 visitors in 2000) and there is no evidence to ensure that this growth will continue.

GRIT has been very perceptive in identifying the need to reposition the product before serious decline sets in. It is obviously more difficult to turn around a failing product once the process has begun than to arrest the slippage at the onset and launch a new PRODUCT DEVELOPMENT and MARKETING initiative.

As well the identification of a new image or ‘brand’ for Agadir provides the opportunity to link the existing Agadir infrastructure and tourism plant with the natural, cultural and community resources of the Souss Massa Drâa. This combined product will provide, what M. le Wali calls the “synergy” that can reposition the destination.

e) Additional GRIT Concerns

There are a number of additional concerns that are frequently discussed among GRIT members and this report will address them within the context of the USAID program. They include:

- Inadequate ‘lift’ or direct air access into Agadir from high volume countries such as Germany
- Insufficient nightlife and entertainment to meet the needs of the contemporary traveler
- Continued erosion of the beach front
- Need for ongoing training of local personnel in the hospitality sector

2.2 The Importance of the Group Focus

The use of a Group Focus to identify, clarify and prioritize the major issues affecting GRIT and the tourism suppliers of the region was an excellent format.

The use of a Group Focus to identify, clarify and prioritize the major issues affecting GRIT and the tourism suppliers of the region was an excellent format to record the current state of the travel sector.

Following an introduction by M. Le Wali de la Région and a presentation of leading international travel trends by the consultant from Chemonics, 25 industry leaders met in a workshop setting to establish the following components:

- Image of Agadir
- Strengths and weaknesses
- Position of the industry in 2010
- Principal areas of intervention for the GRIT
- Classification of most important GRIT measures
- Prioritizing of GRIT activities

- *International Travel Trends*

In order to reposition the Agadir-Souss Massa Drâa region as an international travel destination it was considered vital to address the trends and issues that are shaping (and will influence) the travel industry over the next decade. A description of those trends is found in appendix 1.

It is important, in reviewing the recommendations of this report, to appreciate those trends that will directly influence the growth of travel in the region.

They include are but not limited to the following:

- a) High growth in such market segments as ecotourism. Adventure travel, heritage tourism and learning vacations at the expense of more traditional activities such as beach vacations, sightseeing and large group package tours;
- b) Increased interest in tour products that offer unique experiences, a sense of personal worth and self discovery, active participation and contact with local people;
- c) Interest in educational opportunities through high quality interpretive programs;
- d) Concern for the environment and increased support for sustainable tourism products and suppliers that incorporate ‘green’ management policies;
- e) Interest in traditional (i.e. Berber) cultures, customs and lifestyles including authentic entertainment, foods and crafts;
- f) A more demanding and sophisticated travel consumer who is prepared to spend more but demands the associated level of product quality (i.e. value-for-dollar);
- g) Increased market segmentation with high growth in several activates that could be available in the region including:

The region has the resource base, the leadership and the support of the national and local officials to respond to these emerging opportunities.

- Wildlife viewing and bird watching
- Hiking and trekking (coastal and mountain)
- Sea kayaking, mountain biking and cycling
- Visits to traditional communities and Contact with locals
- Amateur geology, ethnobotony, etc.
- Traditional food preparation

The region has the resource base, the leadership and the support of the national and local officials to respond to these emerging opportunities and shifts in the market place. A concerted effort at ‘new’ product development, marketing and training should enable the travel sector to effectively respond to the trends and launch an innovative travel product for the 21st century.

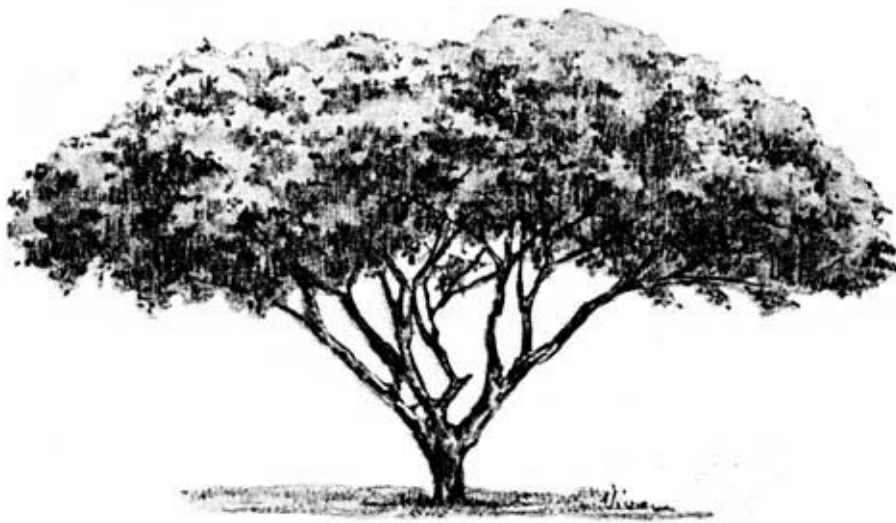
- ***Defining the Priorities and the Action Plan***

In order to define the priorities, four working groups were created to discuss and expand the understanding of each. They included the following:

- 1) Product Development
- 2) Marketing and Promotion
- 3) Vision and Sustainable Tourism Planning including Data Collection and Analysis
- 4) Transportation and Access

Each of these priorities establishes the foundation for the Action Plan or the ‘blueprint’ that will guide and enable GRIT and USAID to cooperatively meet the tourism growth objectives. The challenge is to ensure that each of these priorities is implemented in a systematic and coordinated way.

Because of limited resources, the urgency to address each issue and the current enthusiasm of the business community in the Agadir-Souss Massa Drâa the activities will be presented in three phase representing an immediate, short and longer term implementation schedule.



3. IMPLEMENTATION OF THE ACTION PLAN





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3.1 The Structure of the Action Plan

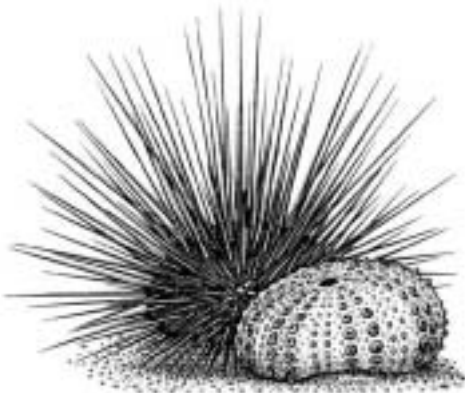
The priorities that were identified and described during the Group Focus are presented here as distinct activities within the context of an integrated Action Plan.

They are offered under the following headings:

- A) *Raison d'être and Description*
- B) *Responsibilities and Implementation*
- C) *Cost Estimates*

It is anticipated that all three phases could be implemented over the next 18 months.

It is anticipated that all three phases could be implemented over the next 18 months. Each proposed action will be designed to build on the previous and where possible parallel activities will be outlined to save time and maximize human resources. For instance because of the extended time associated with data gathering, this activity will begin before the launch of the Sustainable Tourism Development Strategy which would include an exhaustive resource analysis. Similarly, green management techniques and standards will be identified before the actual design and launch of new product.



The activities of the three phases are as follows:

PHASE 1: Immediate-Term Action

ACTION 1.1 Database Development and Management

A) Raison d'être and Description

In order to survive in the contemporary business environment it is essential to have a comprehensive understanding the existing and potential markets. In particular, the tourism entrepreneur must have a comprehensive description the client profile and the mechanism to communicate directly (CRM-Customer Relations Management) with the potential visitor. Therefore data gathering must go beyond the collection of statistical data and include the management of this information so that constant communication may be established with the consumer.

Consequently it is critical that the database development, undertaken in this activity is merged with the following ACTION 1.2, the e-Commerce Strategy.

- ***The Expanded Database***

There is relatively little knowledge about other market segments than the beach tourist currently visiting Agadir.

The current database offers little information to enable the Agadir travel industry to build new product, met visitor expectations and expand market share. Other than visitor volume, origin and length of stay, there is very little documented about the current visitor.

Also there is relatively little knowledge about other market segments than the beach tourist currently visiting Agadir. For instance, in Germany there are more than 9 million international travelers who travel annually to experience native cultures that are similar to the Berber People of the Souss Massa Drâa. Similarly the British, which are currently the regions fastest growing market, have millions of travelers that are interested in bird watching. Many of these people would be very interested to experience the bird life of the Parc National de Souss-Massa.

The proposed new database will be built on four area of primary and secondary research including:

- Visitor Exit Survey
- Inventory of European and North American Tour Wholesalers
- Analysis of Leading Consumer and Tourism Trends
- Identification of Select Market Segments

a) Visitor Exit Survey

The Visitor Exit Survey will be one of the most important and enterprising activities of the Action Plan. It will be designed to assess the current visitors to the region and will enable all local suppliers, GRIT and the National Government to have a comprehensive profile of the visitor mix.

- ***Survey Structure***

The following list provides a sample of the information that would be available from the survey.

- a. Demographics: age, education, household income, party composition
- b. Psychographics: purpose of trip, preferred activities, motivation, expectations, level of satisfaction, etc.
- c. Travel Characteristics: source of information, propensity (frequency) to travel, trip planning and booking methods, other destinations of choice, etc.
- d. Expenditures (Value): By category (food, craft, entertainment, etc.) while in the region
- e. Other destinations in Morocco: length of stay, activities, transportation, level of satisfaction, etc.

- ***Survey Distribution***

The survey will be conducted in collaboration with several partners including Royal Air Maroc, various air charter carriers, motor coach operators and the airport. The surveys will be distributed to the tourist on their return flight/trip home, collected by the airlines/motor coach operator and returned to GRIT for classification and documentation.

The survey will be conducted in collaboration with several partners including Royal Air Maroc.

Data will be collected over 12 months and the results will be distributed to the travel trade every three months.

b) Tour Operator Survey

To date the hoteliers and suppliers have been working with a relatively limited number of European tour operators and very few North American influencers. If the Agadir-Souss Massa Drâa Region is to be positioned in the emerging markets then GRIT must identify those wholesalers and tour operators that sell the products that respond to the regions strengths.

The survey should also consider the importance of the North American Market, especially in those market segments where the US traveler would be interested in the Souss Marra Drâa product such as mountain biking, hiking, bird watching, sea kayaking, etc.

c) International Market Trends

GRIT must make a concerted effort to become familiar with the current state of the international travel market.

GRIT must make a concerted effort to become familiar with the current state of the international travel market. Local hoteliers have certainly noted that the demographics of their clients have changed and those segments that used to be attracted to the region no longer see Agadir as a preferred destination.

There is ample secondary research information that could be applied to the existing tour product in the region. This information should be collected and adopted to the needs of the Agadir-Souss Massa Drâa operator and supplier.

d) Identification of Potential Market Segments

As indicated in the Group Focus ‘Trends’ presentation, the travel market is becoming increasingly segmented. It appears that in the future, all tour operators will even be asked to meet the exclusive needs of individual travelers.

The research conducted in the three above activities should provide the GRIT with the information to identify in reasonably specific terms at least 100 market segments that could be attracted to the region. This information would immediately serve some of the local suppliers. However it will be most helpful in the preparation of the *Sustainable Tourism Development Strategy* when these market segments are matched with the results of the resource inventory to identify specific product opportunities.



B) Implementation and Responsibilities

The implementation of this program would start June 2001 under the direction and in collaboration with qualified consultants and in house staff.

The *Visitor Exit Survey* would be run from August 2001 to July 2002

The Survey of Tour Operators would take place from August 2001 to November 2001.

The GRIT would determine other activity schedules

All data would be collected, classified and assessed by a GRIT technician.

C) Cost Estimates

The following costs have been prepared based on industry standards and the use of both international and Moroccan staff.

a) Exit Survey and Tour Operator survey Design	\$ 5,000
b) Visitor Exit Survey Data Gathering	\$ 45,000
c) Software Training (File Maker Pro)	\$ 2,000
d) Data Input and Review	\$ 5,000
e) Tour Operator Survey	\$ 10,000
f) Market Segment analysis and Description	\$ 12,000
g) Equipment/Software for Database	\$ 2,000
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	\$ 81,000

ACTION 1.2 e-Commerce Strategic Planning and Marketing

A) Raison d'être and Description

The future role of the Internet in the travel industry has already been confirmed.

The longer-term success of the development of the Agadir-Souss Massa Drâa Region will be closely associated with the efforts of local suppliers and GRIT's ability to define, launch and maintain a professional e-commerce strategy. The future role of the Internet in the travel industry has already been confirmed by recent (March 2001) research, which indicates the highest sales volume on the Internet is tourism and travel. As well by the year 2004 it has been estimated that more than a third of all European travel will be purchased on the Internet.

Agadir's current position on the Internet is weak. There is no generic site that can lead a visitor to the various attractions and facilities.

As well, the unique resources of the Souss Massa Drâa and the National Park are not available despite the millions of Internet users that could be interested in these resources.

a) Preparation of an e-Commerce Strategy

The key to successful Internet and Web Site Marketing is a comprehensive e-commerce plan that connects a number of marketing tools including: visitor database, market warehouse, interactive web site, electronic brochures, e-advertising and promotion on various travel sites (away.com, iExplore.com), CDROM and virtual magazines, etc.

The e-commerce Strategy will integrate these and other components into a 5-year promotional plan that will provide both GRIT and the regional travel trade with the ability to promote, inform, respond and communicate directly with qualified clients.

As well, the Strategy will identify how to merge the data collected from the *Visitor Exit Surveys* with a targeted promotional effort that will seek to directly contact 200,000 people annually by 2004.

- ***Web Site Design and Launch***

A Web Site that presents the entire Agadir-Souss Massa Drâa Region will be prepared and launched in advance of the 2002 season.

The site will be designed to the highest standard with respect to opening page, layout, text and graphics. No page will exceed 50 KB, contain no more than 2 screens and it will be 'printer friendly'.

Specific information on the web site will include:

- a. Links to all online operators and suppliers in the region
- b. Links to relevant governments and organizations
- c. Links to pertinent information sources such as the list of birds in the National Park
- d. Description of the three routes (Miel, Argane, Safran)
- e. Presentation of Berber culture, folklore, philosophy, etc
- f. Introduction to local arts and craft

Features of the site that will encourage interactivity include:

1. Online Guest Book (to collect information)
2. Virtual Postcards
3. Online Reservations at the various hotels
4. Interactive maps of Agadir, the Souss Massa Drâa, la Route du Miel and the National Park



- ***Electronic Brochure***

The Visitor Exit Survey and the Online Guest Book will generate thousands of email addresses over the next few years.

The Visitor Exit Survey and the Online Guest Book will generate thousands of email addresses over the next few years. A model e-brochure, e-zine and newsletter will be prepared for immediate distribution. It will be designed so that it can be distributed by the numerous sources within the region. For instance if a hotelier wishes to conduct an in house ‘mailing’ it will be possible to integrate information (photos, rate sheets, amenities, etc.) that are pertinent to the individual property.

- ***CDRom Virtual Tour***

A CDRom that provides a virtual tour of select sites throughout the region will be prepared for distribution. Among the first recipients will be the 800 travel agents who visited Agadir for the annual SNAV conference in 2001.

Possible sites and activities for inclusion on the CDRom will be determined by GRIT but may include Souss Valley, carpet making, scenes from Taroudant (Place Assarag), Berber culture in Imouzzer, etc

B) Implementation and Responsibilities

The e-commerce strategy would be implemented under the direction of a special committee of GRIT involving those most familiar with the opportunities presented by Internet marketing.

There seems to be adequate web production skills in Agadir however that person must work with a tourism specialist who understands the role of Internet marketing for the travel trade.

C) Cost Estimates

The following costs have been prepared using industry standards.

a) Preparation of an e-commerce Strategy	\$20,000
b) Interactive Web Site Design and Launch	\$45,000
c) Assistance to local operators in web site planning	\$10,000
d) Electronic brochure	\$ 5,000
e) Electronic newsletter (layout)	\$ 3,000
f) CDRom	
-- Photography	\$ 5,000
-- Preparation	\$15,000
-- Distribution	\$ 8,000
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	\$111,000

ACTION 1.3 Development of Circuit or Corridor Itineraries

A) Raison d'être and Description

Three distinctive tourism corridors have been identified by GRIT. They are intended to encourage travel into the countryside and provide visitors to Agadir with a more diverse product mix.

A fourth itinerary to the Parc National de Souss-Massa is also proposed in this report.

The three *Tourism Corridors* include:

- Route du Miel,
- Route du Aragane
- and Route du Saffran.

Within these corridors it is possible to have a variety of touring options ranging from one to five days.

The corridor concept is very strategic since it provides an opportunity for both Agadir visitors as well as those arriving in the Souss Massa Drâa Destination Region to experience the natural and cultural environment of the area.

The process involved in establishing these circuit itineraries include:

- Preparing an inventory* of all attractions, natural and cultural features and facilities within the route corridor;
- Meeting with community* groups to discuss the tourism opportunities
- Identifying market segments* that could be attracted to the theme of the circuit
- Preparing alternative itineraries* including all activities and services
- Negotiating responsibilities* and net prices with all partners within the corridor
- Preparing a day by day itinerary* including service charges for multiple day packages
- Ensuring an *adequate description* of the corridor product on the web site

The corridor concept is very strategic.

The Parc National de Souss-Massa will be evaluated in a similar manner for the preparation of at least 5 itineraries focusing on:

- Bird watching
- Community activities and traditional fishing
- Wildlife observation
- Photo safaris
- Nature interpretation and Forest regeneration

B) Implementation and Responsibilities

Work has already started on the preparation of La Route du Miel by the product development committee of the GRIT.

Similar efforts should be launched within the next few months on the planning and development of the other corridors.

It is essential that a committee of GRIT begin assisting the National Park officials.

There are currently 4 people working on the planning of the National Park. In order to assure that the desired itineraries are developed within the next 2 years it is essential that a committee of GRIT begin assisting the National Park officials. Staff who are responsible for the management and long range planning of the Park have no experience in working with the travel trade and consequently GRIT can play an important coordinating role.

C) Cost Estimates

The following costs are identified for the preparation of these tour package products:

Route du Miel	\$10,000
Route du Argane	\$10,000
Route du Sattran	\$ 8,000
Parc National du Souss-Massa	\$10,000
Product Integration	\$ 2,000
Web Marketing	\$ 3,000
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	\$43,000



ACTION 1.4 Developing Policies, Norms, Standards and Certification Criteria

A) Raison d'être and Description

With the repositioning of the region it is critical for GRIT to establish a set of *Operational Guidelines* for all suppliers in the Agadir-Souss Massa Drâa Region. The more sophisticated contemporary tourist, including ecotourists and adventure travelers, have traveled extensively and consequently they appreciate good hospitality, security and interpretive services.

As well, in order to legitimately promote sustainable tourism and ecotourism it is critical that most tourism businesses operate under 'green' management procedures and practices

The subject areas to receive attention include:

- Safety and Security Procedures
- Green Management Practices
- Sustainable tourism Policies
- Environmental Health Standards
- 'Responsible Tourism' Certification

• *The Policies, Norms and Standards Framework*

In order to effectively integrate these various policies and standards it is first necessary to prepare a development and implementation framework, which will guide the individuals charged with the preparation of the various manuals.

Each of the above subject areas will be documented according to the following categories:

- Review of existing situation
- Analysis of International Standards
- Description of specific policies, guidelines and standards
- Implementation of Procedures and Practices including training requirements

a. Safety and Security Procedures

With increased tourism activity in the backcountry it will be essential to have a Search and Rescue and Evacuation Plan.

- *First Aid:*

All staff that is in contact with the tourist must receive First Aid training including CPR. The requirements of this program will be defined.

- *Risk Management:*

Operational standards for accident prevention will be prepared for both Agadir and the Countryside.

- *Rescue and Emergency Evacuation*

With increased tourism activity in the backcountry it will be essential to have a Search and Rescue and Evacuation Plan in place to respond to emergencies.

b. Green Management Practices and a Strategic Planning Workshop

This ACTION will begin with the delivery of a 3-day Green Management Strategic Planning Workshop.

An Operational Manual that outlines all 'green' management practices will be prepared. It will specially focus on those issues that are critical to the region including:

- *Water Conservation*

Techniques and technologies that reduce the use of dwindling water supplies will be presented.

- *Energy Conservation*

Techniques to reduce energy consumption will be addressed including the sources of renewable energy technologies.



Purchasing procedures that focus on environmentally responsible products.

- *Purchasing and Environmental Audits*

Purchasing procedures that focus on environmentally responsible products that respect the environment will be presented

Environmental audits are increasingly seen as a process to protect the environment and save money. This is particularly true in an area where water and energy costs contribute to such a large portion of a hotels operating budget. The Audit will be presented as an integral part of the green management strategy.

Techniques on how to prepare an in-house environmental audit will be presented.

c. Souss Massa Drâa Sustainable Tourism Policies

A comprehensive set of *Sustainable Tourism Policies* will be prepared for widespread distribution to all tourism suppliers, foreign wholesalers and tourism related agencies. This document will form the basis to developing a more responsible tourism industry and will cover such topics as:

- Architectural Design and Restoration
- Green Management Practices
- Environmental Impact Assessment
- Tourist Education and Awareness
- Marine Debris Reduction
- Resource Management
- Human Resource development
- Distribution of Tourism Revenues
- Intergenerational Equity
- Community Participation in Tourism Planning

d. Environmental Health Standards

This topic will address a variety of issues from hygiene to the use of chemical cleaners to drinking water standards.

Emphasis will be placed on Quality Control (e.g. food production, staffing) as well as protection for employees.



e. 'Responsible Tourism' Certification

'Eco labeling' or certification is increasingly seen as a method of both educating the tourism supplier as well as attracting the responsible tourist.

More often the environmentally consciousness traveler wants to know, in advance, the responsible policies of the tourism destination and the tour supplier. 'Eco labeling' or certification is increasingly seen as a method of both educating the tourism supplier as well as attracting the responsible tourist.

In fact all travelers are interested to know that a potential supplier of their vacation services has been identified for environmental excellence by the local (e.g. GRIT), national or international (Green Globe 21) tourism organization.

A certification program relevant to the region and responsive to international standards will be designed and implementation procedures will be outlined.

B) Responsibilities and Implementation

GRIT will be responsible for setting up each program as well as the overall management. Select GRIT members will be charged with the various tasks.

C) Cost Estimates

• Operational Standards and Procedures Framework	\$5,000
ii) Safety and Security	
-- First Aid Standards	\$3,000
-- Risk management Procedures	\$3,000
-- Rescue and Evacuation Procedures	\$5,000
iii) Green Management	
-- Workshop	\$10,000
-- Procedures Manual	\$10,000
iv) Sustainable Tourism Policies	\$15,000
v) Environmental Health Standards	\$5,000
	<hr/>
	\$56,000

ACTION 1.5 North American Study Tour

A) Raison d'être and Description

At least 6 individuals from the region will have the opportunity to visit examples of facilities, organizations, and programs that respond to the types of initiatives outlined in this report.

The tour will be developed around the following themes:

- Data Collection and Management
- Regional Tourism Tour Product Development
- Green Management for the Resort Sector
- Norms and Standards
- National Park Planning
- Review of Resort Destinations

Due to the extensive use of French by the participants, it is proposed, at this time, that much of the tour take place in Ottawa and Québec. All study tour objectives could be accomplished within the relatively short *Ottawa-Montréal-Québec City Study Corridor (360 miles)*

The various themes would be accommodated in the following way:

a) Data Collection and Management

The Canadian Tourism Commission and Statistics Canada are considered one of the best data collection agencies in the world. Meetings would be set up with the directors of both these agencies including a tour of their facilities and discussions with their bilingual staff.

Tourism Québec also manages one of the largest customer data bases (5000,000 profiles) in the world and can provide an excellent example of CRM.

b) Regional Tourism Tour Product Development

Several regions within or adjacent to the 'study corridor' can provide excellent examples of tourism circuits. For instance the Outaouais and Charlevoix regions have several 1 to 4 day tours that could be studied in terms of product mix, components, marketing, etc.



c) Green Management

Several large hotel operations in Ottawa and Montréal have made a substantial effort to adopt green management practices. As well Intrawest, the developers of the Mont Ste-Anne resort destination can demonstrate their efforts to build according to the highest environmental standards.

d) Norms and Standards

The Québec Bureau de Normalisation (Québec City) has set some of the most rigorous standard in North America. They are also developing new standards for ecotourism and adventure travel.

e) National Park Planning

The Canadian National Park System is well recognized for its planning procedures. With head offices in Hull, Québec, it will be possible to meet with M. Bruce Amos, Director of Strategic Planning as well as those individuals responsible for the planning of parks in Canada’s coastal areas.

f) Resort Destination Development

The Mont Ste-Anne Destination Resort is a model for planning and development. As well as a major employer, it has set a new precedent for working in collaboration with the local community.

These and other sites of interest may be visited to discuss issues such as water conservation, professional training, urban design, etc

The USAID /
Chemonics
representative
in the ‘study
corridor’ could
be responsible
for identifying
and arranging
all activities.

B) Responsibilities and Implementation

The study tour is a responsibility of the GRIT/USAID Partnership. They will select the individuals for the trip and assume responsibility for the final itinerary.

The USAID/Chemonics representative in the ‘study corridor’ could be responsible for identifying and arranging all activities, meetings, presentations, accommodations and receptions while the group is touring.

C) Cost Estimates

Airfare-Van Rental/Gas	\$12,000
Accommodation and Food	\$12,000
Space Rental/Receptions	\$ 8,000
Tour Management	\$ 7,000
Contingency and Incidentals	\$ 5,000
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	\$44,000

PHASE 2: Short-Term Action

ACTION 2.1 Development of Animation and Entertainment Programs

A) Raison d'être and Description

Agadir does not provide the level of activity/event programs, entertainment and nightlife that is currently found in most destination resort zones such as Paradise Island, Bahamas, Cancun, Mexico, etc. On the other hand the region is rich with local folklore, musical traditions and festivities.

Under this action step, a review will be made of all existing entertainers who could provide regular performances to the tourists. The use of traditional entertainment can also be an effective way to protect certain cultural activities. The product must remain authentic and, where necessary, training can be provided to younger artists to ensure that the traditions are not lost.

Festivals offer a special opportunity to entertain and educate the visitor as well as provide international exposure for Agadir.

However they are expensive to produce and require mobilizing thousands of hours of volunteer time. It is possible, however, to solicit sponsors and funds from various organizations associated with the festival theme.



B) Responsibilities and Implementation

Under a committee of GRIT, 2 local people will be hired, on contract, to assess the animation and entertainment resources and opportunities.

They will begin the process by identifying the various sources for regional entertainers that could be integrated into a year-around program. Emphasis will be placed on that artistic expression that are may disappear in the next 2 decades.

The team will then define the potential program that could be offered throughout the year.

As well, there will be an investigation of the available sponsorship sources that could potentially contribute to the various entertainment and artistic programs.

C) Cost Estimates

-- Opportunity Analysis	\$15,000
-- Animation Product Planning	\$10,000
-- Financial Assessment	\$3,000
-- Marketing requirements and Costs	\$2,000
-- Sponsorship Review	\$5,000
-- Cultural Protection and Enhancement Programs and Training	\$5,000
-- Product Testing	\$10,000

\$50,000



ACTION 2.2 Souss Massa Drâa Sustainable Tourism Development Strategy

A) Raison d'être and Description

Typically the development or repositioning of a region starts with the preparation of a 10-year strategic plan. However to meet the immediate needs of GRIT and the donor, the more pressing issues of phase 1 will have priority before the launch of the planning process.

The Sustainable Tourism Strategic Plan will also be a model for all of Morocco and the North Africa/ Mediterranean Zone. All recommendation will consider sustainable development principles and practices.

The plan will specifically look at the existing and proposed tourism plant in order to identify future visitor facility and program requirements. Where possible, there will be extensive use of existing data. As well the results of the previous ACTIONS (1.1 to 1.4), and in particular the Data collection, will be integrated into the planning process. In fact all previous recommendations from the Action Plan will be meshed with the various activities of the planning process.

The *Planning Process* will be divided into 4 phases.

Phase 1 will focus on defining the vision followed by the resource and market inventory and analysis; it will terminate with an assessment of the carrying capacity of the various sites identified in the inventory.

Phase 2 will focus on the Product/Market Matching process as well as alternative development scenarios

Phase 3 will define the products and facilities to be developed over the next decade including an assent of the various economic impacts.

Phase 4 will concentrate on the implementation activities, priorities, schedule and responsibilities. A detailed Marketing Plan and Training Plan will be prepare as well as cost estimates for all proposed infrastructure and programs.

B) Responsibilities and Implementation

Since this is one of the largest expenditures in this program, the consultants will report to a select steering committee. This team will provide feedback to the planning process as well as ensure that public participation is encouraged.

The steering committee may eventually be asked to oversee the implementation of the strategy.

C) Cost Estimates

The cost breakdown is derived from the various tasks of the planning process. Ample opportunity has been structured into the methodology for 'Public Consultation'.

The costs are as follows:

• Preplanning and Logistics	\$2,000
• Vision, Mission Goals	\$5,000
• Resource Inventory and Analysis	\$33,000
• Community/public Participation	\$10,000
• Social/Environmental Carrying Capacity	\$10,000
• Complete the Market Analysis	\$10,000
• Product/market matching	\$10,000
• Draft Tourism Development Plan	\$15,000
• Preparation of theme and Concept	\$15,000
• Product Opportunity Layout and Design	\$25,000
• Economic Impact	\$5,000
• Implementation Strategy	
-- Development Schedule	\$10,000
-- Training Requirements	\$15,000
-- Development Cost Estimates	\$18,000
-- Marketing Strategy	\$15,000
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	\$198,000

ACTION 2.3 Beach Erosion Recommendations

A) Raison d'être and Description

Efforts have been made to arrest this shoreline destruction with the use of barriers, groins and riprap.

The Agadir beach is currently one of the top attractions in the region and Morocco. However due to changing sand deposit patterns, in part because of the port construction, large sections of beach front are eroding. Efforts have been made to arrest this shoreline destruction with the use of barriers, groins and riprap. However the loss of sand continues and with the projected rising sea levels in can be anticipated that further damage is inevitable unless more serious measures are taken.

For instance, the use of groins, are used frequently along beaches where there is extensive recreation activity. While they are unattractive they are effective in conditions similar to the Agadir situation.

Several studies have been conducted and it remains to be decided what measures are the most cost effective.

This ACTION would result in the evaluation and updating of existing studies with the goal of identifying short and long-term solutions.

B) Responsibilities And Implementation

The City of Agadir and the Chamber of Commerce should take the lead in the analysis of the important problem.

Once a firm commitment has been made to a solution it will be possible to solicit funds from various national and international sources.

C) Cost Estimates

The costs of evaluating existing studies and finalizing a solution are **\$20,000.**



A) Raison d'être and Description

• ***Direct and More Frequent Air Service***

Air access ('lift') has been a problem for the Agadir Region for many years. In particular there has been inadequate direct connections between major European centers and Agadir. Germany, for instance, which is the top volume generator, has no direct flights with all scheduled passengers flying through Casablanca-CMN.

RAM has recently made a commitment to the French market and has launched direct daily flights from Paris.

RAM has recently made a commitment to the French market and has launched direct daily flights from Paris. As the National Flag Carrier it can be expected to demonstrate leadership in opening new routes. On the other hand, the commitment to direct regular flight to meet the needs of the leisure travel market can be both risky and expensive.

Agadir bound tourists are very cost conscious and a scheduled airline, like RAM, must compete with charter operators with their much lower cost structures.

However there are methods to negotiate with the airlines and lower their risk factors. They include:

- Entering into marketing partnerships (i.e. the web site) that will increase volume
- Preparing strategic plans that demonstrate a commitment to new products that improve passenger yield (higher revenues per passenger)
- Reposition the region as a destination that appeals to more than a few market segments

• ***Rubber-tire (Motor coach) Access***

The highway from Marrakech to Agadir is currently inadequate to provide decent motor coach travel between the 2 cities. This is largely due to the extensive truck traffic causing both congestion and danger.

There have been calls for the twinning of the highway, which seems to be the only long-term solution.

However with new product development in the countryside it may be possible to encourage some motor coaches to take alternative routes.

B) Responsibilities and Implementation

In order to resolve these transportation issues it is necessary for GRIT and the Chamber of Commerce to prepare the necessary documents (ACTIONS 1.1, 1.3 and 2.2) and present them to the airlines and motor coach companies.

C) Cost Estimates

For document preparation, planning, negotiating and travel a total of \$20,000 is projected.

PHASE 3: Longer-Term Action

ACTION 3.1 Regional Tour Product Developments Support

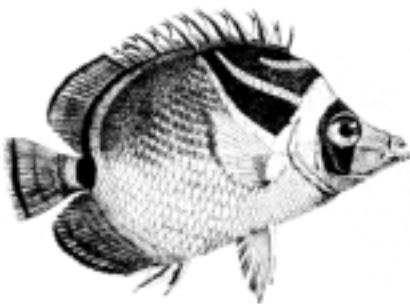
A) Raison d'être and Description

In order to successfully reposition the Agadir-Souss Massa Drâa Region it will be essential to develop new tour product. This will essentially be the responsibility of the existing and emerging private sector. However any effort to move into such market segments as ecotourism, learning vacations and adventure travel will require professional support at the regional, community and National Park level.

For the most part this assistance can come from local industry leaders, experienced GRIT members, foreign tour wholesalers and specialty travel consultants.

These support services will be provided to those in Agadir and the Souss Massa Drâa who wish to initiate new products and services and collaborate with existing local resort operators.

The more immediate assistance will go to those offering product within the three corridors (Route du Miel, Argane, Safran) and Parc national de Souss-Massa.



Assistance will include but not be limited to the following:

- *Itinerary Preparation and Manual*

Assistance will be provided that will enable the local entrepreneurs and community tourism groups to plan and design tour packages and activities that respond to market demand. Scheduling, degree of difficulty, guide to visitor ratios, green management techniques, etc will be discussed.

A *Product Development Manual* will be custom designed for the region.

A *Product Development Manual* will be custom designed for the region that includes: a description of how to determine tour activities, preparation of resource inventories, package design, formation of local partnerships, estimating net costs, negotiating with receptive tour operators, use of Internet and email, etc.

- *Local Operator Training*

Limited training will be provided for a number of critical positions in the delivery of quality tour product, particularly at the community level. Emphasis will be placed on such jobs as:

- Community hosts
- Interpretive guides and naturalists
- Drivers and vehicle operators
- Folklore entertainers
- Security personnel

- *Preparation and Distribution of Interpretive Materials*

The new itineraries will focus on Berber culture and the abundant biodiversity and geology of the region. It is therefore important to have relevant informational available to the visitors as part of both their 'pre-trip information package' as well as for distribution throughout the itinerary. Funds will be available to collect and document information for distribution to foreign tour operators, travel agents and visitors.

Special funds will be required within the overall Regional marketing initiatives to assist small business and communities.

- *Product Marketing*

Special funds will be required within the overall Regional marketing initiatives to assist small business and communities to market their itineraries. This will enable local operators a degree of independence to both learn about promotion as well as be assured their products receive adequate attention.

Emphasis will be placed on familiarization tours for international travel agents, travel trade press releases, articles in specialty magazines and specialty organization newsletters, (e.g. bird watching, geology, etc).

B) Cost Estimates

The costs are as follows:

-- Itinerary Support	\$25,000
-- Tour Product Manual	\$20,000
-- Local Training	\$25,000
-- Target Marketing	\$30,000

\$100,000

ACTION 3.2 Agadir Tourism District Urban Design

A) Raison d'être and Description

Unlike many traditional beach destinations, the downtown core is relatively modern with most buildings constructed since the earthquake in 1961. As a result there is little reference to the rich architectural heritage of Morocco. As well many of the tourism related open spaces are out dated and no longer serve a purpose.

Many parks require both a redesign and an effective maintenance program.

It is therefore necessary to undertake an *Urban Planning and Design Study* of the tourism district.

This study could include recommendations for the following:

- Pedestrian walkways and circulation
- Animation and entertainment areas
- Heritage and folklore zone
- Overall landscaping (greening) and site furniture
- Park planning and design
- Architectural motifs and facades

The planning process should also identify how existing businesses could contribute to the upgrading and construction of the new urban features.



B) Responsibilities and Implementation

The urban design study would be under the direction of the City of Agadir who would collaborate with GRIT and the Chamber of Commerce. A national design competition could be considered with the winning firm receiving \$75,000.

C) Cost Estimates

Total cost would be:

-- Design competition organization	\$15,000
-- Design award	\$75,000
-- Sponsorship research	\$10,000
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	\$100,000

D) Final Cost Estimates:Phase 1-2-3

Total cost of the implementation of the Action Plan is \$911,000.

This is divided within three phases including:

Phase 1: Immediate-term	\$423,000
Phase 2: Short-term	\$288,000
Phase 3: Longer-term	\$200,000
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	\$911,000



4. CONCLUSION





Conclusion

Expanded product offering will appeal to the ecotourism, adventure travel, cultural heritage and learning vacation markets.

4.1 Repositioning Agadir-Souss Massa Drâa

These recommendations and cost estimates are strategically designed to reposition as a new and revitalized international tourism destination. It will build on the strength of its reputation (and infrastructure and human resource capacity) as a beach oriented product while integrating, over the next 10 years, tour product from the surrounding Souss Massa Drâa.

Expanded product offering will appeal to the ecotourism, adventure travel, cultural heritage and learning vacation markets. This product will have the advantage of attracting additional visitors and extending the length of stay at the existing Agadir hotels/resorts as well as developing a strong and dynamic industry in the surrounding territory.

His Highness Mohammed VI has identified tourism as a major economic pillar of Moroccan society. To achieve this opportunity for all citizens, it is necessary to have a tourism sector that embraces all regions of the country.

The Souss Massa Drâa offers the exceptional resource base to diversify the tourism product of Agadir while spreading tourism revenues to the countryside.

4.2 Creating a Planning and Development Model for Morocco

The initiatives outlined will serve not only the Agadir-Souss Massa Region but can also be a MODEL or prototype for the other regions of Morocco. Several components of this initiative can be shared with other regions including:

His Highness Mohammed VI has identified tourism as a major economic pillar of Moroccan society.

- Techniques and methodologies for collecting and analyzing data
- Profiles of the contemporary market segments that could be attracted to other regions
- Emphasis on Sustainable Tourism Development and the planning process
- Use of the Internet and customer Relations Management
- Protected Area (national Parks) planning and product development
- International norms, standards and green management practices

4.3 A Catalyst for Partnerships and Alliances

The tourism development of the Agadir-Souss Massa Drâa Region is also an exceptional example of partnerships between an international donor (USAID), local associations (GRIT), the private sector (individual hotels and tour operators, small business, RAM,), Chamber of Commerce, government agencies, conservation organizations and rural communities.

Alliances generated through the USAID Program will serve to strengthen the regions competitive position in the international tourism industry. This will have a positive impact on the institutional capacity, environment and economy of Agadir-Souss Massa Drâa for decades.

