

Touristification of the Moroccan oasis landscape: new dimensions, new approaches, new stakeholders and new consumer formulas

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Summary:

The Moroccan southeast, with its river water oases, has been utilised for tourism purposes since the country's "pacification", which took place in the 1930s. The "Road of the Kasbahs" marketing campaign refers to parts of the river water oasis of the Oued Todra and the Oued Dadès, as well as of the Oued Drâa. Until the end of the 20th century, a form of culturally oriented round-trip tourism was practised with a fair amount of success. However, the practice of tourism in the river water oasis of southeast Morocco has been changing over the past 20 years.

One prerequisite that allowed tourism to penetrate into more far-flung areas of the Moroccan river water oasis is the "asphaltification" of many former gravel roads and paths over the past 20 years – especially along the rivers and valleys in the Moroccan southeast. As a result, many previously more or less inaccessible valleys, with their river oases, became open to tourism. Besides this almost tangible spatial extension and quantitative growth following infrastructural circumstances, some additional, more fundamental changes can be observed in the touristification process of Moroccan river water oasis areas.

This article focuses on the different aspects of these new phenomena. It is based on preliminary findings from a fact-finding mission in the Drâa-Tafilalet in spring 2017 as well as on previous empirical work in the region performed by the authors. The goal of the text is to draw some conclusions on Moroccan tourism policy, which as yet does not really seem to be conducive to dealing with the fundamental changes and challenges on both the demand side and the supply side in tourism.

Résumé français:

Touristification du paysage des oasis marocaines: nouvelles dimensions, nouvelles approches, nouveaux acteurs, nouvelles formules de consommation

Le Sud-Est marocain avec ses oasis d'eau de rivière a été mis en valeur pour le tourisme depuis la prétendue « pacification » dans les années 30 du 20^e siècle. La formule de commercialisation de la « Route des kasbah » se réfère à une partie des oasis d'eau de rivière de l'Oued Todra et de l'Oued Dades, ainsi que de l'Oued Drâa. Jusqu'à la fin du 20^e siècle, une forme de tourisme culturel de circuit axé sur le patrimoine naturel et culturel a été pratiquée avec un certain succès. Au cours des 20 dernières années, cependant, la pratique du tourisme a changé d'une manière fondamentale dans les oasis d'eau de rivière du Sud-Est marocain.

Une condition préalable pour que le tourisme puisse toucher des zones plus larges des oasis d'eau de rivière marocaines est la « bitumisation ». De nombreuses anciennes routes et pistes de gravier ont été goudronnées au cours des 20 dernières années, en particulier le long des rivières et des vallées du Sud-Est marocain. Cette condition préalable réalisée, de nombreuses vallées anciennement inaccessibles avec leur oasis de rivière se sont ouvertes à la découverte par le tourisme. Mais en dehors de cette extension spatiale presque évidente et de la croissance quantitative due aux circonstances de l'infrastructure, des changements plus fondamentaux peuvent être observés dans le processus de touristification de l'oasis d'eau de rivière marocaine.

La contribution se concentrera sur les différents aspects de ces nouveaux phénomènes. Elle sera basée sur les conclusions préliminaires d'une mission d'enquête au Drâa-Tafilalet au printemps 2017 ainsi que sur d'anciens travaux empiriques réalisés dans la région par l'auteur. L'objectif est de rédiger des conclusions sur la politique marocaine du tourisme qui, jusqu'à présent, ne semble pas encore vraiment disposée à faire face aux changements fondamentaux et aux nouveaux défis de l'offre et de la demande dans le tourisme dans la région Drâa-Tafilalet.

1 Outline of the development of tourism valorisation in the Drâa-Tafilalet region

The pre-Saharan Moroccan southeast, south of the High Atlas – which became the Drâa-Tafilalet region in 2015 after political changes – is marked by the river oases of the Oued Todra, the Oued Dadès, the Oued Drâa and the Oued Ziz (Tafilalet). The region was opened up for tourism immediately after the so-called pacification in the 1930s. The valorisation for tourism purposes closely followed the infrastructural development of the region. The main axis for the domination of the region was the road between the principal military posts of Ouarzazate and Errachidia (formerly Ksar es Souk); these areas subsequently emerged as the main administrative, demographic and economic centres of the region. Various major military posts along this route, including Kalaat M’Gouna, Boumalne Dadès and Tinghir (see Fig. 1), set up what were known as “Gîtes d’Etapes”; this allowed them to host guests (first of all, of course, to host military and governmental personnel). As a result, this route became known as and marketed as the “Road of the Kasbahs” (Route des Kasbahs) in the 1930s, and has kept this name to this day. Extensions of this tourism “backbone” included two roads; one to Zagora in the Drâa Valley, and another to Erfoud and Rissani in the Ziz Valley (Tafilalet). This core tourism destination was utilised until the end of the 20th century in a form of culturally oriented round-trip tourism with a fair amount of success. The appeal of this product to tourists was mainly based on the oasis landscape and its unique clay architecture (for more details on this historical phase, see Kagermeier 2012). During the 1980s and 1990s, round-trip tourism was supplemented with the development of significant hotel capacity, mainly in Ouarzazate (see Kagermeier 1999) to induce longer stays at one place instead of changing hotels every day on a round-trip tour. After the initial phase, which was characterised by public investments as an advance provision to stimulate tourism activities, the latter phase of the construction of hotels has been mainly in the hands of private investors from outside the region.

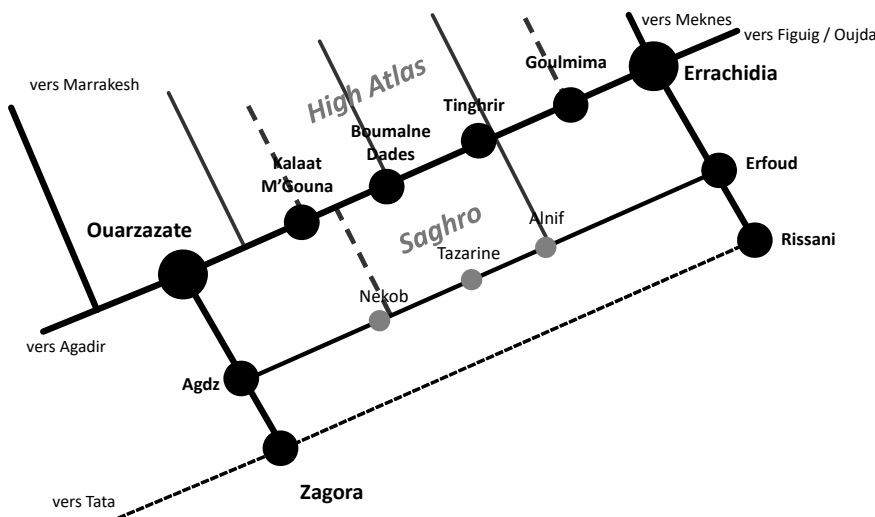


Figure 1: Spatial structure of the Drâa-Tafilalet region (Source: the authors)

The traffic infrastructure (accompanied by electricity and potable water supplies) was expanded at the end of the 1990s by a secondary axis parallel to the “Road of the Kasbahs” between Agdz in the Drâa Valley and Erfoud in the Tafilalet (see Fig. 1). The improved accessibility in this region south of the Jbel Saghro led to spontaneous investments by smaller private investors,

mainly in the settlements of Nekob, Tazarine and Alnif. Since neither the clay architecture nor the (very small) oases represented significant potential for additional growth, other options to attract tourists were exploited. In addition to fossils and petrographs which have been promoted for poten-

tial tourists, promoters have also offered off-road excursions into the desert landscape as well as hiking tours to the Saghro (see Lessmeister & Popp 2004). As Lessmeister (2005, 2008) has shown with his value-chain calculations, tourism activities in the Saghro at the end of the 1990s were still to a large extent dependent on the large tourism agencies in Marrakesh (and to a certain extent in Agadir), even if the accommodation facilities and some of the activities were mainly provided by small local stakeholders.

Since the turn of the millennium, a new phase of road infrastructure has been completed. This has included the upgrading and resurfacing of previously gravel roads that run perpendicular from the main axis between Ouarzazate and Errachidia. New roads entering and traversing the High Atlas Mountains north of the axis and the Jbel Saghro south of the axis were also built, representing a new phase of accessibility not only for the local population, but also for tourists. It may be possible to refer to this densification of the road network as “asphaltification”, to put emphasis on its role in catalysing the recent tourism development in the rural, formerly isolated parts of the region. On the other hand, some of the “traditional” tourism product elements appear to be faced with stagnation, if not decline and crisis. This is especially visible in the hotel infrastructure in Ouarzazate, which no longer corresponds to the formulas sought by the tourists who come to this region, and has seen a number of closings in recent years.

2 Recent tourism phenomena in the Drâa-Tafilalet region

Following the increased accessibility, the tourism offer in the Drâa-Tafilalet region has changed significantly in the past 20 years. Partly as a result of money from internal and external labour migration,



Figure 2: Newly built accommodation and restaurant facilities following the construction of asphalt roads (photos by the authors)

small stakeholders have been constructing accommodation and restaurant facilities (see Fig. 2) along the newly constructed asphalt roads. Like in former times, when increased accessibility almost automatically led to the emergence of tourism demand, this phenomenon has led to excitement bordering on hype in the region, with the hope that this new phase of development will fulfil the necessary prerequisite of accessibility and again bring in a new wave of tourists.

Changing demand characteristics

The expansion of tourism opportunities in the rural parts of the Drâa-Tafilalet region coincides with changing interests on the demand side of tourists. So-called “explorer tourists” (Griffin, Hayllar & Edwards 2008, p. 55) long for a new type of experiences. Such tourists can be characterised by a search for experiences that are (at least thought to be) authentic, and for activities and locations that are “off the beaten track” and outside the commodified “tourist bubble” (Judd 1999; Maitland & Newman 2009, Stors & Kagermeier 2013). The non-standardised offer of accommodation in the rural area of the Drâa-Tafilalet region seems to meet a specific diversified demand, with niche segments ranging from hiking and enjoying nature, to birdwatching and mountain climbing.

Changing marketing opportunities due to the internet

Another crucial condition for newly arising tourism offers in the previously isolated rural regions of the Moroccan southeast lies in the possibilities to advertise products via the internet and social media. The option to promote one’s own products without having to rely on tour operators or travel agencies makes small vendors less dependent on traditional interlocutors (see Popp & El Fasskaoui 2013, Popp 2017). Whether this occurs via their own internet websites, internet booking platforms or social media channels, even small stakeholders have been given the opportunity to promote and advertise their product directly.

At the same time, the possibilities to advertise products not only limited to the so-called “short head” of mass tourism but belonging to the “long tail” have been enhanced as well (Anderson 2006). The possibility to address a small number of special interest clients corresponds with differentiation on the demand side. Niche market segments can be targeted and served much more easily, with the internet facilitating the matchmaking process between supply and demand.

Collaborative consumption as a facilitating factor

Ever since Rachel Botsman and Roo Rogers’s “What’s Mine is Yours – How Collaborative Consumption is Changing the Way we Live” (2011) became a bestseller, the “sharing economy” has been hotly debated regarding its role in changing the tourism industry. While the sharing economy is mainly discussed and analysed in the context of urban tourism (Stors & Kagermeier 2017), it may nevertheless have an even greater impact on rural tourism. Internet platforms such as Airbnb are not only used in metropolises, be they in industrialised countries or the Global South. Even if the movement of the sharing economy started in metropolitan areas, it has since arrived in the most far-flung parts of the Global South, given the fact that internet availability is almost ubiquitous.

Originally conceived for individuals wishing to share “idle capacity” in their private homes – and thus responding to the visitor’s interest in unique experiences when living like/with the locals, these sharing platforms are also used like the ordinary commercial internet booking sites by small operators of accommodation facilities (see Fig. 3), enhancing the visibility of small-scale accommodation options.

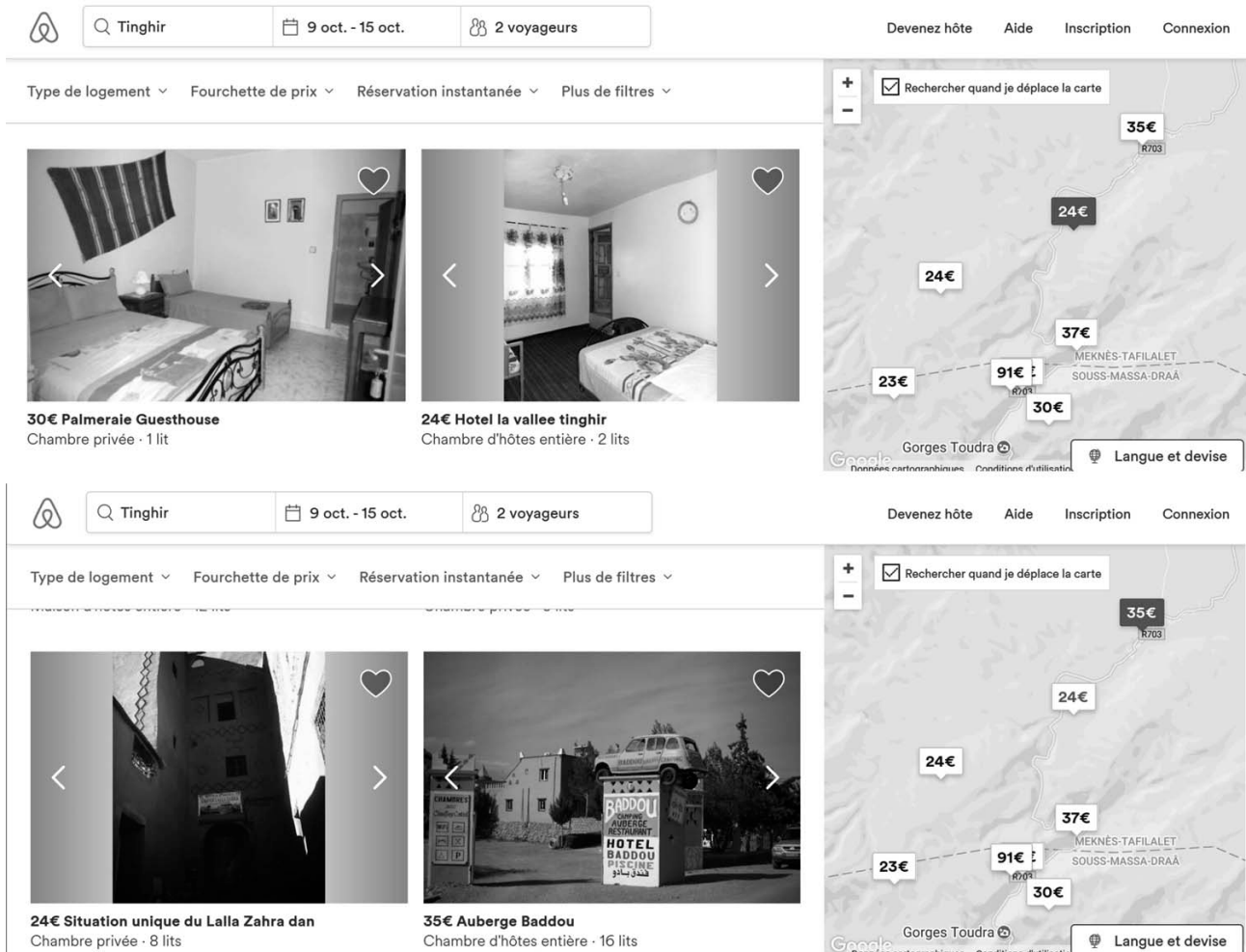


Figure 3: Airbnb listings from private persons and established hostels in the upper part of the Todgha Valley (north of Tinghir) of the High Atlas recently connected to the asphalt road network (source: www.airbnb.com, 10 Sept 2017)

Remarks on the current situation and performance

One might suppose that the tourism industry is performing well in the rural areas of the Drâa-Tafilalet region in light of a relatively favourable general situation in the market. During a fact-finding mission in spring 2017, the three authors attempted to evaluate the quality of the tourism offer in these newly opened areas, which were previously far away and barely accessible, and which only became easily accessible in recent years.

However, contrary to the assumption that accessibility itself would suffice to make tourism flourish in the rural parts of the High Atlas and Saghro Valleys, quite a few suboptimal aspects were observed.

1. The basic deficit is that some of the accommodation listing in rural regions seem **to fail to respect the basic prerequisites for market entry**. Sometimes developments are built where there is no natural or cultural potential in the surrounding area. Often this is investment from (returning) emigrants in their home village, or on their family's property. As Bencherifa & Popp (1990, 2000) already discussed regarding investments of (former) emigrants in the agricultural sector, this sometimes more closely resembles a "hobby" investment, driven not by actual market opportunities but by a sentimental will to return to the region of origin, while demonstrating some level of success achieved during their emigration period.

2. In a fair number of cases, there ***seems to be a lack of professional commercialisation***. This includes a variety of issues, such as inappropriate equipment of the facilities, below the basic standards desired by potential visitors, or an inadequate design that fails to attract international visitors. It might also include a lack of necessary knowledge and skills (whether for running or promoting the listing via the internet). In quite a few cases, the facility is run by employees or members of the family, while the actual owner does not maintain the necessary continuous interest in the business. This kind of ***absenteeism*** once the basic investment is made resembles traditional rent capitalism (Klaus-Peter 1983), which was already characterised as one of the central obstacles for economic development some decades ago.
3. One phenomenon somewhat related to rent capitalism and “hobby” investment is the fact that in some cases the investment seems to be more motivated by status-related motives than sound reflection and calculation of profitability. ***Status-related and demonstrative investments***, which have the intention of showing off the owner’s economic success and social status, are also visible, especially when (former) emigrants are the owners.
4. Finally, even in those facilities where the necessary tourism potential exists, a certain level of quality is achieved and the owner truly strives to actually run a business rather than simply invest in showy architecture, in most cases the business is run as an isolated establishment. ***Co-operation and interaction*** with other stakeholders, a core dimension of tourism (especially when it comes to small-scale, post-Fordist offers, see Kagermeier 2014a, p. 158 et seq.) are very rarely found in the region. The idea that the tourism product consists of not only a single accommodation facility and a restaurant, but comprises a whole chain of services during a holiday is rarely to be found. At the same time, the insight that competition in tourism occurs less between different stakeholders within a destination but much more between the wide choice of destinations is not widespread among the stakeholders.

This means that accessibility is a necessary but not a sufficient prerequisite for economically successful tourism development. In the following sections, these observations will be put in a more general framework of the situation of rural tourism in Morocco.

3 The role of lifestyle entrepreneurs

One of the common beliefs in economics goes back to the ideas of Schumpeter (1934) that the entrepreneur stands at the centre of innovation and growth. The *Gabler Wirtschaftslexikon* (2017) notes that an entrepreneur, as the motor of development, is generally characterised by the following typical attributes:

- A strong motivation for performance: the desire to exert the necessary energy and to master work tasks that are both challenging and achievable;
- A belief in feasibility: an ability to take responsibility for one’s own destiny and for the results of the activities, and that the entrepreneur can actively influence these;
- A desire for independence: the desire to be independent of authorities and to develop herself or himself;
- An orientation towards problem-solving: a clear focus on the key factors that influence a project, including handling non-routine tasks;
- A tolerance for risks and uncertainties: the tendency to suspend or end activities if it seems that an alternative method would be more likely to generate greater profits;

- A willingness to implement (the need for dominance): the willingness to direct others;
- Social adaptability: not only as a leader, but also and especially vis-à-vis customers and suppliers.

Contrasting these “ideal type” characteristics with the private stakeholders in the rural areas of the Drâa-Tafilalet region, it is quite evident that they do not fulfil these criteria. Very few of them show classical Schumpeterian-type features in their entrepreneurial activity. Even if small enterprises in tourism often carry hopes of being contributors to regional development and economic diversification, the “formal ideas of entrepreneurship seem to be embraced by only a few of them” (Ateljevic & Li 2009, p. 23). Furthermore, existing studies on tourism entrepreneurship emphasise that many of the tourism entrepreneurs are not profit-oriented or growth-oriented (Jaafar et al. 2011, p. 828). Even for those owners of tourism facilities who show a certain amount of internal economic success in their activities, it is important to recognise that various cultures’ attitudes to entrepreneurship range from prioritisation of economic motives to the granting of primary importance of non-economic motives (Shaw & Williams 2004, p. 99). The main motive of entrepreneurs viewed through the traditional economic lens is the pursuit of economic growth, while others are largely motivated by maintaining a particular way of life. This dichotomy between yield orientation and lifestyle motivation is central in the relevant literature, and has formed the basis of a discussion about lifestyle entrepreneurship. Lifestyle entrepreneurs can be characterised by:

- Underutilisation of resources and capital investment (Peters et al. 2009, p. 397);
- No clear marketing strategies, or no marketing at all (Shaw & Williams 1998, p. 248);
- Little or no formal qualifications (Shaw & Williams 1998, p. 248);
- High levels of education (Marchant & Moottiar 2011, p. 178);
- Enterprises financed by savings (Shaw & Williams 1998, p. 251);
- Motivations related to quality-of-life issues, rather than explicit financial or growth opportunities (Peters et al. 2009, p. 397);
- The regular use of extremely personalised criteria in managerial decisions (Dewhurst & Horobin 1998, p. 30);
- A concern with survival, as opposed to being overtly growth-driven (Di Domenico 2005, p. 112);
- The pursuit of personal interests or hobbies as dream fulfilment (Jaffar et al. 2011: 829; Peters et al. 2009, p. 397).

While we were unable to get deep into the subject during the fact-finding mission, and therefore we were only able to make some initial observations that need further empirical investigation, as a preliminary conclusion we tentatively point out that the hope that small private stakeholders might play a role as motors for economic development in rural areas does not seem not to be coming to fruition. Many small stakeholders do not have the necessary characteristics to run a business. And those stakeholders with the characteristics required to act as an entrepreneur seldom have the will to do so, preferring to take a lifestyle-oriented attitude. As such, the question therefore arises of who might instead act as a catalyst for tourism development in rural areas.

4 Governance aspects

The traditional Moroccan tourism product in the second half of the 20th century was based on a rather limited role of the public sector. The main key players were national and international tour operators and hotel chains, mainly focusing on beach-oriented tourism or the culturally oriented

urban tourism in the traditional imperial cities, as well as round-trip tourism (including the pre-Saharan southeast). This traditional product portfolio remained quite stable until almost the end of the 20th century. Since the turn of the century, more and more rural regions in Morocco have become open to tourism, with such intensity that two Moroccan experts have even spoken of a kind of “fever” (Berriane & Moizo 2014, p. 21) in rural regions. However, 15 years after the start of various rural tourism initiatives, the balance has been quite disillusioning. Weaknesses in the attempt to stimulate rural tourism in peripheral regions can be found on the side of the public sector as well as among the private stakeholders involved.

On the side of public stakeholders, it is possible to observe:

- 1) A traditional, hierarchical attitude by an authoritarian state;
- 2) An orientation towards large investors from outside the region; and
- 3) A lack of awareness of the need for governance structures among public stakeholders.

The small private stakeholders seeking to become involved in rural tourism:

- 4) Often lack the necessary capabilities to successfully run a tourism business; and
- 5) Have not established nationwide cooperative structures to tackle the individual weaknesses generated by leader-oriented approaches.

With new stakeholders entering the stage, which range from lifestyle entrepreneurs to semi-private supply by the sharing economy, the necessity to compensate for the lack of professionalism on the destination level as well as the ignorance of the overall conditions is becoming more and more pressing.

The current new trend in tourism, with “explorer tourists” looking for perceived authenticity “off the beaten track”, getting in contact with the locals and sleeping in unique accommodation facilities has not only influenced metropolitan tourism (Stors & Kagermeier 2017). As a peer-to-peer marketing platform for accommodation, Airbnb has enabled individuals in even the most remote and isolated corners of pre-Saharan Morocco to present themselves as proprietors of accommodation in rural areas. As this tendency continues into the future, more and more stakeholders with less and less

professional experience will present themselves on the tourism market – especially in rural regions. For this reason, the necessity to establish governance structures that are adequate for this variety of small and micro-entrepreneurs and that support them to establish themselves in a more and more competitive environment with ever-more demanding clients is becoming increasingly urgent.

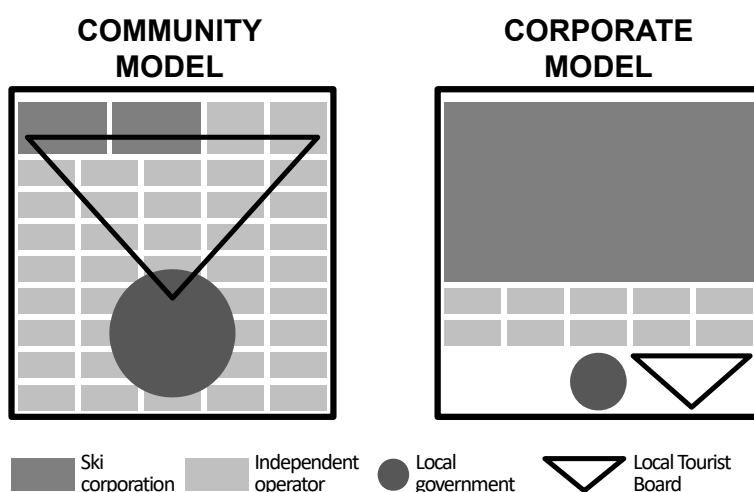


Figure 4: Ideal types of organisational structures in Destination Management: Community Model and Corporate Model (Source: The authors, following Flagestad & Hope 2001, p. 452)

From a governance point of view, the destination management models of Flagestad & Hope (2001; see Fig. 4) are useful. They outline a “Corporate Model”, dominated by major interna-

tional and national private stakeholders (hotel chains and tour operators) with only a minor role for local and regional tourist boards (as destination marketing and management organisations) as well as the public sector (in its governing capacity). This operates in contrast to the “Community Model”, where a multitude of small local and regional private stakeholders need comprehensive destination marketing and management organisation as well as public stakeholders who can assume the leadership role in a destination (see Beritelli & Bieger 2014 or Kagermeier 2014a).

Even if NGOs have attempted to intervene in some cases to compensate for the deficits of the public steering function, their effect has been quite limited (for more details, see Berriane & Aderghal 2012, Berriane & Moizo 2014 and Kagermeier 2014b). One of the few examples where a grassroots NGO has been established that has had a certain impact is the “Réseau de Développement du Tourisme Rural” (RDTR), operating in the Sousse-Massa and the western part of the Drâa-Tafilalet region. The RDTR was founded in 2011 by a few tourism professionals and academics with the encouragement of the regional council. Its objective was to bring together small tourism stakeholders in the rural milieu of the region in order to “structure and organise the rural tourism sector, organise and manage all common interests and promote the practices of rural tourism (promotion, communication, marketing assistance), promote the exchange of good practices, ensure the quality of rural tourism products, participate in the development of sustainable and responsible rural tourism, and build partnerships with regional, national and international tourism stakeholders” (RDTR & Afkar 2013, p. 6, translation A. Kagermeier).

The primary purpose of the network is to strengthen the performance of small tourism activities by building a network focusing on capacity building and providing the service orientation necessary to successfully participate in the tourism market – which is marked by a high degree of competition. In addition to the development and promotion of the rural tourism product itself, a focus on sustainability has been an integral part of the RDTR’s mission from the very beginning.

Soon after it was founded, the RDTR had already had around 70 members (RDTR 2012, p. 4), including more than 40 tourism professionals who owned their own accommodation business (gîte, guesthouse, campsite, etc.). During the first few years, a wide range of activities was launched. The RDTR (co-)organised several workshops and conferences (RDTR 2012, p. 12), focusing mainly on three different aspects: first, the creation of support among the different private and especially public stakeholders in the region; second, the awareness and development of professional know-how among their members; and, third, the establishment of a network with other national and especially international actors from NGOs, public bodies and academia. The authors of this article have been involved in these kinds of activities in recent years as national and international members of the academic tourism community.

At the same time, a number of marketing activities were initiated – especially using internet-based and social media tools (RDTR & Afkar 2013), which are inexpensive and easily accessible, and thus have low barriers to entry. In spite of these activities, the number of members stagnated, so the optimistic hope that membership would increase from 70 to an estimated 200 by 2013 (RDTR 2012, p. 4) was never fulfilled. At the same time, the different activities of the network, ranging from training approaches, to internet marketing activities, to the creation of a quality and ecologically friendly seal of approval during the first years of its existence waned after the first euphoric steps (for more details, see Kagermeier, Amzil & Elfasskaoui 2018). It is difficult to evaluate the reasons for the stagnation in the number of members, but the phenomenon that an NGO activity in Moroc-

can tourism would start with an enthusiastic and euphoric take-off period and decline after a certain period of time is quite common (see Berriane & Moizo 2014). It can be supposed that this is some kind of structural effect due to the situation that an NGO alone, without complementary assistance and interaction with public bodies, does not seem to be able to compensate for the deficiencies in governance deficits that are apparent in Morocco.

5 Conclusion

Following the amelioration of the accessibility problem by the construction of asphalt roads in what were previously rather isolated areas, the pre-Saharan southeast of Morocco has seen considerable investments in tourism facilities in recent years. The core question of this article has been if and to what extent this has already led to actual, self-perpetuating development of a comprehensive tourism product. During a fact-finding mission in spring 2017, however, it became clear that isolated individual investments by small-scale private stakeholders are still far from establishing an adequate tourism product that can successfully compete on the international market. In addition to a lack of professionalism on the part of many of the stakeholders, the fact-finding mission revealed that even those investors who might be able to function as a leaders and leverage their investment for more dynamic development tend to show an attitude toward their business that can primarily be characterised as lifestyle entrepreneurship.

At the same time, there are no signs that civil society actors might be able to fill the gap in the suboptimal leadership in small-scale rural tourism; the example of a tourism network in the Moroccan south, which seemed to be promising at the beginning of its activity a couple of years ago, has shown that NGO structures find it hard to guarantee continuity in their activities, even if enthusiasm might be quite high at the beginning.

When viewing the example through the lens of governance structures, it has to be stated that no empirical evidence indicated that the necessary change in rural tourism towards a more non-hierarchical steering mode with a high density of interaction between the multitude of small local and regional private stakeholders might develop without intensive public sector intervention. At the same time, the question of the optimal relationship between public and private stakeholders in rural tourism remains open.

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