

Outbound Tourism in Developed Countries: Analysis of the Trends, Behavior and the Transformation of the Moroccan Demand for International Travels

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Abstract—Outbound tourism in Morocco, as in the majority of developing countries, reveals some of the aspects of inequality between the north and the south. Considered by some researchers as one of the facets of the development crisis, access to tourism and especially international tourism is a chance for a small minority with financial means, while the vast portions of the population dream rather of immigrating to a developed country for the sake of improving their standard of living. The right to travel is also limited by visa requirements, procedures in host countries, security and technical measures and creates discrimination in the practice of tourism. These conditions do not seem to be favorable to the democratization of the practice of international tourism for the populations of the southern countries. This paper is a contribution to the reading of the trends of outbound tourism in developing countries through the example of Morocco. It highlights the different aspects of Moroccan outbound tourism, destinations and the behavior of tourists through an analysis of the offer of a sample of 50 travel agencies. In the same vein, it offers a reading grid of the possibilities offered for the development of outbound tourism and the various existing obstacles to the democratization of international outbound tourism in the southern countries. This reading reveals the transformation in the behavior of Moroccan international tourists as well as the profound changes in Moroccan society, through a model of statistical analysis.

Keywords—Demand, Hajj, Morocco, outbound tourism, tendency, Umrah.

I. INTRODUCTION

TOURISM, along with agriculture and other industrial activities, attracts the attention of local and international tourists and is considered as one of the most significant and strategic sectors in Morocco. The latter is featured by its natural and cultural assets that prompt more than 11 million tourists who spend about MAD 62.3 billion annually to consider it as an interesting destination [28]. It is also one of the jobs' providers with 515,000 direct jobs in 2016, which is approximately 5% of jobs in the overall economy due to its significant contribution to boosting wealth, mitigating unemployment and poverty in different Moroccan cities that witness the arrival of thousands of tourists weekly and millions of visitors annually. Tourism represents an opportunity for Morocco to obtain its needs from foreign

currency and tax revenues. It is also an opportunity for local people to earn a stable income and employment and a chance to improve the country's basic infrastructure requirements such as railways, airports and other prerequisite utilities that local people request in their daily life.

Outbound tourism is certainly a crucial factor that can hamper the progress of domestic tourism, depriving it of resident tourists who opt for holidays abroad. These tourists are, simultaneously, potential market shares that national tourism operators can regain by improving domestic products [28]. The economic significance of tourism is of paramount importance to the country of origin and destination as well. The destination benefits from tourism revenues, offering new job opportunities in the sector, and the infrastructure in addition to several other socio-economic gains [16].

The significance of tourism is documented in the United Nations World Tourism Organization report in 2014 revealing the contribution of the sector to the world economy. According to the report, tourism contributes about 9% of the global GDP and \$ 1.4 trillion international exports. The value of tourism and its socio-economic benefits prompt the recognition of the different factors determining tourism demand behavior [17]. A number of studies shed light on the macroeconomic influences of outbound tourism, including an increase in the toll of unemployment along with foreign currency loss [37]. Furthermore, it is pivotal to consider the tourist's mood and emotions in outbound tourism. To elucidate, religion prompts millions of tourists to attend their religious shrines and sites annually seeking spiritual comfort. In 2012, as an example, 4.3% of tourists, interested in outbound tourism, sought their pilgrimage in Saudi Arabia [25]. Therefore, it is essential in this study to highlight the role of behavior, mood and sentiment in outbound tourism amongst Moroccan tourists.

II. OUTBOUND TOURISM'S VARIABLES

Identifying the different factors that affect outbound tourism consumption is of great importance to both researchers and decision makers. Recognizing these factors would certainly help improve the services provided to outbound tourists, besides understanding the difficulties. Income is accounted for as one of the essential factors in outbound tourism whereby researchers rely on gross national product per capita [9]. Given the fact that tourism is a luxurious product [40], the tourist's annual revenues might be either a supportive or impeding variable. The tourist opts for a

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destination that attracts their attention and suits their financial revenues.

According to a study carried out by the Ministry of Financial affairs in Morocco in 2014, the number of Moroccan tourists abroad exceeded 2.3 million in 2012 (27.4% in France, 21.7% in the Costa del Sol, 4% in Saudi Arabia and 3.4% in Turkey), whereas only 1.5 million departures were recorded in 2000. This ratio corresponds to an average annual growth rate of around 3.6%. This pace places Morocco behind Spain, whose growth in outbound tourism has averaged 9.5% per year over the period (2000-2012) [24].

Also, the number of Spanish tourists who preferred to spend their holidays outside their national territory was close to 12.2 million in 2012. Over the same period, Tunisia, Egypt, France and Turkey are all positioned behind Morocco. The number of tourists issued by these four countries in 2012 reached, respectively, 2.3 million, 4.1 million, 25.4 million and 5.8 million tourists [24]. The ratio between tourist departures and the sum of flows from receiving and emitting tourism reached 20% in 2012. This rate gives Morocco the fourth rank behind France (23.5%), Egypt (27%) and Tunisia (28.5%) [24]. These destinations and others are preferred by Moroccan tourists due to the latter's income in addition to other socio-economic variables. Other factors encompass tourism's price in the destination and the prices of other destinations [41]. The low value of the destination's currency compared with the American Dollar or the Euro is a determinant variable in seeking a particular destination [3]. The cost of the means of transportation is another effective variable as the expensive cost of flights and local transportations might deter the tourist from choosing a destination [43].

Climate conditions seem to be of great concern in outbound tourism [19]. The bulk of tourists worldwide are obsessed by outdoor recreation activities and different climate environments and atmosphere. This trend prompted scholars in 1950s to shed light on climate and on the various recreation and tourist activities as well [23], [33]. This interest in tourism was behind the organization in 2007 of the Second International Conference on Climate Change and Tourism by the United Nations World Tourism Organization (UNWTO) and the United Nations Environment Programme (UNEP) in Davos, Switzerland. The conference that witnessed the presence of more than 450 delegates and NGOs' representatives indicated the salience of climate which is viewed as a key for the success of the tourism industry.

A number of studies shed light on the significance of climate in taking the decision to visit a specific destination [12]. The latter revealed in their study the reliance of certain destinations on climate, especially in the Caribbean region. These beach destinations attract the attention of the tourist obsessed by the warmth of the climate and the likelihood of enjoying certain beach activities [13]. Nature-based tourism activities take place outside the tourist's residence and, thus, can be deterred by rain, fog, wind or other weather conditions [18]. Various studies demonstrated that climate change and weather conditions might affect the tourist's decision to visit a specific destination and to perform certain activities [11].

Hamilton and Lau indicated in their study, the crucial role of climate as the third most influential factor behind choosing a destination [10].

A vital variable that should be considered is related to immigration. The 21st century has witnessed a growing trend towards investigating the relationship between immigration and outbound tourism, incorporating the studies carried out by [42], [15], [34]-[36], [7], [22].

Seetaram and Dwyer (2009) and Seetaram (2012a) tried to examine the relationship between inbound tourism flow and while Seetaram (2012b) highlighted the value of outbound tourism flow [34]-[36]. The former found a strong correlation between the number of foreign-born migrants residing in Australia and the flow of inbound tourists whereas the latter demonstrated the influence of foreign-born migrants on the flow of outbound tourism. A study, carried out in the United States of America, explored the positive impacts of foreign-born immigrants on the number of total arrivals seeking to visit their relatives in the host country [42]. Massidda and Piras studied the effects of regional migration on domestic tourism, revealing an increase in the flow of inbound tourists in Italy [22].

Moroccan immigrants are said to be among the most crucial immigrants not only in France but in various countries. It is estimated recently that more than three million Moroccans live outside Morocco [4]. It is estimated that more than 90% of most immigrants reside in Europe, whereas the others live in some other countries all over the world. Moroccan immigrants constitute the second largest population of non-European immigrants after the Turkish community [4]. They are expected to form the largest and biggest group living in Europe in the next decades, because the Turkish community in Europe is currently stagnating [5].

The rates of Moroccan immigrants vary from one country to another. To illustrate, over 1,131,000 Moroccan migrants live in France. This number is considered as the highest among all immigrants. Also, another large community resides in Spain with more than 547,000 immigrants. The other immigrants differ in number with 379,000 in Italy, 285,000 in Belgium, 278,000 in the Netherlands, 130,000 in Germany, 100,000 in the United States of America, 60,000 in Canada, 120,000 in Libya, 80,000 in Algeria and around 4000 in Asia and Oceania [4].

III. SPENDING BEHAVIOUR OF TOURISTS

Tourists' spending is to a large extent germane to their psychological and emotional status [6]. Psychologists postulate that the stability of the person's emotional state affects their spending patterns positively and prompt them to take uncertain decision based on optimism [20]. Schwarz and Clore also found the direct effects of the positive mood on the spending of the human being [32]. Other studies also shed light on optimism and the positive mood revealing that household expenditure decision is largely influenced by the income and the emotional status of the person [21], [26].

A number of studies have been conducted since 1999 to manifest the correlation between tourists' expenditure and

their emotional status. A study in New Zealand, Austria and South Africa examined the value of mood and emotions in taking the decision to travel to a particular destination [8]. Another study attempted to investigate the importance of mood in assessing certain tourist products by cruise passengers and found out that tourists with negative moods expressed their dissatisfaction regarding the products and service [38]. Bigne and Andreu conducted a study and demonstrated that the investigated tourists were in good mood and showed their willingness to spend and consume more products [2]. In 2007, Kwortnik and Ross highlighted the significance of positive emotions in consuming new product by tourists [14].

In conjunction with the tourist's individual mood, other studies investigated the collective mood and its impact on the tourist's behavior [31]. Nofsinger also highlighted the value of social mood among consumers, investors and managers as well, suggesting that the collective mood of consumers (positive or negative) is a determinant factor in their socioeconomic behavior [27]. Olson examined the fiscal status of the society and its influence on the consumer's expenditure noting that the financial situation of the society is reflected in the spending behavior of the consumer as well [29].

IV. MOROCCAN OUTBOUND TOURISTS

As aforementioned and according to a study carried out by the Ministry of Financial affairs in Morocco in 2014, the number of Moroccan tourists abroad exceeded 2.3 million in 2012, whereas this number decreased gradually between 2013 and 2016. In 2013, 2.2 million Moroccan tourists left the national boundaries towards the most renowned destinations and simultaneously this rate decreased to reach 1.8 million in 2014, 1.9 million in 2015 and 1.8 million in 2016 [24], [30]. Nevertheless, the lack of accurate data and statistics regarding the spending of Moroccan outbound tourists is an incentive to shed light on these destinations as well due to their similarities with Morocco.

The study conducted by the Ministry of Financial Affairs in Morocco in 2014 focused on the geographical structure of tourist departures from Africa to tourist accommodation establishments in the countries of the European Union based on the hypothesis of the existence of a certain similarity between this structure and that of tourist departures from Morocco to the countries of the Union. Thus, and according to the tolls provided in 2012, 22.3% of African tourists have chosen to spend their vacation in France. Spain received 18.4% of African tourists, while Italy, the United Kingdom and Germany captured 14.5%, 13.3% and 8.4%, respectively, of tourist flows from Africa. The shares of other European destinations remain low and do not exceed 4.2%. Regarding the flow of Moroccan tourists recorded at the French border, the latter posted an average annual growth rate of 9% between 2005 and 2012, from 346.400 to 635.100 tourists. The ratio of this flow amongst Moroccan outbound tourists varied between 15.4% and 32.8% [24].

On the Spanish side, and taking the example of a flagship destination of the country, namely the Costa del Sol, the

number of Moroccan tourists who visited this region reached 500,000 in 2012, as opposed to 342,800 recorded in 2009. This corresponds to an average annual growth rate that exceeds 13%. Over the same period, the weight of these departures varied between 13.8% and 21.6% [24].

With regard to Turkey, an annual growth rate of 15.3% was documented over the period (2008-2012). The number of Moroccan tourists who opted for the Turkish destination increased from 44,000 in 2008 to 77,800 in 2012. It is essential to take into consideration that Istanbul remains the favorite Turkish destination for Moroccan tourists who are attracted to cultural tourism. This city has grabbed the attention of more than 90% of tourist departures from Morocco to Turkey in 2012, followed by Antalya, Izmir and Muğla whose respective shares were 4.1%, 1.9% and 1.6% [24].

The collapse of the oil trade price under \$70 and its dire impact on countries whose reliance on the petroleum industry led many oil producing countries to vary their products and bands, including Saudi Arabia. The latter receives millions of visitors interested in making their annual pilgrimage (*Hajj*) [39]. The lucrative benefits of tourism and the religious characteristics of Saudi Arabia as the heart of the Muslim world prompted decision makers to consider the revenues of *Umrah* and *Hajj*. In 2014, the country benefited from SAR 68.4 billion (approximately US\$ 18.30 billion), which counts for 2.4% of the country's total GDP and it is expected to increase by 4.3% to reach SAR 1,110.8 billion in 2025 [1]. The significance of tourism in Saudi Arabia stems from the number of it hosts and their expenditure while practicing their religious rituals. The country generated more than US\$ 9.1 billion from 15 million foreign visitors and it is estimated to benefit from US\$ 17.49 billion in 2020 [44].

Moroccan tourists are not an exception as thousands of Moroccan pilgrims enter Saudi Arabia. According to the General Organization for Statistics in Saudi Arabia, 34,162 Moroccan pilgrims practiced their pilgrimage in 2017. This number has so far witnessed a drastic increase owing to the availability of the means of transportation. Each Moroccan pilgrim, as is the case pilgrims from different countries, spends at least US\$ 3,000 while fulfilling their rituals, incorporating the expenses of accommodation and transportation along with purchasing gifts and souvenirs from this sacred corner for Muslims [24].

V. METHODOLOGY

The review of the literature of the existing background and contributions about the subject to reveal the viewpoints of different researchers who shed light on inbound and outbound tourism over the world helped construct the research framework in a clear way. The absence of studies regarding the subject in Morocco makes this research amongst the pioneering studies in treating outbound tourism in Morocco. This field of research is also featured by the lack of official data since the concern of policy makers is oriented toward receptive tourism. Therefore, we collected data scattered in the official reports, laws and policies of the Ministries of Tourism,

Finance, etc., as well as in the statistics of some international organizations and the consular services of some countries.

Other data were collected from literature, journals and articles. The analysis of this collected data provided a first insight on outbound Moroccan tourism, the preferred destinations, and the behavior in terms of consumption and helped also the observation and deductive approaches to explain the motivation of travelers and some specificities and limitations of this niche of tourism. It is also of paramount significance to mention that the qualitative and quantitative methods are used in this study.

The empirical side of this research is based on a demand field study and an analysis of the offer of travel agencies through catalogues and websites. In this paper, we will present a summary of the analysis of both studies.

The self-administered questionnaire of the field study was designed in French to collect data owing to the specificities and features of Morocco which relies on French in the bulk of administrations in the public as well as the private sectors. Personal questions about gender, age, income, place of residence, etc., constitute the first part of the questionnaire, while the second part is designed to get data about the typology of trips, the criteria of choosing travel destinations and the tourist's behavior before and during the trip. The field study targeted to survey a sample of 200 Moroccan outbound tourists who had effectively done at least one trip abroad. To simplify the collection of data, the questionnaires were distributed in travel agencies from 15 March to 30 April 2018. Finally, 150 questionnaires were kept, while the others were incomplete or not clear to codify. The questionnaires were analyzed using IBM SPSS statistics Base 22.0.

The analysis of the offer is based on the Moroccan travel agencies outgoing offers on the websites and different catalogues. Ten travel agencies were chosen according to criteria essentially germane to the reputation, the importance in the market and the volume of sales made. The presence on the web and social networks is another criterion that this study prefers despite the absence of e-tourism sites operational in Morocco. The sites are essentially of the showcases, which offer packages and that are moving toward the premises of the agencies chosen.

VI. ANALYSIS AND DISCUSSIONS

A. Analysis of the Outbound Offer of Moroccan Travel Agencies

The development of travel agencies is concomitant with the Moroccan National Tourist Office 2010 Vision despite the increased attention and complication of the different stages and procedures for the creation of travel agencies [25]. In fact, the attention goes from 100K to 200K. According to the Ministry of Tourism, there are 979 travel agencies and 327 and operational branches [24].

The travel agent business grew significantly between 2010 and 2016, with the opening of 319 new branches in six years, representing an annual average of 53.16%. The business remains very attractive since the promoters invest in the

development of their branch networks. The latter increased from 199 in 2010 to 327 in 2016. This means the inauguration of more than 128 branches during the same period and an annual average opening of 21.33 branches. Some traditional agencies have a well-developed network, Atlas Voyages and Transatours with 17 agencies for the first and 10 for the second.

TABLE I
EVOLUTION OF THE OPENINGS OF TRAVEL AGENCIES IN MOROCCO [28]

	2010	2011	2012	2013	2014	2015	2016
Headquarters	660	711	744	787	855	908	979
Branches	191	209	216	236	261	293	327

Since 2010, the pace of openings has accelerated in response to the proactive vision. The number of travel agencies grew by 8.05% per year, from 660 branches to 979. The pace of branch openings has also accelerated mainly in the cities of Rabat, Casablanca, Agadir and Marrakech. The result is a strong spatial concentration of travel agencies in these cities; therefore, Casablanca hosts 27.68% of travel agencies, followed by Marrakech with 20.42%, Rabat with 8.69%, and Tangier and Agadir with respectively, 6.33 and 6.74% [28].

The importance of Casablanca is mainly due to the corporate and business tourism activity, as well as to the salience of the city in terms of economy and consumption as it is the largest consumer market. Rabat is also justified by the importance of administrative activity; the bulk of the activity is essentially generated by the concentration of administrations and public and semi-public companies. It must also be said that 60% of the Moroccan urban population exists in the Kenitra-Casablanca axis due the concentration of wealth and offers that consumers need. The availability, in fact, of wealth and a large part of the middle class that seeks leisure makes the region more active and demanding.

The closures of travel agencies also reveal the difficulties of the promoters to ensure a sustainable activity. The observation allowed noting that several travel agencies do not respect the operating conditions and work with a reduced staff usually made up of members of the same family. In Marrakech alone, a study revealed that only 60 out of 150 travel agencies in 2013 were able to survive an international environment after the financial crisis and the Arab Spring [28]. These difficulties aggravated with the hegemony of tour operators and the development of direct sales as well as the pressure of a very important informal sector. It must be said that more than 85% of Moroccan travel agencies are oriented to the local market and 15% to the receptive market. This justifies in a few ways the large number of openings in recent years. Hajj and Umrah are the flagship products of the Moroccan travel agencies owing to important profit margins.

Thus, the majority of the travel agencies surveyed make proposals for domestic tourists. All of them see this orientation as a chance, despite a market that they all consider to be very limited, but which offers very significant expansion possibilities. The positioning of Umrah is cited by 96% of

respondents, only two agencies in Casablanca are not interested in this product for reasons of consultation on other businesses (MICE and corporate). These two positionings, as that of the receptive, are the least mentioned by our respondents and appear exclusively to be limited to agencies in Marrakech and Casablanca. In short, all agencies that are not located in the Kenitra-Casablanca perimeter claim to position themselves exclusively to Umrah and other receptive products. The lack of economic fabric in their cities limits their ability to develop corporate products, ticketing or even receptive tourism.

For a long time, the national market was not an interesting orientation for Moroccan travel agencies and even for the Moroccan authority. All the efforts and the policy were oriented towards receiving tourists and the international market without considering that the tourist offer is not at all adequate for a tourist who still travels with his family and for whom vacations in hotels are off budget. Nevertheless, travel agencies find in this market a new chance, mainly for those who do not invest in the receptive. Outbound tourism is a very promising direction, especially since the market is demanding and is very close, requiring little marketing from local travel agencies.

The analysis of the agencies' offer that was conducted involved 10 travel agencies; six of them are located in Casablanca, two in Rabat and two in Marrakech. As aforementioned, Casablanca stands out because of the size of its population, the level of households' lives and, the importance of travel agencies. All the agencies have a service dedicated to outgoing tourism. They employ in general eight employees (six out of the 10 agencies studied).

Outgoing packages are available for some throughout the year, but they depend on the destination. This is the case of the European "à la carte" destination that takes the form of the city-break in the main cities such as Paris, Barcelona, Madrid, Rome and Venice. The increasingly low prices of flights and the existence of low-cost flights serving these destinations make them highly demanded products. Nevertheless, the packages are very light to attract more customers. The agencies that actually make an offer to their cities are located in Casablanca and Rabat, others work on demand.

Turkey has become a special case in terms of tourism offer, and especially Istanbul, which is the most requested and the most proposed in different formulas. The analysis of the offer reveals the dominance of packages with flight, hotel and transfers with an average price between MAD 6,000 and MAD 7,500 in low season period and beyond MAD 7,500 in high seasons (school holidays and summer). All the agencies make group departures and also offer à la carte services such as excursions and visits, including visits to Istanbul, Bursa, and a cruise of the Princes' Islands or on the Bosphorus. Turkey is the first destination programmed by Moroccan travel agencies. The absence of a visa imposition at the entrance also encourages the flow of tourists.

The volume of Turkey's supply is considerable. The destination is available in several packages concentrated in Istanbul with a varied accommodation offer in several

districts, especially Taksim and Laleli.

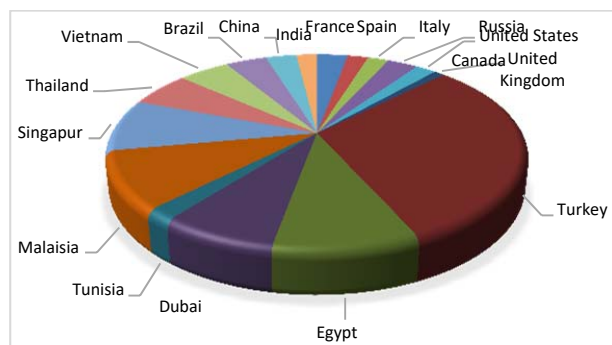


Fig. 1 Outgoing destinations proposed by Moroccan travel agencies

Egypt comes in second position of the proposed destinations. The packages, programmed during the school holidays and the summer period, offer a stay in Cairo or combined Cairo-Sharm al-Sheikh, Cairo-Hurghada or Cairo with a trip in the Nile River to Luxor. The packages are basically with a bed and breakfast package with sightseeing options. Here too, the price variable is important to allow proposing an attractive package. The falling prices, due to instability since the Arab Spring, have not generated much demand from the highly demanded Moroccan market. Political instability, mainly linked to a phase of indecision, concerning the imposition of a visa and after the election of Morsi, has given a boost to the destination.

Dubai is also a destination that is among the packages scheduled during the year and especially during the shopping festival (28 December to 28 January 2018). The packages are also limited to basic formulas with excursions: Burj Khalifa or Burj Al Arab tours as well as the cruise in the Dhow or in the desert. Dubai is a destination sold to individual customers. Groups are on demand.

The rest of the destinations are also proposed during the summer period. All Asian destinations without exception, including Thailand, Malaysia, Singapore, Vietnam, Laos, Japan, South Korea and India in addition to those of the Americas, particularly Brazil and Mexico, are the most crucial destinations offered by Moroccan travel agencies. Asian destinations are mostly proposed during periods of low season because of the climate, monsoon period and excessive heat. The number of offers for Thailand, Singapore, Malaysia and sometimes Bali is the largest. A very small clientele chooses these destinations whose cost remains high.

In sum, the analysis of the outgoing offer of Moroccan travel agencies reveals some particularities. In fact, the offer is dominated mainly by a simple and basic suggestion which takes the form of city-breaks to European destinations that are mainly à la carte to individual customers with no organized trips to these destinations. Certain destinations like Istanbul and other destinations in Asia and the Americas are preferred in low season. Packages are often lightened with on-demand visits even for customers looking for exoticism.

B. Analysis of the Outbound Demand in Morocco

The results of our survey reveal that women dominate men (72% vs. 28%). The age group 28-45 years is the largest with 59% of respondents followed by 45-65 years with 23%. Respondents under 28 years are a minority with only 3% of the respondents, while those over 65 years represent 14% of the respondents, 21 people in total. The sample surveyed is composed of mostly married tourists (68%) with or without children compared to only 20% of single people, 5% are women. Divorced tourists represent 5.33% of the cases, while widows are more important with 10 of the interviewed (6.6%). These elements will be very consequent in overseas travel buying behavior as will be illuminated. The level of study of the tourists surveyed varies from baccalaureate +2 to baccalaureate +8 (doctorate degree). The propensity of those with a master's degree is preponderant with 48% of respondents, followed by people who have a license degree with 36%, while tourists with the level baccalaureate +2 is low with 6%, as well as people with a PhD level that represent 2%. The rest of the respondents did not fill in this question.

Resident tourists in Casablanca are more important and represent 45.33% of investigators. This is mainly due to the way in which the questionnaires were distributed and in which we privileged the economic capital, as we explained above, for reasons of economic importance and the significance of the purchasing power of the cities, households that are generally of better-off social classes. Rabat comes in second place with 32%, followed by Tangier, Marrakech and Temara with respectively, 12%, 7.33% and 3.33%.

TABLE II
TOLLS OF MOROCCAN OUTBOUND TOURISTS

	Number	Percentage
Gender	150	100%
Male	42	28%
Female	108	72%
Age	150	100%
-28 years old	5	3,33%
28-45 years old	89	59,33%
45-65 years old	35	23,33%
+65 years old	21	14%
Marital status		
Single	30	20%
Married	102	68%
With children	77	75,5%
Without children	25	16,7%
Divorced	8	5,33%
Widowed	10	6,6%
Study level		
High school diploma (Bac)	150	100%
Two years university degree (Bac +2)	9	6%
Bachelor degree (Bac +3)	54	36%
Master's degree	72	48%
PhD	3	2%
Did not answer	12	8%
City of residence	150	100%
Casablanca	68	45,33%
Rabat	48	32%
Tanger	18	12%
Marrakech	11	7,33%
Temara	5	3,33%

The analysis of the field study demonstrates the vast majority of women who visit travel agencies compared to men

(65.5% against 30.5%). Of these, 72% are married, which means that they are responsible for the details and preparation of trips for families. However, this propensity drops to less than 10.5% when it comes to single people or couples. Single women travel less than men, revealing the situation of women, who are still very much conditioned by the socio-economic situation, on the one hand, and the cultural situation on the other. While travel conditions to country destinations, especially Gulf countries, limit the travel of single women who are not accompanied by a *Mahram* (a man, a male relative, who cannot, according to the Shariah, marry this woman).

In terms of financial resources, the respondents were spared by the question. Only 53% of the respondents were able to answer this question. The range of declared income varies between MAD 10,000 and MAD 15,000 for 32% of respondents, against 45% with between MAD 15,000 and MAD 20,000. Only 12% reported an income above MAD 20,000, while the rest assessed their income between MAD 6,000 and MAD 10,000. The importance of income explains to a large extent the type of the chosen trip, the destination and the level of comfort during the trip (category of the hotel and chosen formula).

According to the respondents, the transition to the travel agency is mainly conditioned by the need to have a travel advisor, for all respondents. The importance of the travel agency's role, in the case of travel abroad, is apparent in both individual and organized travel. However, this importance is considerable when one considers the question of the travel budget. Some 92% of respondents believe that payment facilities are also behind the transition to an agency. Moreover, 87% of the respondents buy their trips at the same agency.

The destinations chosen for the holidays of the respondents are almost identical. European destinations seem to be the most popular, including France, Spain and Italy, as is shown in Fig. 2. Indeed, all respondents said they have made at least one trip to France, especially to Paris (83% of respondents) motivated by the visits of relatives or friend expatriates who facilitate much of the trip. This rate drops to 65% in the case of Spain. In this case, Moroccan tourists seem more attracted by seaside tourism destinations such as the Costa del Sol and the Costa Brava, than by urban tourism in the Andalusia cities (Seville, Cordoba and Granada) or in Barcelona. These common destinations seem to attract all tourists, families or couples with a basic package (plane with or without hotel) with the presence of friends or relatives to provide accommodation in most cases. The same case applies to Italy, with 36% of the respondents saying they visited, especially Venice, Bergamo, Milan and Rome. Here too, the existence of expatriate relatives or friends plays an important role in the choice of destinations.

In general, the destinations listed above are chosen with generally a basic flight only or flight with hotel packages and very rarely in organized trips. For the latter, the option attracts a minority of young singles, while the rest opts for a trip with family or friends by car during the summer. The proximity of

Spain, a 40-minute ferry trip, facilitates the process of visiting this European destination by Moroccan outbound tourists.

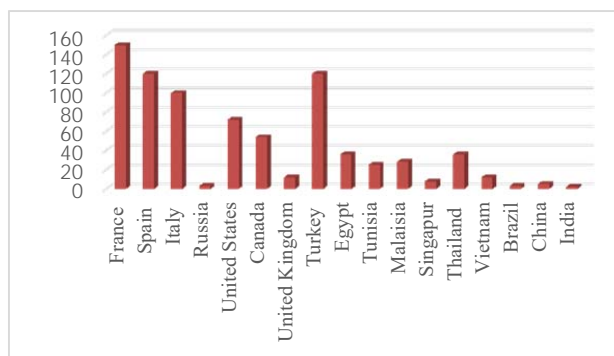


Fig. 2 Most visited destinations by Moroccan travelers

The existence of Moroccan expatriate relatives and friends seems to play a great role for the choice of other destinations like the United States and Canada. The behavior of the tourists surveyed seems to be the same in terms of the choice of cities; Montreal and New York are the most cited in terms of buying behavior. Accommodation with hosts is favored by tourists responded to this question against a small part that chose hotels.

The need to use the services of a travel agency in the organization of packages is very low. The general trend is to analyze the results of this survey for a direct debit card purchase of separate services, hotel and accommodation, especially for the European and US destinations. Visits and transfers are in high demand according to the results. However, the need for more turnkey packages matters when it comes to more exotic destinations. All respondents say they bought a package with a group for destinations like Turkey and Egypt, which are the most popular destinations for the respondents. In fact, out of 150 people, 120 people visited Turkey at least once and 80 people twice or more. When it comes to Egypt, 24% of the respondents have already visited the country of the pyramids and all the respondents consider visiting it in the coming years if the political situation stabilizes.

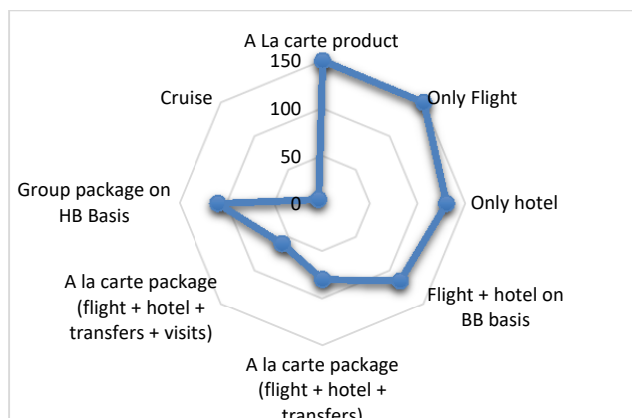


Fig. 3 Services purchased in travel agencies by Moroccan travelers

Tunisia is also among the tourist destinations visited by 16% of our respondents. Although they consider that it is interesting for them both at the level of services and especially lower rates compared to a stay in Morocco, its resemblance with Morocco in terms of supply and the political situation after the Arab Spring makes it a destination less demanded by Moroccans.

Far-off destinations are the least visited by our respondents. The top of the list comes to Thailand with 24% of our respondents followed by Malaysia with 18%. Sited for their exotism, these destinations attract Moroccans especially for visa facilities and the quality of service as much as other countries like China with 3.3%, India with 1.3% and Brazil, Vietnam and China with a weak demand. It should be noted that destinations such as Russia and Brazil are mainly based on the importance of the offer during periods of major events like the World Cup and Olympic Games. For these far-off destination packages, transport, accommodation and visits are the most requested.

The interviewees also pointed out that far-off destinations are more visited by mature couples with a high salary, while European destinations are visited by both married respondents and single people. The cost of travel appears to be a very important variable for all respondents. Expensive far-distance fares limit the demand of families who prefer nearby destinations such as southern Spain or those where relatives or friends reside.

VII. CONCLUSION

The outgoing sector in Morocco is still in its infancy. The economic and socio-cultural conditions of the population limit traveling abroad, which remains a privilege. These same conditions make traveling abroad dominated by Western destinations (Europe and North America). The importance of the links with these countries, cultural, historical and social, as well as the presence of strong Moroccan diasporas in certain destinations, makes them the first selected destinations by Moroccans. Spain is a special case because its proximity to Morocco makes it an alternative as a summer destination, for many Moroccans, compared to the seaside packages of Moroccan cities. However, it is not very present in the offer of Moroccan agencies.

According to the study, Turkey is also a popular destination for Moroccans, especially because of the lack of a visa. This variable is as important as the price in the choice of destinations in Asia which offer considerable facilities.

This qualitative study is contextual and its results concern the Moroccan case. Although it is a pioneer in the analysis of outgoing supply and demand, it has certain limitations that make it impossible to generalize the study. Several research orientations are still open and could help to deepen reflection on the subject, particularly on motivations, behavior and the constraints to the development of this niche by travel agencies.

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