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The Pillars of the Tourism Industry in Algeria
A Comparative Study
between Algeria and Morocco

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بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ

إلى أغلى ما أملك في هذه الحياة...

إلى من حملتني وهنا على وهن، إلى من سهرت الليالي لأنام،
إلى رمز الحنان والعطاء والتضحية،
إلى أمي الغالية حفظها الله ورعاها.

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إلى كل من أنار لي درباً، وعلمني حرفاً،
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إليكم جميعاً أهدي ثمرة هذا الجهد المتواضع.

شكر وتقدير

« مَنْ لَا يَشْكُرُ النَّاسَ لَا يَشْكُرُ اللَّهَ »

حديث شريف رواه الترمذي وأبو داود

الحمد لله الذي وفقني لإتمام هذا العمل، والصلاة والسلام على سيدنا محمد خاتم الأنبياء والمرسلين،
أما بعد:

يسعدني أن أتقدم بخالص الشكر وعظيم الامتنان إلى الأستاذة المشرفة الدكتورة فاطمة الزهراء العوفي، على ما أمدّتي به من توجيهات قيّمة، وصبر جميل، وحسن إشراف دقيق، طوال مراحل إعداد هذا البحث ومتابعته. فلها مني كل التقدير والاحترام، جزاها الله عني خير الجزاء.

كما أتوجّه بالشكر الجزيل إلى السادة أعضاء لجنة المناقشة على تفضّلهم بقبول تقييم هذا العمل وإثرائه بملاحظاتهم العلمية البناءة.

ولا يسعني إلا أن أشكر جميع أساتذة المدرسة العليا لإدارة الأعمال بتلمسان الذين أسهموا في تكويني العلمي والمعرفي طوال مسيرتي الدراسية، وكان لهم الفضل الكبير في بناء شخصيتي الأكاديمية وصقل مهاراتي البحثية.

وأخصّ بالشكر الجزيل عائلتي الكريمة، أبي وأمي وإخوتي الأعزاء، على دعمهم اللامحدود وصبرهم الطويل ووقوفهم إلى جانبي في كل لحظات المشقة والعطاء.

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وفي الختام، أسأل الله العليّ القدير أن يجعل هذا العمل خالصاً لوجهه الكريم، وأن ينفع به طلاب العلم والباحثين في مجال السياحة والتسيير.

وجزاكم الله خيراً جميعاً

Abstract

This thesis examines the fundamental pillars of the tourism industry in Algeria and their role in shaping the country's tourism competitiveness. Despite a rich natural and cultural resource base, Algeria's tourism sector remains significantly underdeveloped relative to comparable regional destinations. Using a descriptive-analytical methodology and employing Morocco as a regional benchmark, the thesis evaluates five operational pillars: travel agencies, accommodation, recreation and heritage, catering, and transport. The findings confirm that structural and institutional weaknesses prevent Algeria from converting its resource endowment into competitive tourism performance. Policy recommendations address Open Skies, Tourism Satellite Account implementation, a dedicated investment fund, and long-term strategic commitment.

Keywords: tourism industry · operational pillars · destination competitiveness · Algeria · Morocco

Résumé

Cette thèse examine les piliers fondamentaux de l'industrie touristique en Algérie et leur rôle dans la compétitivité touristique du pays. Malgré un riche patrimoine naturel et culturel, le secteur touristique algérien demeure nettement sous-développé par rapport à des destinations régionales comparables. En adoptant une méthodologie descriptivo-analytique et en prenant le Maroc comme référence comparative, la thèse évalue cinq piliers opérationnels : agences de voyages, hébergement, loisirs et patrimoine, restauration, et transport. Les résultats confirment que des faiblesses structurelles et institutionnelles empêchent l'Algérie de convertir ses ressources en performance touristique compétitive. Des recommandations portent sur l'Open Sky, la mise en place d'un Compte Satellite du Tourisme, un fonds d'investissement dédié, et un engagement stratégique à long terme.

Mots-clés : industrie touristique · piliers opérationnels · compétitivité des destinations · Algérie · Maroc

List of Abbreviations

API	Application Programming Interface	ONAT	Office National Algérien du Tourisme
CAPA	Centre for Aviation	ONMT	Office National Marocain du Tourisme
CLIA	Cruise Lines International Association	ONDA	Office National Des Aéroports (Morocco)
COVID-19	Coronavirus Disease 2019	ONS	Office National des Statistiques (Algeria)
DABA	DABA Finance (Moroccan financial data provider)	ONT	Office National du Tourisme (Algeria)
EU	European Union	OTA	Online Travel Agency
FDI	Foreign Direct Investment	RevPAR	Revenue Per Available Room
FMDT	Fonds Marocain de Développement Touristique	SDAT	Schéma Directeur d'Aménagement Touristique
GDP	Gross Domestic Product	TSA	Tourism Satellite Account
GDS	Global Distribution System	TTCI	Travel & Tourism Competitiveness Index
HCP	Haut-Commissariat au Plan (Morocco)	TTDI	Travel & Tourism Development Index
ICT	Information and Communication Technology	UNEP	United Nations Environment Programme
IMF	International Monetary Fund	UNESCO	UN Educational, Scientific and Cultural Organization
IRTS	International Recommendations for Tourism Statistics	UNWTO	United Nations World Tourism Organization
LCC	Low-Cost Carrier	VFR	Visiting Friends and Relatives
ODI	Overseas Development Institute	WEF	World Economic Forum
OECD	Organisation for Economic Co-operation and Development	WTTC	World Travel & Tourism Council

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General Introduction

Context and Significance

Tourism has evolved from a peripheral leisure activity into one of the most strategically important industries in the contemporary global economy. For many countries, it is now a primary source of national income, foreign exchange, and jobs and has also become a vehicle for cultural exchange and intercultural dialogue. Its growing importance has attracted sustained attention from researchers, industry practitioners, and policymakers alike, all seeking to understand the structural mechanisms that underpin its development and to identify the conditions under which it can contribute durably to economic diversification and sustainable development.

Tourism operates as a complex and interdependent system in which no single factor determines a destination's success. The availability of natural or cultural attractions, though necessary, is not in itself sufficient to generate competitive tourism performance. Alongside the resource base, a destination must possess adequate infrastructure, quality services, effective governance, and coherent marketing strategies. These components together constitute what the academic literature calls the *pillars* of the tourism industry — the functional elements upon which a country's tourism development is founded and through which its potential is either realised or left underutilised. Any structural weakness within one or more of these pillars can negatively constrain the overall performance of the sector, regardless of the underlying resource endowment.

In the Algerian context, tourism is a sector of substantial yet largely unrealised potential. Algeria is endowed with a diverse and remarkable range of tourism resources: a long Mediterranean coastline, vast Saharan landscapes, high mountain ranges, thermal springs, and a rich civilisational heritage spanning multiple millen-

nia. This heritage reflects successive historical layers — from pre-Islamic and Arab-Islamic periods through Ottoman rule and the colonial era — that have produced a wealth of archaeological sites, historic urban quarters, traditional architecture, and a living culture of diverse regional traditions, gastronomy, music, and intangible heritage. Such diversity positions Algeria as a potential destination for multiple forms of tourism, including cultural tourism, desert tourism, thermal tourism, ecotourism, and coastal tourism, offering a range of competitive assets that few North African countries can match for sheer variety.

Despite this considerable potential, the Algerian tourism industry remains relatively underdeveloped when compared to other countries with similar natural and cultural endowments — most notably its immediate neighbours. Tunisia recorded approximately 11 million tourist arrivals in 2025,¹ while Morocco generated tourism revenues of approximately US\$13.5 billion from 19.8 million visitors in the first eleven months of the same period.² Algeria, by contrast, was still working towards surpassing the 4 million arrival threshold.³ These comparative figures reflect a structural gap between Algeria's tourism potential and its actual performance, evident in tourism arrivals, infrastructure capacity, and international visibility, and raise important questions regarding the organisation of the tourism industry and the effectiveness of its fundamental pillars.

Research Problem

This context leads to the following central research question:

To what extent do Algeria's tourism assets contribute to the development of a competitive tourism industry?

¹Agence de Presse Africaine (APANEWS). (2025). *Tunisia records 11 million tourist arrivals*. APANEWS.

²DABA Finance. (2026). *Morocco: tourism revenues reach \$13.5 billion in 11 months of 2025*. DABA Finance, January 2026.

³African News Agency. (2025). *Algeria aims to exceed 4 million tourist arrivals*. African News Agency.

Sub-Questions

To address this central question in a systematic manner, the following subsidiary questions are posed:

1. Do Algeria's natural and cultural tourism resources represent a sufficient foundation for building a competitive tourism industry?
2. To what extent do the operational pillars of Algeria's tourism industry effectively transform available assets into a viable tourism product?
3. To what extent does the existing tourism infrastructure support the exploitation of Algeria's tourism assets?
4. What are the main obstacles preventing Algeria's tourism assets from generating a truly competitive tourism industry?

Hypotheses

The following hypotheses are advanced in response to the research problem:

H₁. Alternative Hypothesis: Despite the richness of Algeria's tourism assets, structural and institutional weaknesses across the tourism industry continue to limit the sector's ability to compete at both regional and international levels. This central alternative hypothesis is supported by the following contextual sub-hypotheses:

H_{1a}. Algeria possesses significant and diverse natural and cultural tourism assets; however, their contribution to industry competitiveness remains limited due to insufficient valorisation and underdeveloped infrastructure.

H_{1b}. The operational pillars of Algeria's tourism industry — particularly accommodation, transport, and travel agencies — have not yet reached the level of development necessary to effectively convert the country's tourism potential into a competitive product.

H_{1c}. The absence of a coherent and sustained national tourism policy has been a primary obstacle preventing Algeria's tourism assets from being systematically developed and positioned within regional and international markets.

H₀. Null Hypothesis: Algeria's structural and institutional weaknesses do not significantly limit the tourism sector's ability to compete at regional and international levels; the gap between resource endowment and competitive performance can be explained by factors other than institutional and operational deficiencies.

Importance of the Study

This study matters for several reasons. It contributes to revealing the gap between Algeria's actual tourism potential and the level of development currently achieved within its tourism industry. It identifies the strengths and weaknesses of the principal pillars of that industry, thereby producing a structured diagnostic that can inform both academic debate and practical policy. More broadly, it contributes to the growing body of scholarly research on tourism development in Algeria — a field that remains underrepresented in the academic literature relative to its economic and strategic importance. The study also aims to provide useful analytical insights for decision-makers, planners, and tourism professionals operating within the sector.

Objectives of the Study

The primary objective of this study is to identify and analyse the main pillars of the Algerian tourism industry. The study further seeks to evaluate the current state of each pillar and to assess its role in relation to Algeria's stated objectives for tourism development. In doing so, it aims to produce an evidence-based account of why so persistent a gap exists between the country's tourism endowment and its competitive

position, and to clarify the structural and institutional conditions that would need to change for that gap to be meaningfully reduced.

Reasons for Choosing the Topic

Objective Reasons

The clear disparity between Algeria's abundant and diversified tourism assets and the modest level of competitiveness its tourism industry has achieved raises legitimate and pressing analytical questions about the causes and conditions of this gap. The growing academic and institutional recognition that the systematic development of tourism industry pillars — accommodation, transport, agencies, and ancillary services — is a prerequisite for transforming raw tourism potential into measurable economic performance further justifies a focused study of these pillars in the Algerian context.

Personal Reasons

The topic is directly related to the researcher's academic specialisation in tourism establishments management. It also reflects a sustained personal interest in the organisation and development of tourism industries, particularly in contexts where resource endowment and economic performance diverge so sharply.

Difficulties of the Study

The principal difficulties encountered during this study were the limited availability of recent and reliable statistical sources pertaining to the Algerian tourism sector, and the restricted access to comprehensive data concerning the Moroccan tourism industry used for comparative reference.

Limitations of the Study

Spatial Limits

This study focuses primarily on the tourism industry in Algeria, with comparative reference to Morocco as a regional benchmark.

Temporal Limits

The study covers the period from **2010 to 2023**, a timeframe chosen to capture the most important developments in Algeria's tourism sector following the adoption of national tourism development strategies, while ensuring the relevance and recency of the statistical data relied upon.

Research Methodology

This study adopts a descriptive-analytical methodology based on the analysis of existing secondary data, official documents, and academic literature. A comparative approach is also employed to situate Algeria's tourism industry performance within a regional context, primarily through reference to Morocco's experience as a neighbouring country that has achieved notably stronger results from a comparable resource base.

Literature Review

International Studies

Holzner (2011) — Tourism and Economic Development: The Beach Disease?

Holzner investigated whether heavy tourism specialisation generates the kind of structural economic distortions associated with natural resource dependence — a

phenomenon he termed the “beach disease” by analogy with the Dutch disease. Drawing on panel data across a broad cross-section of developing and middle-income countries, the study found that while tourism receipts reliably boost per-capita income, countries that fail to diversify their tourism base or that rely on enclave models face risks of competitiveness erosion in other tradable sectors. For this thesis, the finding carries direct relevance: Algeria, as a hydrocarbon-dependent economy seeking to develop tourism as a diversification lever, must structure that development around integrated, locally-embedded operational pillars rather than externally-controlled resort enclaves — precisely the distinction that Chapter Three’s comparative analysis examines.

Assaf and Josiassen (2012) — Identifying and Ranking the Determinants of Tourism Performance: A Global Investigation.

Assaf and Josiassen conducted a comprehensive cross-country investigation of the factors that most strongly drive differences in national tourism performance, using Bayesian model averaging to rank determinants by their explanatory power. Their results placed institutional quality, transport infrastructure, and the effectiveness of destination marketing consistently above natural endowment as predictors of tourism receipts per arrival. Countries with comparable resource bases but stronger institutional frameworks systematically generated more revenue per visitor and attracted more high-spending market segments. This finding validates the analytical design of this thesis: it explains why Algeria and Morocco — with broadly similar geographical and heritage assets — produce such different tourism outcomes, and it identifies the institutional and operational pillars as the domain where policy intervention is most likely to yield results.

Crouch (2011) — Destination Competitiveness: An Analysis of Determinant Attributes.

Crouch empirically validated and refined the destination competitiveness framework through a large-scale survey of tourism experts, ranking and weighting the determinant attributes that most influence whether a destination succeeds in attracting and

retaining visitors. His analysis identified destination management, core resources, supporting factors, and destination policy as the four principal competitiveness domains, demonstrating that natural and cultural endowment — while necessary — is insufficient without the institutional and operational infrastructure to convert it into a market-ready product. This framework structures the comparative assessment of Algeria and Morocco in Chapter Three, providing an evidence-based lens for diagnosing why comparable resource endowments produce such divergent tourism outcomes.

Page and Connell (2020) — Tourism: A Modern Synthesis.

Page and Connell produced one of the most comprehensive contemporary overviews of the tourism industry, synthesising developments across demand analysis, supply-side management, destination planning, and digital transformation. Their work is particularly relevant to this thesis for its systematic treatment of the operational pillars of the tourism industry — accommodation, transport, tour operations, food service, and recreation — and for its attention to the structural challenges facing destinations in transitional tourism economies. The fifth edition reflects post-2015 market realities including the platform economy, sustainability imperatives, and the growing importance of experiential tourism segments.

Arabic Studies

Sharpley and Telfer (2015) — Tourism and Development: Concepts and Issues.

Sharpley and Telfer examined the complex and often contested relationship between tourism and development, challenging simplistic assumptions that tourism expansion automatically translates into broad-based economic and social progress. Drawing on cases from across the developing world, the authors demonstrated that tourism's developmental outcomes depend critically on governance quality, leakage rates, supply chain integration, and community participation. Their framework for evaluating tourism as a development instrument is directly applicable to Algeria's situation,

where the gap between tourism potential and actual economic contribution remains large and structurally explained.

Aallali (2017) — Tourism Development and Resources in Morocco.

Aallali examined how Morocco developed into one of North Africa's leading tourism destinations and identified the factors driving that growth. The research assessed the country's natural and cultural resources, its tourism infrastructure, and the policies underpinning them, producing an evaluation of both achievements and persistent weaknesses. It raised important questions about planning, resource management, and institutional capacity in the North African context.

Habibi, Rahim, Ramayah, and Mustamil (2018) — The Relationship Between Service Quality and Tourist Satisfaction in North Africa.

Habibi et al. investigated the determinants of tourist satisfaction across North African destinations, demonstrating through structural equation modelling that the quality of operational tourism services — accommodation, transport, food, and guidance — is the primary mediating variable between destination resource endowment and actual visitor satisfaction scores. Their central finding that resource-rich destinations systematically underperform on satisfaction metrics when operational service quality is weak directly validates the analytical framework of this thesis. The North African context makes this study particularly relevant: the structural service quality gaps identified by Habibi et al. map closely onto the pillar-level weaknesses documented in Algeria's comparative assessment in Chapter Three.

Al-Ababneh (2013) — Service Quality in the Hospitality Industry: Jordan.

Al-Ababneh argued that hospitality quality is not a peripheral concern but a primary determinant of destination success. The study evaluated hotel and accommodation service standards in Jordan, identifying where performance met visitor expectations and where it fell short, with the aim of demonstrating that sustained investment in service quality is a strategic necessity for any country seeking a competitive tourism sector.

Local Studies

Oulad El Haddar (2013) — The Tourism Industry in Ghardaïa Province.

This study examined how a structured tourism industry can activate and valorise a region's natural, cultural, and historical assets, using Ghardaïa Province as a case study. Despite the province's remarkable diversity of desert, architectural, and heritage resources, the study found that weak investment and limited institutional support had produced a persistent gap between existing potential and actual tourism performance. It explored how planning, investment, marketing, and human resource development collectively determine whether a destination's assets are effectively converted into a competitive product.

Meskin, Derwish, and Zarrou (2015) — The Tourism Industry in Algeria.

This study examined Algeria's tourism industry through a dual lens: mapping the natural, cultural, and historical assets that form the country's tourism base, and measuring the extent to which those assets translate into genuine competitiveness at the regional and international level. The authors argued that possessing rich tourism resources is not in itself sufficient to compete effectively, and that competitiveness depends on how well those resources are organised, marketed, and supported by functional industry pillars. The study identified a persistent gap between Algeria's tourism potential and its actual performance, attributing this gap primarily to structural weaknesses in infrastructure, investment, and institutional management.

Khadawi, Khalifa, and Khabazi (2022) — Elements of the Tourism Industry in Algeria.

This study examined the tourism industry in Algeria by focusing on its main components and structural elements, treating tourism as a complex and interconnected system combining services, transportation, accommodation, and tourism activities. Using a descriptive-analytical approach to evaluate the reality of the sector, the authors highlighted Algeria's rich natural, cultural, and geographical potential while

demonstrating that multiple challenges — particularly the need for effective strategies, better organisation, and stronger development policies — continued to impede the achievement of sustainable tourism.

Tarfaya (2022) — Ways to Promote the Tourism Sector in Algeria.

This doctoral thesis analysed the reality of Algeria’s tourism sector and identified the main challenges preventing its development as a strategic alternative to the hydrocarbon-dependent economy. Despite Algeria’s rich tourism potential and diverse attractions, the research found the sector to be underperforming relative to neighbouring countries, pointing to weak exploitation of tourism resources, structural inefficiencies, and insufficient alignment with global tourism trends. The thesis concluded by emphasising the need to modernise development strategies, improve infrastructure, and adapt to global industry changes to enhance competitiveness.

Added Value of the Thesis

The literature reviewed above, while valuable, leaves several important gaps that this thesis directly addresses. Most existing studies on Algerian tourism focus on isolated dimensions — natural resource endowment, policy analysis, or a single pillar such as accommodation or transport — without integrating these elements into a unified analytical framework. Comparative studies that position Algeria alongside a regional benchmark on an equal analytical footing are rarer still. This thesis fills that gap in three specific ways.

First, it applies a **five-pillar operational framework** — travel agencies, accommodation, recreation and heritage, catering, and transport — systematically and simultaneously to both Algeria and Morocco. This allows the source of the competitive gap to be located precisely, rather than attributed diffusely to general policy failure or resource underutilisation.

Second, the thesis uses **internationally comparable statistical data** — World Bank, WTTC, WEF, and OECD series covering 2010–2023 — to conduct a

quantified comparison that most prior Algerian tourism studies have avoided, either because the data were unavailable or because methodologies remained qualitative. Where official Algerian data are absent (notably TSA-based GDP contribution and disaggregated occupancy rates), the thesis explicitly documents that absence as itself a structural finding.

Third, the thesis contributes a **structured diagnostic** that bridges academic analysis and operational policy. Rather than stopping at the identification of weaknesses, it translates the comparative findings into concrete, pillar-by-pillar recommendations calibrated to Algeria's institutional and budgetary context — including on sustainable tourism — that can serve as a usable reference for policymakers and industry stakeholders.

Structure of the Thesis

As part of answering the research question and its subsidiary parts, this thesis will be structured as follows, consisting of three chapters before and after the present introduction and conclusion.

Chapter One presents the theoretical background of the tourism industry. The notion of tourism is examined within a historical, definitional and systemic context; the basic characteristics and relevance of tourism as a socio-economic phenomenon; and the structure, aims and driving forces of the tourism industry. The fundamental resources and pillars (natural, cultural-human and infrastructural) that determine tourism development as well as the principle of sustainability are also defined.

Chapter Two discusses the operational side of the tourism industry. The principal operational pillars are introduced and defined, and five of those are further explained, namely the operations of tours organization and travel agencies; hotel management and tourist accommodation; recreation management and tourism services; food and catering services; and tourism transport system. The chapter ends with a brief description of the structural and managerial aspects of the operation

pillars of the tourism industry.

Chapter Three represents the empirical core of this thesis. Using the theoretical framework described above, it contains a comparative analysis of tourism sectors of Algeria and Morocco in the period of 2010-2023 based on internationally comparable statistical data and latest research. An in-depth assessment of each of the five operational pillars in the two countries is conducted, along with analysis of other tourism performance indicators. In addition, testing of the research hypotheses stated earlier in this paper will be carried out. Recommendations regarding the future development of the Algerian tourism industry are formulated.

The three chapters follow a coherent progression: from theoretical foundations through operational analysis to empirical application, building the evidence base for the conclusions and recommendations that follow.

CHAPTER 1

Theoretical Foundations of the Tourism Industry

Introduction

The scale of modern tourism is difficult to overstate. By 2019, international tourist arrivals had reached 1.5 billion and tourism receipts exceeded USD 1.5 trillion, representing one of the largest voluntary transfers of economic value across national borders in history.¹ Yet aggregate figures of this kind, however impressive, conceal more than they reveal. They say nothing about the structural mechanisms through which demand is converted into economic value, the institutional architecture that makes tourist flows possible, or the conditions under which tourism generates durable development rather than enclave growth. To engage with these questions—which are the questions this thesis asks of Algeria—requires a theoretical framework that goes beyond counting arrivals and receipts. This chapter constructs that framework.

The expectations placed on tourism by governments and development agencies have expanded considerably beyond simple visitor-counting. National tourism strategies now routinely assign the sector goals spanning economic diversification, regional development, heritage conservation, employment generation, and environmental sustainability—sometimes simultaneously and without clear prioritisation.² Whether these expectations are realistic in a given context depends entirely on whether the industry’s structural foundations are adequate to support them. An analytically rigorous assessment of tourism therefore requires treating it not as a

¹United Nations World Tourism Organization. (2023). *Tourism Highlights, 2023 Edition*. Madrid: UNWTO.

²UNWTO & UNEP. (2005). *Making Tourism More Sustainable: A Guide for Policy Makers*. Madrid: UNWTO, pp. 1–5.

monolithic activity but as a system of flows—of people, money, information, and expectations—mediated by an institutional architecture whose quality determines the gap between potential and performance.

This chapter aims to supply such conceptualisation, which, according to this thesis, is an indispensable pre-condition for any further consideration of the subject matter. To this end, the notions of tourism and tourist are first examined. Attention is paid to their historical origin, definition and some basic institutional aspects. Then, the main characteristics and levels of tourism as a socio-economic phenomenon are discussed. After that, the chapter focuses on the tourism industry, considering its notion, aims, structure and development trends as well as success factors and driving forces. Finally, it addresses the resources on which tourism development is dependent—natural, cultural and human resources, and infrastructure and economic systems. Sustainability is a key cross-cutting aspect considered throughout the chapter.

1.1 Concept of Tourism

The concept of tourism is deceptively straightforward in everyday usage but analytically complex once examined carefully. It encompasses not only the physical movement of people between places but also the experiences, transactions, and relationships generated by that movement—between tourists and hosts, between tourists and the physical environment, and between the many institutional actors whose coordinated activity makes tourism possible. Precision about what tourism is, who the tourist is, and what the tourism industry consists of is therefore not a semantic exercise: it determines who and what is counted in statistical measurement, which activities fall under tourism policy, and which enterprises belong to the industry being analysed in this thesis.

1.1.1 Origin and Definition of Tourism and the Tourist

1.1.1.1 Historical Origin of Tourism

The word “tourism” entered European languages only in the early nineteenth century, but the social practices it describes—voluntary, non-instrumental displacement motivated by curiosity, health, devotion, or pleasure—are far older. What changed over time was not the impulse to travel but the institutional conditions that made travel possible at scale: the development of roads, transport technologies, accommodation networks, and ultimately an entire industry dedicated to organising and facilitating movement. Understanding this history matters for the thesis because it reveals that tourism is not a natural outgrowth of attractive geography. It is always and everywhere the product of deliberate investment in the infrastructure and institutions that convert latent demand into actual flows—a lesson with direct implications for Algeria’s current situation.

Ancient Forms of Leisure Travelling Despite the fact that travel in antiquity was complicated, costly and risky, the desire to leave one’s home to relax or study in a different place has existed. Some precursors of tourism can be found in the history of this period. The residents of Ancient Greece traveled to large-scale religious events and athletic competitions such as the Olympic Games or to places with famous oracles such as Delphi, merging ritual elements, entertainment and temporary relocation.¹ The Roman nobility was spending their leisure (known as *otia*) visiting seaside towns and spa resorts in order to spend some time in better climate conditions.

Elite Travel and the Grand Tour One of the defining characteristics of the early modern period is the codification of educational and culture-seeking travel in

¹Cooper, C., Fletcher, J., Fyall, A., Gilbert, D., & Wanhill, S. (2008). *Tourism: Principles and Practice* (4th ed.). Harlow: Pearson Education, pp. 3–7; see also Graburn, N. H. H. (1989). Tourism: the sacred journey. In V. L. Smith (Ed.), *Hosts and Guests: The Anthropology of Tourism* (2nd ed., pp. 21–36). Philadelphia: University of Pennsylvania Press.

its elite manifestation: the Grand Tour. Emerging in the sixteenth and seventeenth centuries and becoming widespread during the eighteenth century, the Grand Tour was undertaken exclusively by aristocratic men who had completed their formal education and were entering adulthood but still retained considerable youth.¹ Involving travel across several months or even several years, the typical route passed through France, the Low Countries, Switzerland, and finally Italy, with frequent additions such as visits to Greece.² The primary aims of the Grand Tour were the study of classical ruins and art, architecture, language, and political institutions.

What makes the Grand Tour particularly noteworthy as regards its historical significance is the institutionalisation of certain features that would recur in tourism in later decades: namely, the voluntary nature of the trip, its prestige, prior planning, involvement of specialised guides and/or *ciceroni*, and the orientation of the trip to both cultural learning and social distinction.³ Participants would purchase artworks and books, write letters to family members at home recounting their impressions of destinations visited, and help disseminate destination images and travel practices. Although restricted to very select groups in terms of class and gender, the Grand Tour helped establish the norm of travel abroad as an important part of the life cycle.

Industrialisation, Transport Breakthroughs, and Organised Excursions

Industrialisation brought fundamental transformations to the landscape of travel, including on the question of means. Beginning with the late eighteenth century, the emergence of new technologies of steam navigation and especially railways decreased the cost and increased the speed and safety of long-distance travel.⁴ In parallel with industrialisation, new social classes emerged, urbanisation progressed, and a clear separation developed between work and leisure spheres. Progressively restrictive

¹Goldsmith, S. (2020). *Masculinity and Danger on the Eighteenth-Century Grand Tour*. Manchester University Press. See also Page, S., & Connell, J. (2020). *Tourism: A Modern Synthesis*. Cengage.

²Page, S., & Connell, J. (2020). *Tourism: A Modern Synthesis*. London: Cengage, pp. 9–12.

³Page, S., & Connell, J. (2020). *Tourism: A Modern Synthesis*. London: Cengage, pp. 9–12.

⁴Europeana. (2020). Travelling for pleasure: a brief history of tourism. <https://www.europeana.eu/en/stories/travelling-for-pleasure-a-brief-history-of-tourism>.

labour laws in certain countries limited work hours and even introduced the concept of paid holiday leave, providing an institutional foundation for leisure travel beyond purely elite circles.

Within this framework, the earliest forms of organised excursions and *package trips* emerged. In Britain, Thomas Cook arranged the first such excursion in 1841, organising a day trip by train from Leicester to Loughborough involving members of a temperance society, which included not only transport but also refreshments in a single ticket.¹ Based on this model, Cook and other entrepreneurs progressively developed increasingly complex travel routes to domestic destinations and later continental Europe, negotiating special fares with railway companies and incorporating them into an inclusive bundle of transport and accommodations.² These developments heralded an industrial mode of travel organisation and laid the ground for the rise of mass tourism.

From Elite and Niche Tourism to Mass Tourism The second half of the nineteenth and the first decades of the twentieth century were marked by a gradual extension of travel possibilities to non-traditionally elite layers of the population. Increased development of railway networks, steam navigation, and motor coach systems made possible visits by middle-class tourists to seaside resorts, spa towns, and mountain resorts.³ City inhabitants sought relaxation from the bustle and pollution of cities in the fresh air of seaside and rural destinations; health tourism to resorts and sanatoriums combined motivations of recreation and health recovery. Some organised schemes of social and company tourism emerged in a few countries.

Mass tourism per se, however, only took shape after World War II due to the combination of factors, including economic reconstruction, continued rise of real wages, extended statutory leave, and demographic shifts. Technological progress in aviation and liberalisation of air transport facilitated international travel and

¹Deutsche Welle. (2016). 175 years ago – the first package holiday. Retrieved from <https://www.dw.com>.

²Historic UK. (2023). *The History of Thomas Cook*.

³*Ibid.*

led to the emergence of charter flights and later budget airlines.¹ Tour operators exploited these developments by offering standardised *sun-and-sea* holiday packages for popular beach destinations, including charter flights, hotel stays, and transfer services.

The post-war period therefore witnessed a number of institutional innovations in tourism: vertical integration of tour operators, active utilisation of media technologies in destination marketing, construction of resort complexes for tourism, and incorporation of holidays as an ordinary household consumption good. Further developments in following decades added to the diversity of forms of tourism and destinations, emergence of independent and niche tourism sectors, and digitisation of the marketing process. However, the general historical development from pilgrimage to educational tours, organised excursions, and finally mass tourism amounts to a key reference framework for understanding the emergence and evolution of the tourism industry. Ultimately, the history shows clearly that tourism has never emerged spontaneously. It has always depended on certain institutions, infrastructure, and conscious investments, a lesson that applies as much now as it did in Thomas Cook's time.

1.1.1.2 Defining Tourism and the Tourist

Parallel to the above changes, academia and international institutions have worked hard to develop adequate conceptual definitions of tourism and the tourist, which would be both theoretically sound and practically useful for statistical analysis. Among the most widely accepted definitions is that of the United Nations World Tourism Organization (UNWTO). In the context of its efforts in tourism statistics standardisation, UNWTO defines tourism as “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business, and other purposes not related to the exercise of an

¹Richardson, D. (2023). The package holiday revolution. *BBC History Extra*.

activity remunerated from within the place visited.”¹

The operational utility of the UNWTO definition lies in the hierarchical typology it underpins. The IRTS 2008 framework distinguishes the broader category of *travellers* from the narrower sub-category of *visitors*: visitors are travellers who move to a principal destination outside their usual environment for a duration of less than one year, with any purpose other than paid employment at that destination.² Visitors are further divided according to whether they stay overnight at the destination (tourists) or do not (same-day visitors, often called excursionists). This seemingly simple binary carries substantial practical consequences: overnight tourists generate demand for accommodation, sustain local hospitality businesses, and contribute more substantially to destination economies than same-day visitors who may consume only food and entrance fees.³ For statistical bodies and national ministries of tourism, maintaining these boundaries consistently is indispensable for computing comparable tourism receipts, occupancy rates, and economic impact figures—data that ultimately inform investment decisions and policy design.

An alternative conceptual definition is offered by Hunziker and Krapf, according to whom tourism is the total of phenomena and relations emerging due to travel and stay of non-residents, provided that they do not lead to permanent settlement or are not related to earning.⁴ As is obvious from the definition above, the process of tourism implies a multitude of relations rather than simply physical displacement, and implicitly acknowledges the mediating role played by the tourism industry in establishing them. As diverse as they are, both definitions highlight the relational aspect of tourism, implying that it needs an organisation and structure to function.

¹United Nations World Tourism Organization. (2008). *International Recommendations for Tourism Statistics 2008*. United Nations.

²UNWTO. (2008). *International Recommendations for Tourism Statistics 2008* (IRTS 2008), p. 10.

³UNWTO & UNEP. (2005). *Making Tourism More Sustainable: A Guide for Policy Makers*. Madrid: UNWTO, p. 8.

⁴Hunziker, W., & Krapf, K. (1942). *Grundriss der Allgemeinen Fremdenverkehrslehre*. Polygraphischer Verlag Zürich, cited in Leiper, N. (1979). The framework of tourism: towards a definition of tourism, tourist and the tourist industry. *Annals of Tourism Research*, 6(4), 390–407.

1.1.1.3 The Systems Approach and the Tourist

Among the numerous theoretical approaches linking tourism to the tourism industry, perhaps the most notable is the systems model suggested by Neil Leiper. According to Leiper, the tourism system represents an open system whose elements include the human element (tourists), three geographical elements (the tourist generating region, the transit route region, and the tourist destination region), an industrial element (the tourism industry), and the surrounding physical, social, cultural, economic and political environment.¹ According to the model proposed by Leiper, the tourist is described as a person engaged in a discretionary and temporary tour involving at least one overnight stay at destination other than the usual place of residence, except for those tourists who go there mainly to earn money during the tour.²

Three elements of Leiper's tourist definition are worth unpacking for this research. First, the criterion of *discretion* distinguishes tourism from forced mobility such as refugee movement or labour migration; it underscores the voluntary and hedonic motivation that makes tourism demand uniquely elastic and sensitive to confidence, perception, and marketing. Second, the *temporariness* criterion anchors tourists in a generating region to which they intend to return, which is precisely why that region is the locus of most promotional activity by destination managers and tour operators alike. Third, the exclusion of persons *remunerated from within the destination* marks the boundary between tourists and migrants or long-term workers—a boundary with direct implications for measuring tourism's economic footprint.³

Beyond the tourist definition itself, the systemic architecture of Leiper's model—three geographic zones connected by tourist flows, an overarching industrial element, and a multi-dimensional environment—offers an integrative lens that neither purely demand-side nor purely supply-side definitions provide. Demand-side frameworks (such as the UNWTO statistical approach) excel at measuring aggregate expenditure

¹Leiper, N. (1979). The framework of tourism: towards a definition of tourism, tourist and the tourist industry. *Annals of Tourism Research*, 6(4), 390–407.

²Leiper, N. (1979). *The framework of tourism*, p. 394.

³Leiper, N. (1979). *The framework of tourism*, pp. 394–396.

but say little about where and how services are assembled; supply-side definitions enumerate firms but miss the spatial logic of tourism. By mapping both dimensions onto a single open system, Leiper's model makes it possible to trace how upstream decisions in the generating region—marketing campaigns, visa liberalisation, airline capacity—propagate downstream into destination performance. This integrative capacity explains why the framework is adopted as the organising principle of the present analysis of Algeria's tourism pillars.

1.1.2 Characteristics and Importance of Tourism

1.1.2.1 Service and Experience Characteristics

Tourism's service characteristics are not merely definitional formalities; they translate into concrete strategic imperatives for firms and destinations alike. At the most fundamental level, tourism is an *experiential* industry: what tourists purchase is not a tangible good they can inspect before buying but a configuration of memories, emotions, and encounters assembled in real time at the destination. Smith's influential five-component model articulates this well, decomposing the tourism product into the physical plant (facilities and environment), service delivery, hospitality, the tourist's freedom of choice, and personal involvement.¹ The value of this framework for the present research lies in what it implies about the *industry*: because the final product is co-created by both provider and tourist, no single firm controls quality end-to-end. Competitive advantage depends on the *system* of providers as a whole—a point directly relevant to assessing Algeria's operational pillars.

Intangibility is the first and most consequential of tourism's distinctive traits. Unlike a car or a smartphone, the core experience cannot be evaluated before purchase; tourists must rely on photographs, reviews, branding, and word-of-mouth to form prior expectations.² This elevates the strategic importance of destination im-

¹Smith, S. L. J. (1994). The tourism product. *Annals of Tourism Research*, 21(3), 582–595, p. 588.

²Page, S., & Connell, J. (2020). *Tourism: a modern synthesis* (5th ed.). Andover: Cengage Learning.

age management, online reputation systems, and post-trip relationship marketing. *Inseparability* compounds this: production and consumption occur simultaneously and necessarily involve the tourist's physical presence, which means that every service encounter is, in effect, a live performance that cannot be quality-tested before it reaches the customer. The practical implication is that front-line staff training, service culture, and real-time quality monitoring matter more in tourism than in most goods-producing industries.

Heterogeneity follows logically from inseparability. Because service delivery involves human beings in variable contexts, consistent quality cannot be guaranteed the way it can on a factory production line. The same hotel room, guide, or restaurant meal will be experienced differently by different tourists, and even by the same tourist on different days. This variability is not merely a management nuisance; it is also a source of competitive value—the idiosyncratic local experience that a small Saharan guesthouse provides is precisely what a chain hotel cannot replicate. The strategic implication for tourism operators is the need to simultaneously manage minimum quality thresholds (to protect brand credibility) and preserve the authentic variability that makes destinations distinctive.¹

1.1.2.2 Perishability, Seasonality, and Intersectorality

Perishability gives tourism its most punishing revenue logic. A hotel room that goes unoccupied, an aircraft seat that flies empty, or a guided tour that departs with two passengers instead of twelve: the associated revenue is irretrievably lost, unlike manufactured goods that can be warehoused and sold later.² This structural feature has driven the entire architecture of yield management and dynamic pricing in hospitality and airlines, and it explains why tour operators commit to bulk capacity purchases well in advance—they accept the risk of under-sale in exchange for lower unit costs that make packages competitively priced. For a destination like Algeria, where occupancy rates and load factors tend to be structurally low outside narrow

¹Page, S., & Connell, J. (2020). *Tourism: A Modern Synthesis*. London: Cengage, p. 92.

²Cooper et al. (2008). *Tourism: Principles and Practice*, p. 49.

high-season windows, the implications are especially acute: infrastructure investments depreciate against a much smaller revenue base than the physical capacity would suggest.

Seasonality—the uneven temporal distribution of tourist arrivals—amplifies perishability’s pressures. Butler’s analysis of seasonality identifies natural factors (climate and daylight) and institutional factors (school holidays, cultural calendars) as the principal drivers of demand concentration.¹ The combination of these forces creates peak periods that strain infrastructure and staff while leaving the same assets severely underutilised for much of the year—a pattern that compounds financing difficulties, discourages private investment, and produces volatile employment. Strategies to manage seasonality—shoulder-season pricing, event tourism, domestic tourism promotion, and diversification toward year-round segments such as business and health tourism—thus represent an important dimension of any national tourism development plan.

Intersectorality is the third structural characteristic with direct relevance to this analysis. Tourism is not a self-contained industry in the conventional sectoral sense: it assembles inputs from transport, accommodation, food service, retail, culture, financial services, and telecommunications into a composite product.² This is precisely why the Tourism Satellite Account methodology was developed—to capture tourism’s economic contribution across sectors that standard industrial classifications fragment. For destination managers and policy makers, intersectorality implies that weaknesses in any one contributing sector—say, insufficient air connectivity or poor road infrastructure—can nullify competitive strengths elsewhere. This systemic vulnerability is central to the operational pillar framework developed in Chapter Two.

¹Butler, R. W. (1994). Seasonality in tourism: issues and problems. In A. V. Seaton (Ed.), *Tourism: The State of the Art*. Chichester: Wiley, pp. 332–339.

²UN, Eurostat, OECD, & UNWTO. (2010). *Tourism Satellite Account: Recommended Methodological Framework 2008*. United Nations, p. 3.

1.1.2.3 Multidimensionality of the Tourism Contribution

The relevance of the discussed features explains the multidimensionality of the tourism industry contribution. Firstly, in economic terms, tourism has become an important element of the world economy through tourism expenditures, investments, jobs created, GDP growth, fiscal revenues, etc. Tourism is viewed as a strategic sector for some countries and can be used for achieving the goals of regional development or poverty reduction, among others. The methodology of measuring tourism contributions in an internationally comparable way is the tourism satellite account approach, which is a part of the System of National Accounts framework.¹

The socio-cultural dimension of tourism contribution includes cultural exchanges of visitors with people of host regions and creation of mutual appreciation, which can foster cultural diversity and creativity in some cases. On top of that, tourism can promote cultural heritage protection and revitalization. Tourism takes place in the field where economic motives and socio-cultural factors interact and influence each other. Therefore, it needs to be managed properly to minimize possible social conflicts.

In ecological terms, tourism's relationship with natural and cultural resources is inherently paradoxical: the resources that attract tourists are simultaneously depleted by their presence. The concept of sustainable tourism addresses this paradox by requiring that development strategies protect the resource base on which future demand depends—a principle that UNWTO and UNEP formalised in their joint policy guide, which frames sustainability not as a constraint on growth but as a precondition for its long-term viability.² Concretely, this means that destination managers must actively monitor environmental carrying capacities, regulate visitor flows in ecologically sensitive areas, and channel a portion of tourism revenues back into conservation and community welfare. For Algeria—a country with exceptional

¹United Nations, European Commission, Organisation for Economic Co-operation and Development, & UNWTO. (2010). *Tourism Satellite Account: Recommended Methodological Framework 2008*. United Nations.

²UNWTO & UNEP. (2005). *Making Tourism More Sustainable: A Guide for Policy Makers*. Madrid: UNWTO, p. 11.

natural assets in the Sahara and Ahaggar highlands and fragile heritage sites at Timgad and Djémila—the sustainability dimension is not an abstract concern but an immediate operational priority.

Taken together, these economic, socio-cultural, and environmental dimensions confirm that tourism cannot be managed through a single sectoral ministry or regulatory lens. It requires coordinated governance across multiple domains—a challenge whose institutional complexity is reflected in the unevenness of tourism performance across comparable countries. This multi-dimensional framing provides the backdrop for the comparative analysis of Algeria and Morocco that constitutes the empirical core of the present study.

1.1.3 Levels of Tourism

1.1.3.1 Geographical and Statistical Levels and Aggregates

Tourism flows can be categorised along two intersecting axes—the residence of the traveller relative to the country of reference, and the direction of movement—yielding six standard analytical aggregates defined by IRTS 2008.¹ At the most granular level, the framework distinguishes *domestic tourism* (residents travelling within their own country), *inbound tourism* (non-residents visiting a country), and *outbound tourism* (residents travelling abroad). These three flows then combine into higher-order aggregates: *internal tourism* (domestic plus inbound), *national tourism* (domestic plus outbound), and *international tourism* (inbound plus outbound).

For policy purposes, these distinctions are far from semantic. Domestic tourism is relatively insulated from exchange-rate volatility and geopolitical disruptions that periodically suppress inbound flows; conversely, it is more sensitive to domestic income levels and internal infrastructure quality. Algeria's persistently low inbound numbers—discussed in the comparative chapter—make domestic demand a structurally important stabiliser of accommodation occupancy, one whose potential has historically been underdeveloped. Inbound tourism, by contrast, generates foreign

¹UNWTO. (2008). *IRTS 2008*, pp. 13–15.

exchange and exposes the local industry to international competitive benchmarks, providing both an economic benefit and a performance discipline that purely domestic markets do not impose. Understanding which aggregate is being targeted by a given policy or investment therefore has direct consequences for the design of promotional campaigns, infrastructure priorities, and regulatory frameworks.

1.1.3.2 Sociological Typologies of Tourists

Sociological approaches to tourist typology complement the statistical framework by illuminating the *motivational* and *behavioural* heterogeneity that aggregate arrival figures conceal. Cohen's influential fourfold classification—organised mass tourist, individual mass tourist, explorer, and drifter—positions tourists along two intersecting dimensions: the degree to which they seek novelty versus familiarity, and the extent to which they rely on institutionalised tourism arrangements.¹ At one pole, organised mass tourists travel within a hermetically controlled “environmental bubble,” delegating virtually all planning to operators and seeking the comfort of the familiar; at the other, drifters deliberately sever themselves from the tourism industry's infrastructure and seek full immersion in host communities.² Explorers and individual mass tourists occupy intermediate positions, balancing varying degrees of novelty-seeking against institutional support.

Cohen's typology retains its analytical value precisely because it reveals a fundamental segmentation challenge for the tourism industry: the same destination must simultaneously attract the mass-market segment that requires standardised, risk-reduced packages and the experiential segment that demands authenticity, flexibility, and depth of engagement. For Algeria, this tension is particularly pointed. The country's comparative strengths—Saharan landscapes, Roman antiquities, Berber cultural heritage—suggest a natural fit with explorer and experiential segments. Yet the institutional apparatus (packaged tours, accessible online booking, reliable

¹Cohen, E. (1972). Towards a sociology of international tourism. *Social Research*, 39(1), 164–182.

²Cohen, E. (1972). *Towards a sociology of international tourism*, p. 167.

transport links) needed to serve those segments efficiently remains underdeveloped. The typology thus helps frame one of the structural mismatches that the operational pillar analysis will examine.

1.1.3.3 Implications of Levels for the Tourism Industry

Beyond the geographical and sociological typologies discussed above, tourism is further segmented by purpose, destination type, and degree of institutional organisation—each dimension generating different demand structures and requiring different supply-side responses. Purpose-based segmentation (leisure, business, visiting friends and relatives, health, education, religious) is perhaps the most consequential for destination planning because each purpose segment differs systematically in spending behaviour, length of stay, accommodation preferences, and sensitivity to price and security conditions. Business tourism, for instance, generates demand for conference facilities, business hotels, and reliable connectivity regardless of natural or cultural attractions; its spatial distribution is determined by economic geography rather than scenic resources. This matters directly for Algeria: as a country positioning itself in the early stages of tourism development, the choice of which purpose segments to prioritise determines which infrastructure investments are most urgent.

Destination type (urban, coastal, mountain, desert, rural) intersects with purpose to define the competitive landscape within which any given destination operates. Algeria's portfolio spans all of these types, which is a genuine comparative asset, but it also means that the infrastructure and service requirements are heterogeneous and cannot be addressed through a single development template. Coastal tourism at Tipaza demands different investment from Saharan desert tourism at Tamanrasset or mountain tourism in Kabylie. Understanding which segments the operational pillars analysed in this thesis are currently best and least equipped to serve is therefore a necessary step toward a coherent development strategy.

1.2 The Tourism Industry

The notion of what exactly tourism is, and who the tourist is, has been covered in previous sections. Now we turn our attention to the industry, which arose to meet tourists' needs. This switch is very important because the tourism industry makes sure that the potential of tourism is fully realized. Despite being widely used in practice, it is not immediately obvious what tourism industry means, because unlike industrial sectors that have a well-defined output product, tourism industry produces heterogeneous services. It is important to know what the tourism industry is and how it functions before we try to analyse it strategically.

1.2.1 Concept and Objectives of the Tourism Industry

1.2.1.1 Supply-Side and Demand-Side Views of the Industry

From a conceptual perspective, tourism industry could be defined as a set of enterprises and institutions that purposely specialize in provision of goods and services to tourists, and derive an appreciable portion of their revenue from expenditures made by visitors. According to Leiper, the tourist industry consists of all firms, organizations, and facilities whose task is to satisfy the needs and wants of tourists, and that target their marketing efforts towards tourists in order to make them their primary client base.¹ This supply-side definition separates the enterprises that are specialized in tourism (hotels, tourism-oriented transportation providers, and tour operators), and those that are only occasionally visited by tourists as secondary clientele (general retail shops and transportation that serves mainly residents).

A demand-oriented perspective takes the opposite starting point: it aggregates all goods and services consumed by tourists, regardless of whether the supplying enterprises primarily serve tourists or the general public. This is the logic underlying the Tourism Satellite Account (TSA) methodology, which was jointly developed by the United Nations, OECD, Eurostat, and UNWTO precisely because conventional

¹Leiper, N. (1979). *The framework of tourism*, p. 400.

sectoral accounts cannot capture tourism's diffuse, cross-sectoral contribution.¹ By linking tourism expenditure data with input-output tables, a TSA can estimate the industry's direct, indirect, and induced contribution to GDP—a figure that conventional industry statistics dramatically understate. For the purposes of this thesis, the two perspectives are complementary rather than competing: the supply-side lens is used to map the operational pillars and their institutional architecture, while the demand-side lens informs the assessment of tourism's economic weight and its comparison across Algeria and Morocco.

1.2.1.2 Tourism Product and Integration of Tourism Industry

The definition of tourism product by Smith helps us understand the specific nature of the tourism industry. According to Smith, tourism product is always composite and includes five basic components: the physical plant (the material environment and facilities); the service (technical accomplishment of tasks); the hospitality (welcome and friendliness); the freedom of choice (tourist's selection of options); the involvement (personal participation of the tourist).² The tourism industry may thus be described as the institutional system of assembling, coordinating, and delivering the above mentioned elements in various combinations in order to satisfy tourists' requirements, desires, and expectations.

It clearly shows that the tourism industry should be seen more as a system integrator. No tourism enterprise exists alone because it needs a transport company to bring clients, an attraction to entertain them, a tour operator to combine services, etc. Besides, there are destination management organisations and tourism associations coordinating this system of actors on destination level. Thus, it cannot be described as an industry in a narrow sense, but as a network of several industries and organisations that work together—either in cooperation or competition—to produce a particular tourism product.

¹UN, Eurostat, OECD, & UNWTO. (2010). *Tourism Satellite Account: Recommended Methodological Framework 2008*. United Nations, pp. 1–4.

²Smith, S. L. J. (1994). *The tourism product*, p. 587.

1.2.1.3 Multilevel Objectives of the Tourism Industry

The objectives of the tourism industry operate simultaneously at the firm, sectoral, and national policy levels, and these levels do not always align. At firm level, commercial tourism enterprises pursue financial sustainability through the optimisation of revenue-generating metrics: accommodation providers focus on occupancy rates, average daily rate, and revenue per available room (RevPAR); tour operators manage yield per seat and package margin; restaurants track covers per service and average spend per head. These operational metrics are the immediate determinants of firm viability, and their aggregate performance across a destination's industry constitutes the sector's commercial health.¹

At the sectoral and destination level, objectives are more complex and frequently involve trade-offs that individual firm decisions do not resolve automatically. Economic objectives—generating foreign exchange, diversifying the revenue base away from commodity dependence, creating employment across skill levels, stimulating the agricultural and manufacturing multiplier—are well-understood but their achievement depends on the leakage rate: how much of each tourist dollar circulates domestically versus flowing to foreign-owned firms, imported goods, and repatriated profits. For Algeria, where the hydrocarbon sector currently dominates export earnings, the tourism sector's potential as an economic diversification vehicle is substantial but realising it requires deliberate policies targeting domestic supply chain development, not just arrival numbers. Social and environmental objectives—heritage conservation, community benefit, environmental carrying capacity management—introduce further complexity because they can conflict with the short-term commercial imperatives of individual firms, requiring governance mechanisms to align private and public interests.

On a strategic level, the tourism industry seeks competitiveness and resilience as destination and firms are competing against each other to gain larger market share.

¹Ivanov, S., & Zhechev, V. (2012). Hotel revenue management: a critical literature review. *Tourism*, 60(2), 175–197, p. 178.

However, at the same time they need to preserve attractiveness, maintain high quality of service provision, and innovate continuously. Additionally, they need to be resilient to various shocks (economic crisis, pandemics, natural disasters, political instability). All these objectives dictate its organisational structure and relations with wider environment.

1.2.1.4 Industry Structure, Players, and Interdependencies

Various organisations participate in the process at all levels. Core participants are tourism enterprises (hotels, transport companies, tour operators, travel agents, restaurants, attractions, and others) supported by surrounding network of secondary industries (construction, food production, financing, and others) providing the industry with necessary inputs. Public authorities of all levels create a framework of regulations and infrastructure in which enterprises work. Local communities and tourists also have an impact on tourism industry through active participation and preferences.

The structure of the industry may be described via its value chain as indicated by Smith's production model, which sees tourism industry as a value chain from primary inputs (land, labor, and capital) through intermediate products and services to final product—the tourists' experience itself.¹ Implications of the above definition are profound: competitive advantage comes not from the performance of individual firms, but of the entire value chain. The deficiency in a certain component will undermine competitive advantages in others. What is more, tourism is partially industrialised as described by Leiper,² which means that not all of its inputs are formally organised (climate, landscape, atmosphere, etc.).

This value chain creates a number of backward and forward interdependencies between tourism industry and other industries. First, the industry consumes domestic inputs, which generates multiplier effect. Second, tourism triggers various activities (transport services, creative sector, etc.) that create additional positive effects be-

¹*Ibid.*, p. 584.

²*Ibid.*, p. 401.

yond tourism industry. In this way, tourism becomes a major engine for development of local economy. In addition to this, tourism industry segments itself according to the kind of markets (leisure, business, cultural, religious, and health), each of them having unique demands, infrastructure needs, and competitive conditions.

1.2.2 Reasons for the Development and Spread of the Tourism Industry

1.2.2.1 Factors Related to Economic Development and Time Resources

Explaining why the tourism industry grew at the rate it did over the twentieth century requires integrating multiple causal factors that interacted rather than operated independently. The enabling condition was income growth: until households possess discretionary income above subsistence, tourism remains an elite activity. Post-war reconstruction, productivity gains, and the welfare state in developed economies delivered precisely this condition to mass populations for the first time in the 1950s and 1960s, transforming tourism from a class privilege into a mass consumption good. The same dynamic is currently unfolding in emerging economies—China, India, Southeast Asia—where a rapidly expanding middle class with disposable income and rising aspirations is generating the largest new outbound tourism markets in history, fundamentally reshaping destination strategies worldwide.¹

On the question of time, the development of tourism was driven by the introduction of paid holidays, reductions in working time, and the implementation of retirement plans. Once individuals receive time off guaranteed by their employers, they become able to plan and embark on trips. At the same time, new time patterns emerged: people started to take weekend city tours, organize quick vacations on public holidays, and use discounts offered during off-peak seasons. Operators started to provide their services, responding to new time-based trends: short break packages, late booking deals, and flexible arrangements.

¹UNWTO. (2023). *Tourism Highlights, 2023 Edition*. Madrid: UNWTO, pp. 4–6.

1.2.2.2 Technical, Political, and Cultural Factors Driving the Development of the Industry

The second factor in question relates to technological progress in travel. Innovations in transport and information/communication services led to the emergence of new tourism opportunities. New ways of moving between destinations and changing information costs resulted in higher efficiency and greater attractiveness of tourism products: first railroads, then steamboats, automobiles, jets, and finally fast trains enabled longer distances to be covered in increasingly shorter periods of time and even reduced travel costs, especially those related to air travel. The emergence of low-cost airlines increased the affordability of flights for millions of people, which contributed to the rapid development of short-haul international tourism. Changes in information technologies helped promote new business models, making information available to consumers and transactions cheaper. In addition, new information technologies enable operators to engage in marketing activities online.

Politically, one can point out the changes in visa and travel regimes in various regions and countries. In many places, international tourism is promoted by governments through policy initiatives and institutional changes that remove obstacles to travel. At the same time, sometimes security problems and geopolitical challenges result in increased regulatory obstacles to tourist movement. On the national level, one observes the active use of explicit tourism policies by states in the form of strategic planning initiatives, promotion programs, and investment initiatives aimed at stimulating tourism development. Infrastructure, education, and regulation efforts create an enabling environment that facilitates the emergence and expansion of private businesses in the field.

From a cultural perspective, the key driver relates to changes in social structure. Growing urbanization and intensification of work processes increase the need for vacationing. Beyond that, the modern society becomes more interested in traveling due to the shift in values that emphasizes the importance of personal development, creativity, and entertainment. In response, tourism companies started to diversify

their services based on new forms of tourism that emerge as responses to the new motivation. Tourists are provided with cultural tourism, wellness tourism, and adventure tourism. The industry develops through demand and through proactive supply-side measures aimed at its growth, such as promotion of destinations and opening up new destinations by airlines and operators. The interaction of drivers contributes to the development of new geographic locations with the emergence of outbound/inbound tourism in emerging nations.

1.2.3 Means of Developing the Tourism Industry and Its Success Factors

1.2.3.1 Development Means and Planning

The first means in question is the provision of relevant physical and service infrastructure. Tourism relies on physical connections between sources of tourists and destinations. It requires the presence of transport infrastructure that will enable access to the destination. Therefore, airports, sea ports, railroads, motorways, and local transport networks should be created. Such infrastructure is key to achieving accessibility, which is one of the main determinants of the destination's competitiveness. Added to this, the existence of basic utility infrastructures such as water supply and sewer systems is necessary for supporting functioning tourism-related businesses. The provision of such infrastructure typically requires government investment in aviation, railroads, and transportation. Private investors may invest in accommodation, recreation facilities, and specialized services.

The second means used to develop the tourism industry refers to strategic management of tourism development in destination areas. In order to develop tourism in a destination, proper planning efforts should be undertaken. First, potential resources should be evaluated to determine their tourism value and possibilities of exploitation. Next, potential demand should be estimated, and objectives set based on the assessment. Then, decisions concerning types and localization of investments

should be made based on strategic considerations regarding tourism development, such as avoidance of environmental damage and economic benefits for local communities. Often destination management organizations play an important role in implementing tourism management practices in destination areas.

1.2.3.2 Human Resources, Marketing, and Institutions

Investment in human capital is another means of fostering a robust tourism industry. Due to the experience-oriented and service-oriented nature of the tourism sector, human resources are very important. Educational programs on hospitality and tourism management, language skills, guiding, and customer service support professionalisation and improving service quality. Working conditions, career opportunities, labor policies, etc., also influence the attractiveness of tourism employment. High employee turnover and labor shortage may harm the quality of services and prevent the innovation of the tourism sector. Thus, the investment in human capital via formal educational systems and on-the-job training is vital for tourism industry development.

Marketing and promotion are important for attracting tourists since destinations and firms operate in competitive and overcrowded informational environments. Strategic branding and positioning involve defining a unique and attractive brand. Promotion should reach its target segments of consumers. Digital marketing tools and social media transform these processes into interactive communication with potential and former guests, sharing user-generated content and making promotions based on collected data. At the same time, marketing efforts have to match the capacity of the destination and the quality of services provided and avoid promising what a destination or a firm cannot deliver. Marketing for the tourism industry requires not only creativity but also credibility.

Legal regulations and institutional arrangements are another means of fostering tourism development. Clear and coherent legal regulations concerning land use, construction requirements, environmental regulations, health and safety requirements,

taxes, permits, etc., ensure stability in the tourism industry and facilitate its development and operations. As well, incentive programs aimed at encouraging desirable kinds of tourism development (e.g., sustainable tourism or tourism in underdeveloped areas) involve subsidies, tax relief, preferential lending, etc. Participation processes involving local communities in decision-making and benefit distribution are also important since they can legitimize the development projects. An efficient institutional design underlies both growth and governance of the tourism industry. It is evident that development will be most efficient when a structured collaboration between government bodies, firms, and local communities is arranged. This collaboration will ensure that investment in underutilized assets yields broad benefits for stakeholders, allowing them to share gains while maintaining accountability in governance.¹

1.2.3.3 Core Success Factors

It is evident that some of the means of tourism industry development discussed above become success factors themselves. One such factor is the capacity of tourism developers and operators to sustain their resource base over the long term. Destinations that use their natural and cultural resources wisely are more likely to stay attractive and competitive in the tourism industry in the long run. Another success factor is the level of social support and involvement of the local population in the process of tourism development.

Further, innovation and adaptability of tourism industry players are also critical success factors since they determine whether the tourism businesses survive in an ever-changing competitive environment. In other words, it is central to develop innovative products, processes, business models, etc. and to gain experience through learning. Lastly, the ability of tourism operators to manage risks and increase the resilience of their activities can be regarded as a success factor since the tourism industry is particularly susceptible to various shocks, such as pandemics, natural

¹UNWTO. (2019). *Governance for the Tourism Sector and its Measurement*. Madrid: UNWTO, pp. 14–18.

and technological disasters, and political upheavals.

1.3 Fundamental Resources and Pillars of Tourism Development

Now that the theoretical and industrial dimensions of tourism are described, there is one more issue to address before completing this conceptual model. Regardless of how efficiently organized an industry is, it cannot work without resources. Therefore, the development and operations of the tourism industry rely on a number of fundamental resources and support systems, forming tourism development pillars. They are natural resources of tourism, cultural and human resources, and tourism-related infrastructure and economic support systems. This section discusses their nature and roles in developing the tourism industry.

1.3.1 Natural Tourism Resources

Natural resources constitute the primary attraction base for a large and growing share of tourism demand. Unlike manufactured attractions, they are geographically fixed and non-reproducible: the Sahara cannot be relocated, the Atlas Mountains cannot be replicated, and the Mediterranean coastline cannot be expanded. This spatial fixity is simultaneously tourism's greatest strategic asset and its most fundamental vulnerability—assets cannot be moved to where demand is, so demand must be induced to come to where assets are, which in turn depends entirely on the accessibility, infrastructure, and service quality that the operational pillars provide. For Algeria, whose most distinctive natural assets (Saharan landscapes, thermal springs, high mountain ranges) are located far from the international gateways through which visitors typically arrive, this spatial logic is a central structural challenge.

Algeria's natural resource base illustrates the strategic range that natural assets can span. Topographic diversity—the Tell Atlas and Saharan Atlas ranges, the Ahaggar and Tassili n'Ajjer massifs, the plains of the high steppe, and over

1,200 kilometres of Mediterranean coastline—creates the conditions for an unusually wide portfolio of nature-based tourism activities, from mountain trekking and rock art tourism in the south to coastal leisure and thermal bathing in the north. Hydrological assets, including the thermal springs concentrated in the northeast and the ephemeral river systems and oasis landscapes of the Saharan interior, support health tourism and desert experience products respectively. The country's biotic resources—endemic Saharan fauna, migratory bird populations, and remnant Mediterranean forest ecosystems—offer wildlife and ecotourism potential that remains almost entirely undeveloped in commercial terms. Climate, finally, creates both opportunities and constraints: the Mediterranean north offers a classic summer peak season, while the Saharan south is best accessed in the cooler months of autumn and spring—a natural complementarity that, if exploited through coordinated marketing, could extend the national tourism season and smooth occupancy pressures.¹

A critical analytical point is that the tourism value of a natural resource is not intrinsic to the resource itself: it is socially constructed and economically conditioned. The same landscape that one culture reads as hostile, barren, or sacred may be experienced by another as dramatic, exotic, or spiritually enriching. The Algerian Sahara is the clearest example: what was historically navigated by traders and nomads as a route to be crossed has been reframed, through cultural production and destination marketing, as a spectacular wilderness to be experienced. This reframing is not automatic; it requires interpretive infrastructure—guides, narrative, designed visitor itineraries—and targeted promotion in markets where Saharan aesthetics resonate. The tourism industry's role is precisely this: to interpret, frame, and make accessible resources that have intrinsic qualities but whose commercial potential depends entirely on the institutional apparatus surrounding them.²

Tourism does place some pressure on natural resources. If the number of tourists

¹ONT (Office National du Tourisme). (2020). *Potentiel touristique de l'Algérie*. Alger: ONT.

²Hall, C. M., & Page, S. J. (2014). *The Geography of Tourism and Recreation* (4th ed.). Abingdon: Routledge, pp. 48–51.

and their activities are not regulated, there will be soil erosion, vegetation destruction, pollution, and even animal disturbance. Tourism infrastructure might cause fragmentation of habitats, hydrological disturbances, and other changes in natural processes. Finally, climate change affects the tourism sector since ecosystems are modified by global warming and there occur more frequent natural disasters, which might also be detrimental to some tourism forms because of changes in climatic factors. All these aspects make it crucial to consider environmental matters when tourism business is planned and managed.

The management of natural tourism resources has to be integrated. There are various tools, such as zoning, visitor management, carrying capacity, and environmental impact assessments, which would allow one to balance use and conservation of resources. Often, protected areas play a key role in it by providing structures for conservation and tourism use regulation. At the same time, tourism could contribute positively to conservation through providing incentives and finances. Tourism-related jobs might become alternatives to more harmful activities in terms of ecology. Thus, the relationship between tourism businesses and natural resources is two-sided in the sense that natural resources become the basis of tourism and its mode of operation determines the sustainability of these resources. This means that, from the point of view of sustainability, the tourism business could remain sustainable only if it is conducted in line with the laws of ecology and reduces resource exploitation, controls pollution, and protects biodiversity and landscapes. Indeed, any environmental problems caused by the business would decrease the appeal of the destination and would be impossible to compensate for using marketing instruments alone.¹

1.3.2 Cultural and Human Resources

Cultural resources introduce a second, fundamentally different type of tourism asset. Where natural resources are geographically given—their existence independent

¹United Nations World Tourism Organization & United Nations Environment Programme. (2005). *Making Tourism More Sustainable: A Guide for Policy Makers*. Madrid: UNWTO.

of human action—cultural resources are accumulated historically and are therefore uniquely place-specific expressions of a particular society’s trajectory. The UNESCO framework distinguishes tangible cultural heritage (archaeological sites, historic buildings, monuments, cultural landscapes, museum collections) from intangible cultural heritage (oral traditions, performing arts, ritual practices, traditional craftsmanship, gastronomy).¹ Both categories matter strategically for destination competitiveness, but they present different management challenges: tangible heritage can be conserved, restored, and regulated; intangible heritage is more fragile precisely because it lives in the practices of communities and can be degraded or commodified through tourism pressure without any physical deterioration that visible monitoring would detect. Algeria’s exceptional cultural asset base—Roman ruins at Timgad and Djémila (both UNESCO World Heritage Sites), the M’Zab Valley’s Ibadite architectural tradition, the Tassili n’Ajjjer’s prehistoric rock art, and the living Berber and Arab-Islamic intangible heritage—spans both categories and provides the raw material for a culturally distinctive tourism identity that no regional competitor can easily replicate.

The cultural tourism or heritage tourism helps visitors learn about history, traditions, and lifestyles of the host community. It might become the source of funding and publicity, helping to conserve historical sites and traditions. However, tourism raises issues of authenticity and representation of cultural resources since there is always a risk of manipulation while staging them for the tourist. In addition, such use might affect their meaning and function, so the tension between accessibility of culture and respect for its original nature needs to be addressed.

Human capital is the resource that most directly mediates the quality of the tourist experience—and the one most consistently identified as a constraint on Algeria’s tourism development. Because tourism is an inherently service-intensive industry, the technical knowledge, linguistic abilities, cultural competence, and service orientation of front-line workers shape every tourist’s direct encounter with the

¹UNESCO. (2003). *Convention for the Safeguarding of the Intangible Cultural Heritage*. Paris: UNESCO, Art. 2.

destination. Unlike infrastructure, which can be built quickly given capital, human capital accumulates slowly through formal education, vocational training, and practical experience. This means that deficits in hospitality training and tourism management education—which multiple assessments have identified in Algeria—create a structural service quality ceiling that physical investment alone cannot raise.¹ For the purposes of this thesis, human resources are therefore treated not as a background condition but as a distinct dimension of the operational pillar assessment.

From the perspective of tourism management, human resource concerns include employment issues, like recruiting and retaining employees, and managing human resources, which implies their professional development, training, remuneration, working conditions, and labour mobility. The presence of many small and medium-sized businesses, seasonality, and sometimes even unofficial employment in the tourism industry makes workforce planning problematic. On the other hand, tourism destination and business success depend increasingly on service quality and differentiation, so human resources become an increasingly important factor.

As was already noted, local communities make two valuable contributions to the tourism business. First, local people provide necessary labour for tourism. Second, they provide unique culture to be used in marketing campaigns. Attitude of local community towards visitors influences the image of destination significantly. It is obvious that tourism should be conducted in partnership with locals and involve community participation in tourism planning and development. Local participation in tourism might prevent adverse effects, such as excessive cultural commodification, forced migration, and reduction of local access to resources. There are also examples of community-based tourism development and participatory governance systems in the industry.

¹Al-Ababneh, M. M. (2013). Service quality and its impact on tourist satisfaction. *Interdisciplinary Journal of Contemporary Research in Business*, 4(12), 164–177.

1.3.3 Infrastructure and Economic Support Systems

Along with natural and cultural-human resources, infrastructure and economic support systems are equally important for the development of tourism. These aspects determine the enabling environment for tourism businesses to conduct operations and for tourists to reach the destination and benefit from it. They are the structural foundation of the tourism industry.

The most noticeable aspect is represented by transportation infrastructure that includes airports, seaports, railway stations, highways, and other modes of public transportation connecting the tourist-generating regions, transit regions, and destinations, as indicated in Leiper's model of tourism systems.¹ The efficiency, quality, and pricing of transportation services affect both the magnitude and composition of tourism flows. In destinations, local transportation infrastructure will affect how easy it is for tourists to move around in the destination and explore different areas of it, which will impact their spatial behavior and the distribution of benefits of tourism activity within the destination. The tourism industry relies on this type of infrastructure to attract tourists and circulate them among different tourism activities.

Other basic utilities, such as water supply, electricity, telecommunication, sewage disposal, and waste management are critical both for providing tourism services of decent quality, protecting the health of tourists, and preserving the image of the destination; at the same time, increased tourism demand may put additional stress on these infrastructures during peak seasons, so they require proper management. This reliance means that tourism companies and destinations should participate in the process of planning and constructing transportation infrastructure.

Accommodation infrastructure is the component of the tourism system whose quality most visibly signals a destination's development level to international visitors and investment communities. It is also the component in which Algeria's deficits are most systematically documented: international assessments consistently note in-

¹Leiper, N. (1979). *The framework of tourism*, p. 397.

adequate four- and five-star supply in major cities and near key heritage sites, poor maintenance standards in mid-range properties, and an almost complete absence of the boutique and heritage accommodation formats that premium experiential segments demand.¹ The food service and entertainment infrastructure surrounding accommodation properties—restaurants, cafes, leisure facilities, conference centres—amplifies or compounds the accommodation experience: a well-managed hotel surrounded by poor dining and limited leisure options cannot sustain high occupancy from repeat visitors. The composite quality of this hospitality infrastructure cluster, viewed as an integrated system rather than a set of independent establishments, is therefore the most important short-term determinant of Algeria's capacity to retain visitors beyond initial curiosity visits.

Economic infrastructure includes financial institutions and markets, which finance investments in tourism infrastructure and enterprises. Depending on the availability and terms of financial services, the development and expansion of the tourism industry may be affected. In particular, small- and medium-sized tourism enterprises may face the challenge of securing adequate financing. Public sector investments or collaboration between the government and private organizations are common solutions for addressing the problems associated with the lack of capital.

Another aspect of institutional support for tourism industry development relates to legal and regulatory frameworks. In particular, rules governing land use, licensing of businesses, labor relations, consumer protection, and environmental management can provide certainty and predictability for investors and business owners in the tourism industry. In addition, specific policies regarding the zoning of territories, requirements for meeting certain environmental standards, and managing cultural and heritage sites can have an impact on the way the tourism industry operates. Specific organizations responsible for managing the tourism industry in a country or region, such as ministries of tourism, national tourism organizations, and destination management organizations, serve as institutional support as well.

¹World Bank. (2019). *Algeria Economic Update: Harnessing the Tourism Potential*. Washington D.C.: World Bank.

Modern tourism industry is characterized by increasing reliance on information technology. Data on tourist flows, demographic characteristics of tourists, their level of satisfaction with services received, and economic contribution of tourism to the destination are essential for planning decisions. Statistical systems, research institutes, and other information and monitoring tools can provide relevant data on these topics.¹ Besides, internet connectivity, digital platforms, and general IT allow for effective marketing, reservations of services, customer relationship management, and even direct interaction with customers online.

The three pillars mentioned above—natural tourism resources, cultural and human resources, and infrastructure and economic support systems—cannot function in isolation from each other. Instead, the ways these pillars interact can either enhance or inhibit tourism industry development. Rich natural resources can be the basis for attracting tourists, yet without sufficient infrastructure and trained workforce, the tourism industry will be relatively small-scale or even informal and prone to environmental degradation. At the same time, sophisticated infrastructure and a professional workforce will hardly make up for the absence of a sufficiently attractive natural or cultural resource base. Positive synergies occur in cases where investments and policies work in concert across different pillars: improved transport accessibility combined with development of community-based tourism products and training of local staff can lead to the creation of quality experiences for tourists that will contribute to conservation efforts at the same time. In practical terms, the recognition of these synergies involves implementation of environmental management practices, investments in environmentally friendly technologies, engagement of local communities, and transparency of interactions with them—all these steps help transform sustainability considerations common to all three pillars into competitive advantages and better performance of tourism industries.

¹UNWTO. (2008). *IRTS 2008*, p. 7.

Chapter Conclusion

This chapter laid down the foundations for this thesis. After reviewing what was covered here, there are several points worth emphasizing. First, the definition and history of tourism were provided. The focus was put on the main characteristics of tourism and the different perspectives on it, while also analyzing tourism at multiple levels. Second, the tourism industry itself was introduced along with discussion of the nature of its product, organizational structure, and its development. Finally, the third group of topics included in this chapter related to natural tourism resources, cultural and human resources, and infrastructure and economic support systems.

These resources are crucial for developing tourism industry and determining its performance in the destination. Each resource is critical but insufficient alone; moreover, the synergies and conflicts between different resources, along with the consideration of sustainability in all of them, can make the difference between sustainable and unsustainable tourism development.

All of these theoretical components together create the consistent foundation for the examination of the structure, performance, and developmental trends in the tourism industry. Performance in tourism is not purely dependent on good fortune or geography — it is a product of effective interaction of all the country's industry, institutions, and resource systems. And this will be precisely the perspective adopted to discuss the operational pillars considered in the next chapter and the Algerian case to follow.

CHAPTER 2

Operational Pillars of the Tourism Industry

Introduction

In the previous chapter we discussed the essence of tourism and the nature of the industry that has been formed around it. As it seems the obvious next step, Chapter Two explores the operational machinery of the tourism industry and thus continues the analysis that started in Chapter One. The chapter focuses on concrete service systems through which the demand for tourism is materialised into experiences, incomes, and results — i.e., what the present work calls the operational pillars of the tourism industry. While pure theory cannot explain why two destinations with comparable resource endowments differ in their performance. That difference can be traced to the efficiency of their operational systems — which makes this chapter relevant to the Algerian case considered below.

Very few industries match tourism in sheer economic importance. As per estimates released by the World Travel and Tourism Council (WTTC), travel and tourism generated \$8.8 trillion in total output or around 10.4% of the world's GDP in 2018, and provided direct or indirect employment to almost 319 million people.¹ According to the estimates produced by the World Tourism Organization (UNWTO), international tourism exports totalled \$1.7 trillion in the same year, making tourism the third largest export sector in the world, after chemical products and fuels.² Of course, such impressive economic figures were not just lucky. Representing the cumulative effect of millions of transactions carried out by various operational sub-

¹WTTC. (2019). *Travel & Tourism Economic Impact 2019: World*. London: WTTC.

²UNWTO. (2019). *International Tourism Highlights, 2019 Edition*. Madrid: UNWTO.

systems of the industry — namely, accommodation services, transport services, tour organisation services, recreation services, and catering services — they should be explained first and foremost by the nature and efficiency of these systems. And it is precisely the topic this chapter is devoted to.

One important aspect that is frequently overlooked is that the tourism industry provides for international tourists and the internal market of tourists as well. As per the available statistics, in 2018 there were roughly 9 billion domestic overnight trips recorded globally — almost six times the number of international arrivals in the same year.¹ As a complementary source of information, WTTC reports that the share of domestic tourism in the total amount of global tourism expenditure reached almost 73% in 2017.² Hence, the operational pillars discussed in this chapter should be considered the systems providing services to a diverse and heterogeneous demand, and not to international leisure tourists only.

The chapter is divided into six major sections. The first part explains the concept of tourism industry pillars, introduces the classification of pillars, and discusses their roles in tourism development. Following this general introduction, each of the remaining sections examines specific pillars in turn: tour organisation and travel agencies; hotel management and tourist accommodation; recreation management and tourism services; food and catering services; and tourism transport systems. In each section the main attention is paid to the operations, significance, and management aspects of the discussed subsystems of the tourism industry.

¹UNWTO. (2020). *Tourism and COVID-19: Understanding Domestic Tourism and Seizing its Opportunities*, Briefing Note No. 3. Madrid: UNWTO.

²WTTC. (2018). *Domestic Tourism: Importance and Economic Impact*. London: WTTC.

2.1 Concept of the Pillars of the Tourism Industry

2.1.1 Definition of Tourism Industry Pillars

Any discussion of the tourism industry's operations begins with establishing the definition of tourism industry pillars. Specifically, an operational pillar of the tourism industry is a type of services and organisations involved in producing the services that fulfil a certain crucial function in the system of tourism, operate with the aid of specific business models and professional standards, and make a tangible contribution to the quality, continuity, and consistency of the entire experience. More specifically, each pillar of the industry should meet the following criteria. First, it is indispensable, i.e., its absence would practically preclude the functioning of tourism in any form whatsoever. Second, it is organisationally distinctive, i.e., each pillar represents unique institutional architecture, technology base, regulatory framework, and workforce profile. Third, each pillar has a visible effect on the experience of tourists.

To define an operational pillar it may be necessary to distinguish between the operational layer of the tourism industry and its foundational layer of natural and cultural resources. As was explained in the previous chapter, a destination's natural endowment and the cultural traditions embodied in it represent the *content* of tourism — the heritage, ecosystems, and social life forms that render a particular destination attractive to tourists. Operational pillars, on the other hand, serve as mechanisms delivering that content — packaging, communicating, and selling it to tourists. A pristine coastline or a historic city district are useless until they have efficient accommodation facilities, reliable transportation, tour organisers, experienced guides, and good food services. Without operations, even the most resource-rich destination can remain largely untapped in tourism.

This distinction also highlights the issue of practice faced regularly by destina-

tion managers and policymakers: two similar in terms of natural resource endowment destinations may prove differently successful in terms of number of visitors, money spent by average visitor, and levels of guest satisfaction. The factor that may cause the difference is exactly the quality and integration of operational pillars. For example, a destination with an inefficient system of accommodation, transport, organization of visits, and catering may prove unable to compete with a not so naturally attractive one that possesses a well-structured and high quality infrastructure system of services.

An additional important characteristic feature of operational pillars is that they keep evolving constantly. The composition of pillars from inside, types of business models they embrace, and the technologies they make use of keep changing constantly because of the pressures coming from market competition, changes in consumption preferences, new legislation, and innovations. Online booking systems, peer-to-peer accommodations, low-cost airlines, and sustainability-based business practices are just examples of evolution. In case a study of operational pillars is to be conducted, the dynamic approach should be chosen, since there can be no fixed state of things.

Finally, there is an obvious structural interdependence between the pillars. None of them can perform successfully without the rest of them. Accommodation businesses rely on the transport services to bring guests. Tour companies need services of transportation, accommodation, and recreational organizations to put together touristic packages. Food service organizations operate due to the inflow of visitors created partly due to activities of travel agencies and tour organizations. In other words, a failure in one pillar creates a negative effect on the entire complex. On the contrary, the combined investment in improvements of multiple pillars leads to a compounded positive effect for the entire destination.

2.1.2 Classification of Tourism Industry Components

How to classify the industry components in the best possible manner? This question has long troubled scholars, institutions, and practitioners, and a range of classifications has emerged. Although there exists no agreed universal classification framework, there is some level of consensus on some aspects of it.

Statistically speaking, the IRTS 2008 classification, jointly developed by the UN Statistics Division and UNWTO, offers the most comprehensive answer.¹ According to this scheme, certain industries have been singled out as being the tourism-characteristic ones, meaning that economic activities in these industries are either non-existent or greatly reduced in volume or quality because of lack of tourism demand.² These include industries of visitors' accommodation, passenger transport, food and beverage service activities, travel agencies, and recreation services. This classification is demand-driven since activities are attributed to the tourism sector in accordance with the share of their outputs sold to visitors rather than to the residents of the area.

As shown above, the suggested classification matches the pattern of tourism expenditure quite accurately. UNWTO statistics show that typical components of tourism expenditure include accommodations, transport, foods, recreational and cultural activities, and purchases in shops.³ Each of these categories corresponds to the operational pillar studied in this chapter, hence confirming that the pillar approach is firmly supported by empirical evidence and scientific literature.

In a managerial context, scholars use typologies of tourism activities based on the place of those in the production chain or their relation to tourists. Some studies suggest dividing tourism activities into *core*, *supporting*, and *related* categories. Core activities are those directly used by tourists during their visit (accommodation, flights, tours, etc.), supporting ones are industries that provide necessary input for

¹United Nations Statistics Division. (2008). *International Recommendations for Tourism Statistics 2008* (IRTS 2008). New York: United Nations.

²United Nations Statistics Division. (2008). *International Recommendations for Tourism Statistics 2008* (IRTS 2008). New York: United Nations.

³UNWTO. (2020). *International Tourism Highlights, 2020 Edition*. Madrid: UNWTO.

core services (restaurants, construction companies, technology firms, etc.). Related activities are those benefiting from tourism although they do not focus on tourists (retail, banks, municipal transport, etc.).¹ This approach is particularly helpful in estimating the extent to which tourism expenditure is transformed into wider economic activities.

Looking at the product created by the tourism industry, there is another way of classifying its activities. Following Smith, it is possible to identify four stages of the tourism production process going from primary inputs (land, labour, capital), through intermediate inputs (infrastructure, facilities), intermediate outputs (accommodation services, transport services, guided tours), to final output (the actual tourist experience).² Thus, every tourism industry pillar creates and provides certain sets of inputs and outputs whose quality defines tourist experience.

The classification adopted for this chapter divides operational components of the tourism industry into five main pillars: (i) tourist organization and travel agencies, (ii) hotel management and tourist accommodation, (iii) recreation management and tourism services, (iv) food and catering services, and (v) tourism transport systems. This approach is consistent with the structure of tourism expenditure and theoretical framework. It matches existing classification in the academic literature and allows discussing each pillar in detail.

2.1.3 The Role of Tourism Pillars in Tourism Development

Tourism industry operational pillars play several functions that contribute to tourism development, understood here as the process of development of tourist attractions, increase of capacity of attracting tourists, generation of economic value, and its sustainable maintenance.

The first function performed by pillars is *economic conversion*. These are the main channels through which tourism demand is transformed into economic activity. Money spent by tourists creates income for providers of accommodations, transporta-

¹Cooper et al., *Tourism: Principles and Practice*, pp. 11–15.

²Smith, S. L. J. (1994). *The tourism product*, p. 584.

tion, tours, restaurant services, and recreation. The revenues from tourism are then used by them to purchase goods and services from other parts of the destination's economic system, creating multiplier and backward linkage effects. In addition, the effectiveness of these effects depends on the structure and property ownership in the pillars: the larger share of their tourism income stays inside of destination's economy the better. Local enterprise performs more efficiently in this respect than foreign owned companies and supply chains.¹

The second role is that of *experiential mediation*. Operational pillars are not just delivering what tourists would get on their own, but shaping and framing the tourist experience so that the destination comes across as attractive, comfortable, and authentic enough to recommend to other people. A tour guide knowledgeable about the history of the location and skilled in communication is able to transform an ordinary trip to the heritage site into a truly memorable experience. A restaurant that highlights local cuisines conveys something about the place that a brochure is unable to convey. Operational pillars act as interpretative and experiential amplifiers, making the underlying resource offering more valuable via the quality of services provided.

The third role is that of *spatial and temporal mediation*. Operational pillars do not just determine the extent of tourism flows, but the spatial and temporal pattern in which the flows arise. The itineraries designed by tour operators, the locations of the hotels and recreation facilities, the seasonality of recreational programmes, and the connections between different parts of the destination territory all influence the location of tourist flows and their seasonality. In numerous destinations, one of the key strategic objectives is to diversify the location and timing of tourist visits in order to reduce congestion of popular hot spots, extend tourism benefits to peripheral regions, and maximise the use of tourism infrastructure throughout the year. Operational pillars are the primary means through which such a redistributive strategy could be implemented.

¹Mitchell, J., & Ashley, C. (2010). *Tourism and Poverty Reduction: Pathways to Prosperity*. London: Earthscan/ODI.

The fourth role is *market linkage*, whereby the operational pillars, notably tour operators, travel agencies, and transport providers, serve as the institutional link connecting source markets—the places where potential tourists reside and make decisions—to destination resources. International tour operators, online tourism portals, and the airline network effectively define to which destinations each specific market segment would have access and on what terms. If a particular destination does not feature in the catalogue of international tour operators, cannot be conveniently accessed via air transportation, or is not featured on the major web-based distribution channels, it would have little chance of attracting visitors regardless of how attractive its destination resources might be. On the flip side, a well-connected and strategically positioned destination may be able to increase the scope of its market presence dramatically without developing additional resources.

Finally, operational pillars can act as *resilience mechanisms* in case of disruptions. Events such as an economic recession, disease outbreak, political instability, or natural disaster may lead to abrupt reductions in tourism demand. Ability of the operational pillars to absorb and recover from the shock will determine how soon the tourism system recovers to normal operations. Ability of tour operators to redesign tours, switch markets, and create new products, ability of hotels to respond to changes in demand by altering their capacity and cost structure, ability of the transport companies to provide essential connectivity, and ability of recreation providers to move towards domestic and regional market—collectively, these adaptive capabilities define the level of resilience in the face of tourism disruption. Investment in operational capability should thus be viewed as a strategy for growth, but also for risk management.

2.2 Tour Organisation and Travel Agencies

2.2.1 Organization of Tourist Trips and Tour Operators

Tour organisation is the process of identifying, evaluating, negotiating, and combining a variety of otherwise disconnected individual tourism services—international flights, ground transportation, accommodation, dining, excursions, and related amenities—into a coherent and marketable holiday package. This process is critically important to tourism because it helps to overcome one of the major obstacles faced by tourism demand: the information overload associated with the task of planning a trip to an unfamiliar destination. The tour operator is essentially taking up this burden in order to simplify the purchasing process for the customer and to provide a higher guarantee of quality. In addition, the packaged product offered by tour operators often makes for a more convenient and affordable holiday than what the same service could provide if purchased individually.

As an identifiable business type, the tour operator originated in the middle of the nineteenth century due to pioneering efforts of Thomas Cook, who arranged his first railway excursion back in 1841 and developed an organisational model built on buying transport and accommodation capacity wholesale and selling it as an assembled product to travellers at low price points.¹ Despite a number of technological, commercial, and regulatory changes that happened since the times of Thomas Cook, the model of negotiating ahead of the season for future capacity and selling that capacity in bulk at competitive prices has remained the organisational core of tour operating businesses until today. Contemporary tour operator works through a cyclical process involving research, product development, procurement of the necessary services from suppliers, and coordination of all activities on the ground.² Procurement is a critical phase, since operators buy blocks of transport and accommodation from carriers ahead of time at fixed prices, thereby taking risk of unmet sales. This business

¹Holloway, J. C., & Humphreys, C. (2019). *The Business of Tourism* (10th ed.). Harlow: Pearson.

²Page, S. J. (2019). *Tourism Management* (6th ed.). Abingdon: Routledge.

logic—commitment to future supply and competitive pricing—still forms the basis of tour operator business model, despite the fact that pricing and booking processes have largely become automated thanks to advanced digital technologies. Legally, the tour operator is obligated to ensure that all components of the travel package are delivered to the customer properly, which makes careful selection of the service providers and constant quality monitoring an indispensable part of the business.¹

Tour operators are structurally heterogeneous, and that heterogeneity has important implications for how destinations negotiate access to source markets. At the large-scale end of the spectrum, vertically integrated operators—which consolidate airline seats, hotel beds, and retail distribution under common ownership—achieve formidable cost efficiencies by eliminating margin at each step of the value chain. Their scale also provides negotiating leverage with suppliers and marketing reach that independent destinations cannot match unilaterally. The commercial logic of vertical integration is compelling, but it creates asymmetric dependency for destinations: a large integrated operator that withdraws from a destination—whether due to a crisis, a pricing dispute, or a strategic pivot—can reduce arrivals by tens of thousands of visitors overnight, as several North African destinations discovered following political disruptions in the 2010s.²

At the other end of the structural spectrum, small and niche operators—specialising in cultural history, adventure, religious pilgrimage, educational visits, or luxury tailor-made travel—compete not on price but on knowledge depth and experiential curation. Their commercial model is more labour-intensive and less scalable than the mass-market package, but they command higher margins and attract the explorer and experiential tourist segments that Cohen's typology identifies as most likely to generate authentic cultural exchange. For destinations such as Algeria that possess distinctive natural and heritage assets but lack the infrastructure scale for mass-market packages, niche operators represent the

¹European Parliament and Council. (2015). *Directive (EU) 2015/2302 on Package Travel and Linked Travel Arrangements*. Official Journal of the European Union.

²Page, S. J. (2019). *Tourism Management* (6th ed.). Abingdon: Routledge, pp. 212–215.

strategically appropriate entry point into international source markets—a channel through which specialised demand can be engaged before the broader infrastructure investment required for volume tourism is in place.

2.2.2 The Role of Travel Agencies in Tourism Development

The travel agency is the retail face of tourism distribution channels. While the primary role of the tour operator is that of the wholesaler—creating a product and selling it to the market on behalf of many different suppliers—the role of the agency is that of the retailer—advising the consumer on various available options and selling them to them in the process. The line between wholesale and retail functions of travel business enterprises has become rather blurry due to digital revolution; today many tour operators sell directly to consumers through their own websites while some travel agencies have developed their own exclusive product range. However, this distinction between wholesale and retail functions has not ceased to be relevant.

There are three basic capabilities that the travel agent possesses and which consumers rarely possess themselves—those of interpreting information related to numerous destinations and packages offered, accessing supplier inventories, and managing the administrative aspects of the booking process, such as dealing with disruptions. According to Middleton et al., the last of these three aspects, in particular, stands out—a traveller whose trip goes wrong without having the support of a professional in an unfamiliar destination has quite a difficult situation compared to one who does. Even in a world of easy online booking of simple, single-component trips, travel agencies have maintained their competitiveness due to complex itineraries involving multiple destinations and components or high-value bookings.

There are several roles that travel agencies play in the broader context of tourism development, which go beyond their economic purpose. First of all, agencies participate actively in destination marketing efforts, whether intentionally or unintentionally, by recommending destinations and brochures to consumers and promoting destinations in particular ways to potential clients. Sometimes the promotion per-

formed by an agency is more cost-effective than conventional destination-wide advertising campaigns, especially in cases of under-promoted destinations—the advice given to a consumer who has shown interest in a particular destination has much higher credibility compared to a regular advertisement.

Another important task is gathering market intelligence—agencies gather vast amounts of information about consumers, what they want and expect from destinations and what they are disappointed with, what kind of destinations and itineraries interest them and what their price sensitivity level is. This information can be communicated to destination managers and tour operators in order to enhance the quality of products. The agencies are often the first to identify any trends affecting consumer preferences—be it positive towards a particular destination or negative after its standards declined.

The sector of travel agencies underwent significant transformation due to digitisation—many agencies went out of business or lost their customers to online alternatives. On the whole, however, agencies have survived by repositioning themselves as companies offering bespoke solutions for complex itineraries or specific travel needs (e.g. luxury travel or assistance for disabled tourists). The growth in popularity of independent travel that seeks tailored solutions that cannot be created online offers a new customer base for travel agencies.

Online travel agencies (OTAs) are a relatively new phenomenon that occupies the middle ground between traditional travel agencies and direct sellers. OTA businesses such as Booking Holdings and Expedia offer a wide array of services similar to that of traditional travel agencies—they curate and compare information on the services of various providers, offer a wide selection of destinations, and enable booking through a single website. At the same time, their ability to offer comprehensive services and convenience of use coupled with the opportunity to see reviews and feedback of other consumers on a wide variety of hotels and activities attracts a huge number of users. The emergence of OTAs has profoundly changed the competitive landscape of travel distribution channels by compressing margins for suppliers and accelerating

the process of migration from high-street channels.

2.2.3 The Contribution of Travel Agencies to Tourism Activity

In addition to individual transactions with individual consumers, the contribution of travel agencies to tourism activity is much broader than that. At the systemic level, tour operators and travel agencies can be considered as the demand redistribution mechanism of the industry—by determining the quantity of tourism activity, its seasonality, direction, segmentation, and character.

One of the most important contributions of agencies is their involvement in tourism seasonality management. The perishable nature of tourism services—the fact that empty seats in transport or unoccupied hotel rooms can never be sold later and thus lead to revenue losses for operators—provides a great motivation to induce tourism demand in the periods where capacity will be wasted otherwise. Tour operators and agencies are particularly good at managing tourism seasonality due to their ability to reach out to large audiences and create attractive itineraries for travel in shoulder seasons. Early booking discounts and incentives along with features highlighting the positive sides of visiting during quieter periods—such as smaller crowds, better prices, or particular events—can contribute to demand redistribution in favour of less crowded seasons. This results in better income stability for destination suppliers due to lower dependence on a few peak seasons.

One such related contribution is their role in shaping the spatial distribution of tourism activity. The geographic focus of the itineraries planned by the tour operators, as well as the range of destinations promoted by the travel agencies, directly affects the spatial distribution of tourism activity in terms of which areas of the destination actually receive tourists. In numerous cases, the spontaneous spatial distribution of tourism demand tends to be highly skewed toward well-known destinations, thus leaving vast swathes of the country untouched by tourism despite tourism potential in the region. Tour operators whose activities include less well-known des-

tinations in their tour itineraries, or those who design products that revolve around peripheral destinations with unique natural/cultural characteristics, can help drive tourist flows to these otherwise underutilised regions. The importance of this role for tourism development has been widely recognized by destination management organizations (DMO) and national tourism agencies, which proactively collaborate with tourism intermediaries in order to develop new products and spread infrastructure investments more evenly within the destination.¹

Gatekeeping is another role of travel agencies and tour operators that deserves consideration. The processes of building up supplier networks by major operators involve assessing the prospective suppliers against certain criteria of reliability, safety, quality, and client satisfaction performance, thus including only qualified suppliers in the operator's portfolio and excluding others from it. This leads to the inclusion of certain hotel/restaurant/activity providers in an operator's itinerary and a steady stream of business for these businesses and exclusion/ delisting for others who fail to meet the requirements. It is a rather informal form of quality assurance system which complements official classification and inspection, creating continuous pressure on destination-based suppliers to maintain and improve their characteristics.

In the context of destination crisis response and recovery, tourism intermediaries assume an increasingly significant role as well. If a destination suffers from some external shock such as natural disaster, public health incident, or political instability, the decision of major tour operators to either suspend bookings or reassure clients about the safety of the destination and resume bookings can make a world of difference in the speed of recovery. A tour operator that maintains their destination products through this period, possibly revising them so as to ensure safety and continue meeting demand, can send a very clear message that may greatly speed up the recovery process. Conversely, an operator that suspends bookings and stops marketing its products leaves a destination without a crucial channel for attracting visitors just when it might need them most. Thus, the management of the relation-

¹UNWTO. (2018). *Tourism and the Sustainable Development Goals: Journey to 2030*. Madrid: UNWTO.

ships between destination authorities and major intermediaries becomes an essential part of destination resilience strategies.

2.3 Hotel Management and Tourist Accommodation

2.3.1 The Hotel Industry and Its Importance

Among the operational pillars, accommodation occupies a structurally distinct position: it is the only service that tourists consume continuously throughout their stay, rather than in discrete episodes. From check-in to check-out, the accommodation property functions simultaneously as a shelter, a base of operations for daily excursions, a social space, and an experiential touchpoint that communicates something about the destination. This continuous, ambient quality means that accommodation quality does not merely contribute to the tourist's experience—it frames it: the same attraction visited after a comfortable night's rest and before returning to a well-managed hotel is evaluated more favourably than when either anchor is absent.¹

Economically, accommodation typically absorbs between 20 and 35 per cent of total tourist expenditure, a share that varies with trip length, destination price level, and accommodation category.² This places the accommodation sector among the largest single line items in tourist spending and explains why it is frequently the primary target of inbound tourism investment strategies. Employment effects extend well beyond the property itself: hotels and guesthouses generate demand for food suppliers, laundry services, construction firms, technology providers, and local artisans whose production is partly absorbed by the hospitality supply chain.

The global hotel market is characterised by a structural tension between inter-

¹Pizam, A., & Ellis, T. (1999). Customer satisfaction and its measurement in hospitality enterprises. *International Journal of Contemporary Hospitality Management*, 11(7), 326–339.

Türkay, O. (2015). Setting a research agenda for accommodation management. *International Journal of Contemporary Hospitality Management*, 27(3), 386–402.

²UNWTO. (2019). *International Tourism Highlights, 2019 Edition*. Madrid: UNWTO.

national brand consolidation and the persistence of independent operators. Major chains—Marriott, Hilton, Accor, Wyndham and their sub-brands—operate across dozens of countries, drawing competitive advantage from centralised reservation systems, loyalty programmes, and standardised quality assurance protocols that individual properties cannot replicate independently. However, this internationalisation carries a well-documented development cost: profit repatriation, management fees paid to foreign headquarters, and procurement from international rather than local supply chains reduce the proportion of accommodation revenue that circulates within the host economy.¹ For a destination pursuing inclusive tourism development—as Algeria’s strategic frameworks explicitly aim to do—this leakage dynamic argues for policies that favour domestically owned accommodation and local procurement requirements, without necessarily excluding international brands whose marketing reach provides irreplaceable access to source markets.

Apart from the international chains of hotels, the accommodation sector usually includes a large number of smaller, independent operators: family-owned guest-houses, boutique hotels, local resorts, etc., often incorporating some unique elements such as ecotourism or cultural tourism elements. While smaller in reach, these independent operators have greater ability to localize income and spend their revenue locally as well as purchase supplies from local vendors. In terms of tourism promotion, however, they usually suffer from inferior brand reputation and limited marketing opportunities, which is somewhat offset by active promotion of these facilities by destination management organizations, along with increasingly favorable market access conditions for small businesses provided by digital distribution platforms.

Importantly, a well-developed accommodation sector can significantly boost destination attractiveness by acting as a catalyst for the investment and development of surrounding areas. High-quality hotels that bring in international clients create the demand for transportation, restaurants, cultural activities, etc., in the surrounding area. Lack of suitable accommodations, on the other hand, can turn into an

¹Croes, R., & Vanegas, M. (2008). Cointegration and causality between tourism and poverty reduction. *Journal of Travel Research*, 47(1), 94–103, pp. 96–98.

absolute constraint for further development, holding destination development back. Thus, investment and development in the accommodation sector should be tied to destination's overall tourism development strategy.

2.3.2 Types of Tourist Accommodation Establishments

The accommodation sector is internally diverse in ways that have direct implications for destination development strategy. Rather than describing each type in isolation, this section analyses the main accommodation categories through three lenses that are central to this thesis: their revenue-retention profile (how much spending stays in the local economy), their positioning in the experiential spectrum (standardised versus authentic), and their relevance to Algeria's current capacity gaps.

Hotels form the backbone of most destination accommodation infrastructures. Classified under national and international star-rating frameworks, they are contractually obligated to maintain defined minimum service levels—reception, house-keeping, food and beverage—that give corporate and leisure clients a predictable quality guarantee.¹ The strategic significance of star ratings goes beyond marketing: they are the primary mechanism through which a destination signals its capacity to serve different market segments. A destination lacking four- and five-star supply cannot credibly target premium business travel or upmarket leisure segments, however attractive its natural resources may be—a structural constraint directly relevant to Algeria.

Resorts push the logic of the integrated product further by making the property itself the destination experience. The all-inclusive pricing model—in which transport, accommodation, food, drink, and entertainment are bundled into a single pre-paid package—is commercially attractive because it reduces tourists' in-destination spending decisions, but it generates the highest leakage rates of any accommodation format: revenue circulates within the resort compound rather than dispersing into local markets.² For development-oriented tourism planning, the all-inclusive model

¹UNWTO. (2015). *International Hotel Classification Guidelines*. Madrid: UNWTO.

²Croes, R., & Vanegas, M. (2008). Cointegration and causality between tourism and poverty

therefore requires careful consideration of its economic multiplier properties relative to less enclosed formats.

Guesthouses and bed-and-breakfast establishments occupy the opposite end of the leakage spectrum. Typically family-owned and domestically financed, they retain a higher proportion of tourism revenues locally and integrate more naturally into the host community's economy—purchasing food from local markets, employing neighbourhood residents, and narrating destination culture through personal interaction.¹ Their disadvantage is constrained marketing reach; without aggregation through destination management organisations or digital platforms, they struggle to achieve the visibility that corporate brands command automatically.

Youth hostels and budget accommodation serve primarily the backpacker and explorer segments identified in Cohen's typology, offering dormitory or semi-private lodging at minimal cost in exchange for shared social spaces. Research on youth travel documents that this segment—while low-spending per night—compensates through extended length of stay and high per-trip expenditure on food, local transport, and recreational activities.²

Alternative and niche accommodation formats—eco-lodges, heritage riads, agri-tourism farms, community homestays—represent the fastest-growing segment in experiential tourism markets. Their competitive advantage is the authenticity premium they can command: research consistently shows that tourists who perceive their accommodation as culturally embedded in the destination report higher overall satisfaction and greater willingness to recommend.³ For Algeria, this category is particularly strategically relevant given the country's exceptional cultural assets (Saharan architecture, Berber traditions, Ottoman-era urban fabric) that do not map naturally onto conventional hotel typologies.

reduction. *Journal of Travel Research*, 47(1), 94–103, p. 95.

¹Mitchell, J., & Ashley, C. (2010). *Tourism and Poverty Reduction: Pathways to Prosperity*. London: Earthscan/ODI, p. 44.

²Richards, G., & Wilson, J. (2003). *Today's Youth Travellers: Tomorrow's Global Nomads*. Amsterdam: International Student Travel Confederation, p. 28.

³Kim, Y. G., Eves, A., & Scarles, C. (2009). Building a model of local food consumption on trips and holidays. *International Journal of Hospitality Management*, 28(3), 423–431.

2.3.3 The Importance of Accommodation in Enhancing Tourist Experience

The relationship between accommodation quality and tourist satisfaction with the holiday as a whole has been well researched in hospitality and tourism literature. It goes without saying that satisfaction with accommodation directly influences the competitive advantage of the destination itself, and its role in shaping tourists' perceptions of a destination is critical. The accommodation experience is inseparable from other tourism experiences and integrated with perceptions tourists develop regarding the place. Poor quality of accommodation experience negatively influences the entire destination, while excellent experience can positively colour all subsequent perceptions and feelings associated with the destination visited. The asymmetry of evaluation process suggests that satisfactory quality of accommodation is crucial for destinations to create a positive reputation.¹

At the most fundamental level, accommodation satisfies physiological and safety needs that are preconditions for any other aspect of the tourist experience. Rest, hygiene, thermal comfort, and personal security are not differentiators—they are threshold requirements whose failure cannot be compensated by excellence elsewhere. The hospitality management literature frames this in terms of Herzberg's two-factor model: hygiene factors (cleanliness, safe water, working air conditioning, absence of pests) are dissatisfiers when absent but do not, by themselves, produce satisfaction when present; motivators (personalised service, aesthetic environments, memorable touches) generate positive affect only when the hygiene baseline is reliably met.² For Algeria's accommodation sector, which international visitors frequently report as falling short on basic hygiene and maintenance standards, this hierarchy implies a clear investment priority: no amount of distinctive architecture or cultural program-

¹Pizam, A., & Ellis, T. (1999). Customer satisfaction and its measurement in hospitality enterprises. *International Journal of Contemporary Hospitality Management*, 11(7), 326–339.

Türkay, O. (2015). Setting a research agenda for accommodation management. *International Journal of Contemporary Hospitality Management*, 27(3), 386–402.

²Barsky, J., & Nash, L. (2003). Customer satisfaction: applying concepts to industry-wide measures. *Cornell Hotel and Restaurant Administration Quarterly*, 44(5–6), 173–183.

ming will compensate for unreliable hot water or poorly maintained bathrooms.

Beyond the threshold requirements of comfort and safety, accommodation increasingly functions as an experiential medium through which tourists encounter the destination's cultural identity. Architecture, interior design, food and service style, and staff cultural knowledge all communicate something about the place—or conspicuously fail to. The growth of experiential tourism, documented across multiple source markets, has elevated the value of accommodation that is legible as genuinely local: a Saharan ksar guesthouse, an Ottoman-era riad, or a mountain berber lodge conveys destination identity in ways that an internationally branded business hotel, however comfortable, cannot. This authenticity premium is now reflected in pricing power: boutique and heritage accommodation formats increasingly command higher average daily rates than comparably positioned branded properties, particularly in culturally distinctive destinations.¹

The human element in accommodation is structurally more pervasive than in most other tourism services. Unlike a guided tour or a restaurant meal—single bounded encounters with a defined beginning and end—accommodation involves repeated and varied staff-guest interactions across the entire length of stay: check-in, concierge consultations, housekeeping entries, restaurant service, maintenance responses, and check-out. Each of these encounters independently contributes to the accumulated quality assessment that shapes the guest's eventual rating and recommendation behaviour. Research on service encounter sequences shows that initial and final interactions carry disproportionate weight in memory—the well-documented peak-end rule—which is why front-desk check-in quality and check-out efficiency receive particular attention in hospitality training.²

Location is another criterion through which accommodation influences the travel experience. The location of a particular property in relation to the destination's major attractions, transport hubs, and services is directly determining the convenience

¹Richards, G., & Wilson, J. (2003). *Today's Youth Travellers: Tomorrow's Global Nomads*. Amsterdam: International Student Travel Confederation, p. 31.

²Pizam, A., & Ellis, T. (1999). Customer satisfaction and its measurement in hospitality enterprises. *International Journal of Contemporary Hospitality Management*, 11(7), 326–339, p. 331.

of navigation within the destination. Proximity to major attractions and services reduces the need for transfer costs and enables tourists to get around easier. A remote or rural location, however, creates the need to plan the travel process more carefully and limits the spontaneous accessibility of various attractions. Often, the spatial layout of accommodation facilities in particular destinations defines how tourism impacts a destination area. Geographic clustering of accommodation facilities may determine the economic effects of tourism in a destination region as well as create problems associated with over-tourism.

The increased relevance of online review systems has also made the quality of accommodation facilities important for destination management. Various online platforms such as TripAdvisor, Google Reviews, or Booking.com feature aggregated ratings based on the guest reviews that prospective visitors check out as one of the key sources of information about the destination. The average rating of an accommodation facility works as a continuous sign of quality both for that particular property and, in the cumulative way, for the destination itself. Poor quality of accommodation facilities may reduce tourist demand for a destination, irrespective of the destination's other strengths. At the same time, the presence of several well-rated accommodation facilities provides an effective tool for destination marketing and promotion.

2.4 Recreation Management and Tourism Services

2.4.1 Tourism Entertainment and Leisure Activities

While accommodation provides for comfort and transport enables movement, recreation and entertainment represent the main incentive that motivates travelers to visit a destination. Tourists want to enjoy themselves at the destination and the quality, variety, and management of the destination's recreational offering are critical to

making this happen. Thus, recreation and entertainment represent core components of the process of tourism value creation and are a crucial element of the operation of the tourism industry.

The spectrum of recreational activities available at a destination is broad and reflects the diversity of tourist motivations mapped by Cohen's typology and similar frameworks. For the purposes of this analysis, it is useful to group them not just by type but by their *infrastructure dependency* and their *authenticity premium*—two dimensions directly relevant to Algeria's strategic position. Cultural and heritage experiences (guided site visits, living-history performances, artisanal craft encounters) are relatively low in capital infrastructure requirements but high in human capital requirements: knowledgeable guides, trained interpreters, and conserved site management. Nature-based experiences (desert trekking, wildlife observation, scenic driving circuits, thermal bathing) require different infrastructure—tracked trails, safety protocols, site carrying-capacity management—but offer high authenticity premiums that support premium pricing. Sport and adventure activities (mountaineering, off-road driving, paragliding, water sports where coastal geography permits) require certified staff, safety equipment, and regulatory frameworks. Wellness and personal development formats (spa, culinary learning, language immersion) are among the fastest-growing segments globally and demand relatively modest capital investment relative to the margins they can sustain. The mix of recreational types available at a destination is therefore not merely a reflection of natural endowment but a product of deliberate investment, regulatory design, and human resource development decisions.¹

Organisationally, the provision of tourism recreation engages a variety of providers operating at various levels of scale and related differently to the commercial operation of tourism as an industry. Big-scale recreational facilities, such as theme parks, large-scale cultural institutions, stadiums for sports events, and large-scale resorts with embedded recreational facilities are mostly provided

¹Page, S., & Connell, J. (2020). *Tourism: A Modern Synthesis*. London: Cengage, pp. 158–163.

by specialized private companies. Alternatively, they can be provided by public bodies (national museums and similar institutions). The mid-scale facilities such as adventure tourism companies, diving centres, tour operators, and performance art organisations represent private companies as well. Small-scale providers comprise artisans running craft workshops, local festival organisers, local guides, community-based tourism providers offering local lifestyle experiences.

Management of the broad variety of recreation providers in destination constitutes a serious organisational challenge for a destination organisation. Without proper coordination, the recreational programme of the destination might be inconsistent, fragmented, and not suitable for the needs of particular tourist segments. For example, there may be events overlapping in their target audiences; there may be gaps in the provision of particular activities during high-tourist seasons; quality standards may significantly differ among different providers in the same recreation segment. To achieve maximum quality and completeness of the recreation offering of the destination, a destination management organization must coordinate the process through developing shared events calendar, setting minimum quality standards for commercial providers of recreation, and incorporating the recreational offer into the marketing of destination in general.

One of the critical operational challenges related to the recreation is the problem of seasonality. A large number of recreational activities is seasonal in nature—ski resort operations stop in summer, beach and water sport activities stop in winter, various festivals usually happen once a year. Beyond this, due to the seasonal distribution of visitor flows caused by the seasonal schedules of school holidays, climate conditions, and the itinerary planning of tour operators, seasonality of tourism and recreational activities are mutually amplifying factors. Ensuring consistent year-long recreation programme requires creative product development, investment in weather-independent facilities and promotion of off-season periods to traveler segments whose holiday plans are not bound to school holiday period (retirees, couples

without children, business travelers).¹

The requirements related to providing various recreational activities vary considerably. Some types of recreational activities, including those targeted at general audience (walk tours, visits to museums, easy cycling, beach relax), usually involve facility maintenance and management of visitor flows, while complex activities like mountaineering, diving in open sea, paragliding, white-water kayaking require a highly specialized staff (certified instructors), appropriate safety equipment and regular maintenance thereof, effective risk communication, mandatory briefings and emergency procedures. The regulatory regime regarding adventure and risky recreational activities differs by jurisdictions. However, the effectiveness of this regime directly determines both the safety performance of the sector and legal liability of operators.

2.4.2 Supporting Tourism Services

Besides the central recreational activities that often make the core motivation for tourists' visits, there needs to be a wide range of auxiliary tourism services that will make the tourist experience more manageable, informative, and comfortable. While the auxiliary tourism services do not get as much attention in research literature and in the marketing practices of destinations, they still play a significant role in determining the level of overall tourist satisfaction and contributing to the general image of the destination in question.

Professional guides and interpretive services are perhaps the most central example of this kind of auxiliary tourism support. What professional guides offer is something that cannot be replaced by any written or virtual content: a live, personalized narrative of the place and its culture, responsiveness to tourists' questions, and a genuine passion for the topic. Professional guides require extensive expertise, language skills, and cultural sensitivity. There are specialized guide training

¹Butler, R. W. (1994). Seasonality in tourism: issues and implications. In T. Baum & S. Lundtorp (Eds.), *Seasonality in Tourism* (pp. 5–22). Oxford: Pergamon.

programmes, though their success varies from place to place.¹

Tourist information services that operate via tourist information centres, websites or mobile applications serve as orientation tools enabling visitors to navigate the destination effectively, make the best decisions concerning activities and services, and handle the problems that may arise. They are critical components of destination accessibility, especially if a visitor visits the destination for the first time and without any pre-arranged programmes.

Retail and shopping services that include the sale of locally made goods, handicrafts, local foods and artefacts serve as both economic means of generating revenue and tourism experience enhancers. For many tourists, shopping local handicrafts is a cultural experience in itself that also serves as support for local artisans and food producers. From this standpoint, it represents an excellent opportunity for local economic development; unfortunately, the benefits can only be realized if the items sold are genuinely locally produced and represent a true link with the place's culture.

Finally, the practical support infrastructure including currency exchange points and ATMs, mobile internet connectivity, health facilities, and accessible public transportation ensures that tourists are safe and capable of moving around freely. It is something that goes unnoticed until it fails and leaves a lasting negative impression. Destinations that offer reliable, accessible and multilingual support infrastructure create a positive environment that helps maintain the quality of the recreational offer.

2.4.3 The Contribution of Recreational Activities to Destination Attractiveness

The crucial role of a well-developed and properly managed recreational offer in making a destination competitive and attractive has increasingly attracted interest

¹Weiler, B., & Black, R. (2015). Tour guiding research: insights, issues and implications. Bristol: Channel View, cited in the roles of the indigenous tour guide. *Journal of Tourism Studies*, 12(2), 32–39.

among both researchers and practitioners in tourism management. Recreational activities influence destination attractiveness through several channels, and their interaction often leads to synergy effects.

First, recreational activities and events serve as a motivator. That is, recreational activities are primary travel motivations by themselves. For example, a famous music festival, a sporting event, a distinguished cultural institution, a renowned wine region, or a destination offering world-class conditions for adventure tourism are all enough reasons for some people to decide to travel to certain destinations. Once a recreational offer is good enough to turn a destination into an attractive location for a particular type of tourism, it becomes a part of the destination's image and branding, creating a unique position among its competitors that is hard to duplicate.¹

Second, recreational offer allows destinations to differentiate from other destinations having comparable natural and/or cultural resources but lacking a proper recreational offer. Two competing beach resorts that are equal from the standpoint of climate and natural amenities may be perceived quite differently by tourists if one of them provides more opportunities than another for engaging in various activities, such as water sports, boat trips, cultural tours, or evening entertainment. This means that a properly designed recreational programme makes it possible for tourists to enjoy more interesting options at various price levels and according to their interests.

Third, a rich recreational offer is essential for managing tourism seasonality. Indoor activities, such as cultural events, gastronomy fests, and wellness activities, as well as seasonal activities related to the climate (skiing during winter, water sports during summer) helps manage tourism seasonality and extend the period during which a particular destination can attract visitors. Season extension has some economic sense: first, it diversifies income flow, thus reducing the dependence on a relatively short peak season. Second, it allows a destination to maintain continuous

¹Ritchie, J. R. B., & Crouch, G. I. (2003). *The Competitive Destination: A Sustainable Tourism Perspective*. Wallingford: CABI.

employment for staff members, thereby lowering operating costs per capacity unit because of higher load factors during the extended periods.

Finally, recreation contributes to the geographical distribution of tourism. Recreation activities that take place at different locations within the region (hiking in mountain areas, working at art workshops in rural areas, exploring historical sites in secondary cities, and visiting marine preserves near beaches) make it more likely for tourists to leave the urban or coastal tourism zones and explore the rest of the destination. First, this approach improves the efficiency of the destination's infrastructure, spreading the demand among all available options. Second, tourists will receive a more diversified experience of the destination's natural and cultural wealth. Finally, it helps distribute tourism-related benefits across all communities of a region rather than concentrating them in just a few places.

2.5 Food and Catering Services in Tourism

2.5.1 The Role of Restaurants in Tourism Activity

Food consumption is the one tourist behaviour that is simultaneously universal, unavoidable, and culturally saturated—every tourist eats, every meal is an encounter with the host society, and the cumulative quality of those encounters shapes destination perception in ways that no marketing campaign can fully replicate. This is why the academic treatment of food in tourism has evolved substantially over the past two decades, shifting from treating restaurants as a logistical support function to recognising gastronomy as a primary attraction in its own right. Quan and Wang's foundational framework captures this duality precisely: food functions both as a *peak experience*—the primary motivator for visiting a destination, as in dedicated gastronomic tourism—and as a *supporting experience* that, regardless of its centrality, consistently shapes the tourist's holistic evaluation of the destination.¹

The economic weight of food services in tourism is substantial. UNWTO data

¹Quan, S., & Wang, N. (2004). Towards a structural model of the tourist experience: an illustration from food experiences in tourism. *Tourism Management*, 25(3), 297–305, p. 298.

indicate that food and beverage expenditure typically accounts for between 15 and 25 per cent of total tourist spending during international trips—a share comparable to that of accommodation for shorter stays.¹ Applied to pre-pandemic total international tourism receipts of approximately US\$1.5 trillion (2019),² this implies a food and beverage market of the order of USD 225–375 billion annually in international tourism alone—before domestic tourism, which the WTTC estimates represents roughly 71 per cent of total tourism activity by value, is included. For Algeria, these figures are directly relevant: a destination that fails to develop a competitive, diverse, and locally sourced restaurant sector foregoes a substantial share of tourist expenditure and the backward linkages it would generate for domestic agriculture and food processing.

The employment implications of restaurant development are comparably significant. Food service is highly labour-intensive relative to capital and generates jobs across a wide skill range—from entry-level kitchen workers who can be trained in-house to head chefs and sommeliers whose formation requires years of structured education. In urban tourism destinations, the restaurant sector frequently ranks among the top three private-sector employers, and the informality that characterises much of the sector in developing economies can, with appropriate policy support, be progressively formalised into stable, registered employment with social protection. This trajectory is part of what makes food service investment an important vector of inclusive tourism development.

A further dimension is the emergence of organised food tourism experiences—cooking classes, market visits, producer tours, and culinary trails—as mainstream components of the destination tourism offer. These formats are particularly valuable because they extend tourist engagement beyond passive consumption toward active learning and cultural exchange, producing higher experiential satisfaction scores and stronger word-of-mouth promotion than passive dining alone.³

¹UNWTO. (2019). *International Tourism Highlights, 2019 Edition*. Madrid: UNWTO.

²WTTC. (2019). *Travel & Tourism Economic Impact 2019: World*. London: WTTC.

³Kim, Y. G., Eves, A., & Scarles, C. (2009). Building a model of local food consumption on trips and holidays: a grounded theory approach. *International Journal of Hospitality Management*,

2.5.2 Catering Services as a Tourism Support Sector

Beyond the restaurant encounter, tourists consume food and beverages across a much wider range of settings that together constitute the *catering subsector* of tourism food service. In-flight meal provision, hotel breakfast and room service, event and conference catering, food at attractions and recreation facilities, and on-board cruise catering all share the defining characteristic that the consumption context is controlled by the tourism operator rather than chosen freely by the tourist. This distinction has important quality management implications: the tourist cannot substitute an unsatisfactory catering experience the way they might choose a different restaurant, so operational standards failures—contamination, temperature control failures, inadequate dietary accommodation—have more severe and less recoverable consequences for guest satisfaction and destination reputation.

Within the hotel sector specifically, food and beverage operations occupy a structurally significant position in the revenue architecture. For properties with full-service dining, the F&B department can account for between 25 and 40 per cent of total revenue.¹ This revenue share is accompanied by cost complexity: food service requires specialised staff, compliance with hygiene regulations, perishable inventory management, and coordination between kitchen and front-of-house that other hotel departments do not face. For this reason, many full-service hotels choose to outsource their restaurant operations to specialist operators under concession arrangements, trading revenue share for reduced operational risk—a model common in European and North African markets.

The developmental dimension of catering deserves particular attention in the Algerian context. The backward linkages generated by hotel and restaurant food procurement are among the most locally concentrated of any tourism sector: fresh produce, dairy, meat, and bakery products can all be sourced domestically provided that supply chains are reliable and quality-assured. Where procurement is instead

28(3), 423–431.

¹Ivanov, S., & Zhechev, V. (2012). Hotel revenue management: a critical literature review. *Tourism*, 60(2), 175–197, p. 183.

dominated by imported goods—a pattern common in destinations where domestic supply chains are fragmented or inconsistent—tourist food expenditure becomes a net drain on the current account rather than a stimulus to domestic agriculture. Algeria’s agricultural sector, which benefits from diverse Mediterranean and Saharan growing conditions, represents an underexploited opportunity to capture this expenditure domestically, provided that hotel and restaurant procurement policies are aligned with national food production development strategies.¹

2.5.3 The Influence of Food Services on Tourist Satisfaction

The relationship between food experience and overall destination satisfaction is among the most robustly documented findings in tourism research. Because tourists eat at minimum two or three times per day, food encounters accumulate into a high-frequency series of interactions with the host society—each one capable of reinforcing or undermining the destination’s overall image. Kim, Eves, and Scarles’ grounded theory model identifies food consumption motivations ranging from novelty-seeking and cultural learning to health consciousness and symbolic meaning, and demonstrates that when these motivations are met, food satisfaction contributes independently to destination satisfaction above and beyond accommodation or attraction quality.²

The mechanism through which food shapes destination evaluation differs depending on tourist type and trip purpose. For gastronomic tourists—those for whom cuisine is a primary travel motivation—the food experience functions as the nucleus around which other activities are organised: destination choice, itinerary planning, and trip timing are all influenced by the perceived quality of local food culture.³ For the majority of tourists for whom food is a supporting rather than peak activity, the

¹Mitchell, J., & Ashley, C. (2010). *Tourism and Poverty Reduction: Pathways to Prosperity*. London: Earthscan/ODI, pp. 67–70.

²Kim, Y. G., Eves, A., & Scarles, C. (2009). Building a model of local food consumption on trips and holidays: a grounded theory approach. *International Journal of Hospitality Management*, 28(3), 423–431, p. 428.

³Quan, S., & Wang, N. (2004). Towards a structural model of the tourist experience. *Tourism Management*, 25(3), 297–305.

mechanism is more subtle but no less consequential: a consistent sequence of pleasant dining experiences creates a diffuse positive affect that colours memories of the entire trip, whereas a single serious negative experience—a food poisoning incident, an overpriced and inauthentic tourist-trap meal—can retroactively contaminate positive memories of otherwise successful visits.

Authenticity is the critical variable mediating food satisfaction for culturally motivated tourists. Cohen and Avieli's comparative analysis documents a persistent paradox: local food that is completely authentic in preparation may be inaccessible to tourists because of unfamiliar flavours, textures, or presentation; food modified for tourist palates loses the cultural credibility that motivated the tourist's interest in the first place.¹ The most successful restaurant operators navigate this paradox not by diluting authenticity but by *contextualising* it—providing narrative, explanation, and a welcoming environment that allows tourists to engage with unfamiliar culinary traditions at their own pace. For Algeria's restaurants, where Amazigh, Arab, and Mediterranean culinary traditions offer genuinely distinctive gastronomic assets, this navigation between authenticity and accessibility represents a significant competitive opportunity that currently remains largely underdeveloped.

Food safety operates as both a regulatory obligation and a reputation asset in tourism contexts. Its strategic significance is asymmetric: consistent safety compliance is invisible to tourists and generates no competitive advantage, but a single serious incident—food poisoning that affects multiple guests, a contamination event linked to a specific restaurant—can produce reputational damage disproportionate to the physical harm caused, particularly given the speed at which negative experiences are amplified through user-generated review platforms.² For destination authorities, this asymmetry argues for proactive investment in food safety enforcement and restaurant inspection regimes, not as bureaucratic compliance but as a component of destination risk management.

¹Cohen, E., & Avieli, N. (2004). Food in tourism: attraction and impediment. *Annals of Tourism Research*, 31(4), 755–778, p. 762.

²Kim, Y. G., Eves, A., & Scarles, C. (2009). *International Journal of Hospitality Management*, 28(3), 423–431, p. 429.

The broader digitalisation of food experience evaluation has transformed the competitive dynamics of the restaurant sector within tourism destinations. Aggregated ratings on TripAdvisor, Google Maps, and Booking.com function as a continuously updated quality signal that prospective tourists consult during trip planning—often before any official destination marketing material is encountered. A destination's average restaurant rating across these platforms has become, in effect, a component of its global competitive positioning in food tourism segments. This creates a compounding dynamic that rewards quality improvement: strong ratings attract more visitors, higher volumes generate more reviews, and a larger review base provides more reliable quality signals to future tourists. Conversely, destinations with low or sparse ratings face a structural visibility disadvantage that marketing investment alone cannot easily overcome. For Algeria, where online restaurant review coverage remains thin relative to competing Mediterranean destinations, building review volume and quality simultaneously is a precondition for competing in experiential food tourism markets.

2.6 Tourism Transport Systems

2.6.1 Air Transport in Tourism

The provision of transportation is the key operational aspect that makes tourism feasible in terms of the ability to get to the destination from the tourists' point of origin. While there are various transportation modes utilized in tourism activities, air transport remains the crucial one that has changed greatly the scope of tourism activities due to the opportunity it provides. Today, air transport is still the main mode of international long-haul transport and gains popularity in medium-haul operations.

Transformation of international tourism through air transport started to take place many years ago but has accelerated significantly since the 1960s with the invention of wide-body jets that allowed transporting larger amounts of passengers

over bigger distances at a lower cost than previous-generation jets could do. Furthermore, the process of deregulation of aviation markets in the United States in the late 1970s and the same process in Europe in the 1990s removed barriers protecting the domestic airlines from competing prices and network strategies. Consequently, the emergence of new business models, including, first of all, low-cost carriers that provided flights at much lower rates, opened up new opportunities for travelers.¹ From a tourist perspective, it was possible to access previously difficult-to-reach destinations and to make traveling more popular due to a considerable drop in expenses.

Based on data from the UNWTO from 2019, it can be seen that 58% of all international tourists who traveled abroad did so using air transport, 37% by road, 4% by water, and just 2% by rail.² However, there is a clear regional variance, with a higher share taken by air transportation in regions with significant islands and intercontinental distances—Pacific, Caribbean, sub-Saharan Africa—compared to densely connected continental regions—western Europe—where more of the market is taken up by road and rail. Regardless, the dominance of air transportation in international tourism means that decision-making processes in the sector have a primary effect on tourism industry performance at destination level.

Operationally speaking, the contribution of air transport in tourism can be identified through three key aspects: network connectivity, capacity/price decisions, and service quality. Network connectivity defines the origin and destination points that are offered by airlines flying to or from the destination under consideration, the frequency of those flights, and quality of the connections available in case a passenger does not fly direct. Many destinations are more accessible depending on the reach of the airline network. A destination that offers direct flights to fifteen countries attracts a different pool—usually a bigger one—of tourists compared to destinations requiring a connection via a remote hub airport. The discipline known as route

¹Dobruszkes, F. (2013). The geography of European low-cost airline networks: a contemporary analysis. *Journal of Transport Geography*, 28, 75–88, p. 76.

²UNWTO. (2020). *International Tourism Highlights, 2020 Edition*. Madrid: UNWTO.

development—a process involving airports and destination tourism authorities—has evolved into a very complicated exercise involving traffic analyses, negotiations, and risk-mitigating schemes that aim at reducing exposure during the period prior to reaching break-even on a new route.¹

Capacity and price decisions in airlines directly influence seasonality and the price levels of tourism at destination level. Airlines manage their capacity seasonally, allocating more capacity to leisure destinations during the summer period and to business routes throughout the whole year. Also, pricing decisions are managed through sophisticated dynamic pricing models based on real-time yield management, which adjusts prices in real time depending on booking patterns, inventory availability, and competitive pricing. The result is that a ticket to the same destination could fluctuate significantly during peak and low seasons, as well as among early and late bookers, having strong implications for the type and purchasing power of tourists who arrive at a destination.

In air transportation, service quality ranges from pre-flight booking and check-in, in-flight experience (seats, cleanliness of cabin, food and drink service, entertainment, and in-flight service from flight attendants), and post-flight luggage handling and arrivals. For many tourists, an outbound flight becomes the first actual contact with their destination of choice and, therefore, leaves a positive or negative first impression, setting the mood for the rest of their journey. Airlines that actively promote their national identity through design and food, and service style can play an active role in branding a destination even before tourists touch down. These airlines are often referred to as “flying ambassadors” of their destinations.

The environmental sustainability of aviation is becoming a growing concern for the tourism industry because of the significant role that this activity plays in global CO₂ emissions. According to research, global aviation contributes 2.5% of global CO₂ emissions, while the overall climate impact—that includes non-CO₂ effects, such

¹Forsyth, P., King, J., & Rodolfo, C. L. (2006). Open skies in ASEAN. *Journal of Air Transport Management*, 12(3), 143–152.

as contrails—is much greater.¹ As sustainable tourism becomes the focus of the strategy for many tourism organisations, it is important to note that carbon emission levels remain extremely high in the air transport sector, and sustainable aviation fuel, improved aircraft efficiency, and demand management techniques—carbon offsetting and other measures aimed at influencing behaviour—remain insufficient.

2.6.2 Land Transport in Tourism

This section will cover the entire spectrum of surface modes used by tourists in their travels, from cars to buses to high-speed trains and metros to bicycles. Land transport is used in tourism for several purposes—to facilitate travel to tourist destinations, to provide mobility within destinations, and in some cases as a tourism experience itself as part of a scenic drive.

The private car remains the most popular mode of transport among tourists in domestic tourism across high-income economies. This can be explained by the advantages it provides in terms of comfort, flexibility, luggage space, and the ability to transport children or mobility-impaired family members that no public transport system can fully replicate. Domestic tourism generates a huge network of roadside amenities, such as gas stations with cafes and restaurants, motorways, and service areas, restaurants and guesthouses along routes, camping and camping facilities, and the network of roads that allow access to less easily accessible parts of the territory. Therefore, high-quality road network matters greatly for determining tourism potential of certain areas, and major investments in road infrastructure throughout history often coincide with increases in domestic tourism to new destinations.

Coach and bus transport are essential in tourism for different types of tourism groups—school trips, cultural and heritage tours, senior travellers’ pilgrimages, etc. Scheduled intercity coaches are used primarily by budget travellers and backpackers as the most affordable public transport option. City sightseeing buses—those familiar double-decker buses offering a guided city tour—become an integral part of the

¹Lee, D. S., et al. (2021). The contribution of global aviation to anthropogenic climate forcing for 2000 to 2018. *Atmospheric Environment*, 244, 117834.

tourism experience in major cities, especially for tourists visiting a destination for the first time. The organisation of coach tourism requires coordination between the tourism and the transport sector of local municipalities.

The extent to which rail transport contributes to the tourism industry varies greatly, dependent on the density and quality of rail networking, with trains being a competitive alternative mode of travel to private road vehicles and aircraft for intercity tourism journeys primarily in countries where rail networks are dense and train services are frequent—most notably western Europe, Japan, and parts of East Asia. In contrast to air travel, trains offer a direct city-to-city connection without the added cost of airport logistics, generally more reliable journeys in adverse weather conditions, and environmentally preferable per-passenger carbon emissions in comparison to both road and air alternatives.¹ High-speed rail in particular is a major contributor to the catchment area of many tourism destinations, with a railway journey of two hundred kilometers completed in less than an hour bringing a destination within the reach of day-trips and breaks for major urban populations that would previously have found it out of reach.

Scenic and heritage railways are examples of tourism products in which the journey is the attraction rather than simply the transport means. The Glacier Express, the Bernina Railway, the Jacobite Steam Train in Scotland, along with a number of narrow-gauge mountain railways across various countries represent tourist attractions in themselves, contributing significantly to tourism economies in regions that might not otherwise attract tourists through such routes.

Urban public transport systems such as metros, trams, buses, and light-rail transit systems play an important role in tourist mobility of tourists within destinations, impacting the ease of access to attractions and other facilities and allowing tourists to make use of urban space without the need to rent cars or hail cabs. The effectiveness of a tourist's ability to navigate urban space through public transport is determined by the availability of multi-language information and communication

¹Albalade, D., & Bel, G. (2010). Tourism and urban public transport: holding demand pressure under supply constraints. *Tourism Management*, 31(3), 425–433.

infrastructure on transport networks, the convenience of ticketing, and reliability and frequency of services. The cities that have invested in these features of their urban transport networks create more tourism-friendly environments and decrease environmental pressures from the presence of taxi and private vehicles.

2.6.3 Maritime Transport in Tourism

Maritime transport is all modes of travel by sea or waterways for tourism purposes, including everything from ferry services for short-distance crossing to oceanic cruise voyages that are the entire tourism experience. The importance of maritime transport in tourism depends on destination geography: island and archipelagic destinations rely heavily on maritime transport as part of their tourism systems while continental destinations do not, but the significance of maritime tourism exceeds its share among global international arrivals (around 4%, according to UNWTO data) due to its disproportionate geographic economic footprint.¹

Ferry services and short-sea passenger shipping constitute the most essentially critical aspect of maritime transport in tourism. In island and archipelago destinations, ferry services are the primary or even only way of travelling between the islands, as well as the main means of connecting the island to the rest of the destination. The efficiency, reliability, frequency, and capacity of ferry routes determine the feasibility of tourism itineraries and day-trip opportunities; an inadequately developed or poorly operated ferry line makes an island unreachable and unattractive in terms of tourism development regardless of the attractiveness of the island's natural and cultural features. Ferry operators in tourism-dependent island destinations operate under complex business models: they need to maintain capacity for peak demand, incur the costs associated with vessel ownership and crew wages during off-peak seasons, and provide transportation for low-demand routes where ferry services may not be financially sustainable.

The cruise segment is the largest and fastest-growing part of maritime tourism,

¹United Nations World Tourism Organization (UNWTO). (2020). International Maritime Tourism 2019. Available at <https://doi.org/10.18111/wtob.93>

as well as one of the most controversial in terms of its environmental and social impacts. Over the last three decades, the cruise industry has grown from a niche tourism sector serving mainly affluent travelers into a global mass-market business that served around 29.7 million passengers in 2019.¹ Contemporary cruise liners are technological marvels, capable of accommodating thousands of passengers along with crews of over a thousand people, equipped with the full complement of facilities typically provided by resort hotels: multiple restaurants and bars, entertainment and sports facilities, spas, and retail outlets. Onboard, passengers experience the full vacation.

Destination economies' economic relations with cruise tourism are complex and often unequal. Cruise passengers who sleep onboard rather than ashore do not spend money on accommodation, and their expenses in ports are mostly confined to excursions, onshore meals and drinks, and souvenir shopping. Numerous studies into the economic significance of cruise ports have shown that cruise ship passengers spend far less money ashore compared to overnight visitors, although the collective impact of a big cruise call may still be economically valuable to smaller islands with limited tourism infrastructure.² Environmental issues related to cruising are diverse: air and water pollution, solid and liquid waste disposal, as well as the physical and social pressures experienced by small ports by several thousand visitors within just a few hours. International regulations addressing these problems include increasingly strict environmental controls implemented by the International Maritime Organization (IMO).

River and small ship cruises, on the other hand, represent a particular market segment, characterised by relatively smaller vessel sizes, a more personal guest experience, and destinations to places not accessible to ocean cruise ships. The smaller size of the ships means less pressure on both the environment and society compared to mass ocean cruises, while a more culturally motivated clientele and a relatively

¹Cruise Lines International Association (CLIA). (2020). *2020 State of the Cruise Industry Outlook*. Washington DC: CLIA.

²Brida, J. G., & Zapata, S. (2010). Cruise tourism: economic, socio-cultural and environmental impacts. *International Journal of Leisure and Tourism Marketing*, 1(3), 205–226, 393–415.

higher income level position these forms of tourism as commercially viable.

Maritime transport development and tourism require an effective approach in several areas. In addition to developing the ports themselves and building berths with adequate depth, as well as gangways for safe disembarkation, it is necessary to adapt port infrastructure to accommodate tourism needs — build terminal facilities with customs and security control, provide opportunities for onward transportation. What is more, environmental requirements for maritime vessels need to be tightened, reducing their ecological footprint. Regulations governing the conduct of ships in territorial waters and safety at sea should be developed. Finally, relations in the tourism industry involving cruises and ferries, port authorities, local authorities, and destination tourism organisations should be arranged in such a way as to guarantee all partners a share of the revenue.

Chapter Conclusion

Thus, five pillars of the tourism industry have been considered — tour organisation and travel agencies; hotel management and tourist accommodation; recreation management and tourism services; food and catering services; and tourism transport systems — in which a consistent conclusion emerged. The structure, functioning, managerial dimensions, and developmental aspects of each pillar of the tourism industry were considered and traced the traditional foundations and current forces influencing their development, among which digital transformation, the necessity for sustainable practices, change in consumers' preferences, and increased competition play a key role.

A number of issues unite all five pillars considered. The first is the interaction between them. Tourist transport, for example, without accommodation and its quality is worthless. Accommodation, even luxurious, without opportunities to relax, as well as good food, cannot keep people in a place for long enough. Tour organisers also will not be able to work without suppliers of high-quality services, since only then they will be able to create attractive offers. In other words, the tourism industry

operates as one unified entity, and the effectiveness of its functioning depends on the quality of its elements.

Another important aspect that unites all five pillars under consideration is human capital. People who are competent in their field, have positive attitudes towards customers, and understand and respect the culture are required to transform technical infrastructures into quality services. In this regard, investments in education, professional growth, and improvement of work conditions are essential for providing high quality of service.

Thirdly, digital transformation has affected the industry significantly. It has led to a rethinking of the distribution of products and their pricing, as well as the improvement of reputation management practices and operational efficiency in general.

Fourthly, a significant effect has been made on the tourism industry due to the need to reduce environmental footprints and distribute the resulting economic gains equitably within the community of the destination.

Pillars of the tourism industry and their connection through certain aspects form the practical basis of tourism. For tourism performance in terms of indicators, it is not enough to have attractions — the quality of hospitality and accommodation, transport links, recreational services, and quality meals play a key role. This idea will be important for the assessment of the current state of Algeria's tourism industry discussed in the next chapter.

CHAPTER 3

Comparative Analysis of the Tourism Industry in Algeria and Morocco

Introduction

Having provided the conceptual background to the topic studied in the previous two chapters, the time came to apply it to the case at hand. The first of the chapters established the theoretical foundations of tourism and the industry; the second described the functioning, managerial dimensions, and development of the industry by examining its five operational pillars. This chapter will apply the knowledge accumulated during this process to describe how the five pillars of the industry are formed in Algeria and Morocco, and how much this affects the countries' tourism performance in the period 2010–2023.

The methodological approach in this case is descriptive-analytical and comparative, based on data from internationally recognised secondary sources (UNWTO, World Bank, OECD, WTTC, Statista) and statistics, reports, and reviews of the Ministries of Tourism of Morocco and Algeria and related academic literature, including Chettabi and Moali's comparative analysis of Algeria's tourism sector in the context of economic diversification strategies.¹ Such an approach is suitable for answering the research questions. A study based on primary data obtained through surveys or interviews would be valuable for analysing tourists' experience and expenditure patterns, but inadequate to compare the performance of pillars across

¹Chettabi, K., & Moali, M. (2025). Tourism in Algeria: Potential, reality and prospects in light of the trend towards economic diversification policy. *Journal of Wisdom for Research and Studies*, 5(6), 256–272.

countries. Therefore, using secondary data allows obtaining harmonised international indicators in addition to domestic figures and, thereby, to make a comparable cross-country assessment. In cases when statistics are missing — and this happens more often for Algeria than for Morocco — the lack of relevant data will also be reflected in the analysis.

In relation to the contributions to the existing body of knowledge, the present chapter contributes to the work of Meskin et al. (2015) and Tarfaya (2022) on the tourism sector in Algeria in two ways. First, it uses the novel approach of a comparative analysis of five pillars of tourism to diagnose the nature of the problem in greater detail. Second, it relies on updated statistics covering the period up to 2023–2024, including Morocco’s post-pandemic boom in the number of arrivals amounting to 17.4 million tourists.

This chapter will be divided into three sections. The first part is devoted to examining the tourism sector in Algeria. The second part analyses Morocco using the same approach. Finally, this paper proceeds to perform a comparative analysis of both countries’ tourism pillars and performance, and ends with an assessment of findings in light of the research hypotheses formulated in the general introduction, testing the null hypothesis against the alternative hypothesis and its sub-hypotheses.

3.1 The Tourism Sector in Algeria

General Context

Algeria is the largest country in Africa and the Arab World, spanning over 2.38 million square kilometers and hosting some 45 million inhabitants as of 2022.¹ The economy of Algeria is characterized by hydrocarbon dominance; indeed, this sector represents the major source of export revenues and government income, a structural characteristic that the different successive governments tried, yet were not too successful, to alleviate via economic diversification policies. Tourism is explicitly

¹Office National des Statistiques (ONS), *Annuaire Statistique de l’Algérie*, Algiers: ONS, 2022.

named as one of the top alternative sectors in this respect, owing to the wealth of natural and cultural resources of Algeria. Geographically, Algeria borders Tunisia and Libya on its eastern side, Morocco and Mauritania on the western side, Mali and Niger in the South, while facing the Mediterranean Sea in the North — making this geography an advantage from a connectivity perspective towards key European source markets. To understand how such potential is exploited by means of the tourism pillars will be the focus of the subsequent parts.

3.1.1 Tourism Resources in Algeria

As far as its tourism resource endowment is concerned, Algeria can be said to have five major product groups. Geographically, Algeria stretches from a 1,600 kilometer-long coast in the northern part of the country to the Saharan regions located southward in an area that includes plateaux, forested mountains, palm oases, ergs, and reg plains.¹ Accordingly, the geography of the country gives way for the practice of coastal and sea bathing tourism in the northern part, mountain and ecotourism in the Atlas and Kabylie, Saharan and desert tourism in the southern region, as well as thermal and wellness tourism among the dozen of mineral springs in the country.²

On the cultural front, Algeria can boast of a very rich historical and civilizational heritage dating back to different civilizational stages including the Phoenician, Roman, Vandal, Byzantine, Arab-Muslim, Ottoman, and colonial era. This cultural heritage comes in different forms including archaeological sites, historic cities, mosques, ksour, zaouias, palaces, as well as unique city layouts such as the Casbah in Algiers and M'zab Valley.³ Among those assets, some have been declared UNESCO World Heritage sites, namely the Casbah of Algiers, Timgad, Djemila, Tipasa, the M'zab Valley, the Tassili n'Ajjer plateau, and the Ahaggar cultural

¹Chettabi, K., & Moali, M. (2025). Tourism in Algeria. *Journal of Wisdom for Research and Studies*, 5(6), 258–259.

²Ibid. The authors name coastal, Saharan, thermal, climatic, and urban tourism as the primary product types that characterize Algeria's tourism offer.

³Meskin, A. H., Derwish, S., & Zarrou, S. (2015). The tourism industry in Algeria: Its assets and sources of competitiveness. *Revue des Sciences Économiques et de Gestion*, 15, 1–22.

landscape.¹ In addition, the list of Algeria's rich intangible cultural heritage includes regional musical heritage, religious and cultural festivals, handicrafts, and culinary specialties.

Theoretically, all the aforementioned resources represent the fundamental pillars of tourism development discussed in Chapter One. From an empirical point of view, however, the question raised is whether those assets have been efficiently converted into a competitive offer by means of the five pillars reviewed in Chapter Two: (1) tour organization and travel agencies; (2) hotels management and tourist accommodation; (3) recreation management and tourism services; (4) food and catering services; and (5) tourism transport systems. According to literature, the answer seems negative as many assets in Algeria remain under-exploited or poorly accessible, thereby limiting the flows realized through this offer.²

3.1.2 Tourism Infrastructure and Services

The following subsections assess Algeria's five operational tourism pillars as established in Chapter Two: accommodation, tour organisation and travel agencies, recreation and ancillary services, food and catering, and transport. Each is evaluated against the theoretical framework developed in Chapters One and Two, drawing on available statistical data and published research.

3.1.2.1 Tour Organisation and Travel Agencies

Quantitatively speaking, the number of tour and travel agencies in Algeria is remarkable. According to a recent study of digital tourism in the country, the number of licensed travel agencies reached 4,999 as of the end of 2023 after being boosted by government actions adding 507 newly licensed agencies, including 404 parent agencies and 103 branches, in 2023 alone.³ According to press reports citing the

¹UNESCO World Heritage Centre. (2026a). Algeria. <https://whc.unesco.org/en/states-parties/dz>

²Oudaifia, L. (2020). *Tourism in Algeria between the reality and the challenges* (Master's thesis, University of Annaba).

³Boukhelifa, M. (2023). Digital tourism in Algeria as a case study. *Journal of Economic and Management Studies*.

Ministry of Tourism, the number has been further boosted by the addition of another 571 travel agencies in 2024, raising the total count to 5,570.¹

Table 3.1 presents the number of licensed travel agencies in Algeria across selected years.

Table 3.1. Evolution of licensed travel agencies in Algeria (selected years)

Year	Licensed agencies (count)
2023	4,999
2024	5,570

Sources: Boukhelifa (2023) for the 2023 figure, noting that 507 new agencies were licensed in 2023 alone; Algeria Invest, “Tourism in Algeria: 10,000 additional beds by 2026,” November 2025, citing Ministry of Tourism data, for the 2024 figure. No comparable baseline figure for earlier years is available in published sources; the growth trend is described qualitatively by Boukhelifa (2023) as reflecting sustained liberalisation of agency licensing under successive tourism plans.

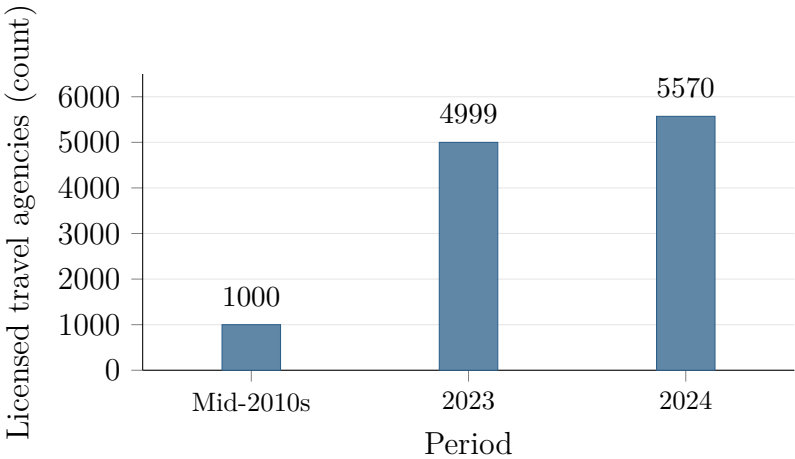


Figure 3.1. Growth of Licensed Travel Agencies in Algeria (selected years)

Source: Boukhelifa (2023); Algeria Invest (2025) citing Ministry of Tourism data. Mid-2010s value is approximate.

Thus, the picture looks very positive from a purely quantitative standpoint. On the other hand, qualitative data suggest that a majority of Algerian travel agencies are focused on domestic ticketing, organizing pilgrimages, and providing basic air-tickets rather than creating complex inbound packages. Moreover, integration with global distribution channels and Internet websites is uneven, and only a small fraction of travel agencies seems to be associated structurally with European tour

¹Algeria Invest. (2025, November). Tourism in Algeria: 10,000 additional beds by 2026. Retrieved from Algeria Invest, summarising Ministry of Tourism data.

operators or other international organizations.¹ Therefore, the intermediation pillar in Algeria exists in a relatively fragmented and domestically-focused state, with relatively poor potential for connecting international demand to Algerian tourism products.

There is no official time series by years showing the evolution of the number of travel agencies; neither are there any data on employment in the sector, share of inbound visitors traveling in packages, or online booking penetration rate among Algerian travel agencies. Thus, data gaps seem quite characteristic for the tourism intermediation sector in Algeria.

3.1.2.2 Accommodation Capacity and Spatial Distribution

Amongst the five tourism operational pillars, it is perhaps the accommodation one that provides the most immediate signal of the destination's development dynamics: the number of visitors that the destination can receive, the destination they can be guided to, as well as the prices/quality standards at which they can accommodate visitors. From the past decade onwards, there has been an observable improvement in the case of Algeria's hotel capacity. In spite of this, the occupancy rate and geographical dispersion do not reflect the maturity of this segment. Recently, based on Ministry of Tourism data on hotels investment in the country, the current hotel bed capacity has expanded from 96,898 in 2012 to around 145,526 by the end of the decade (during which the country witnessed a stagnation period related to the pandemic outbreak), then increasing to 151,052 beds as of 2023.²

The numbers indicate that Algerian accommodation capacity has risen by more than 50 per cent in about ten years. From the point of view presented in Chap-

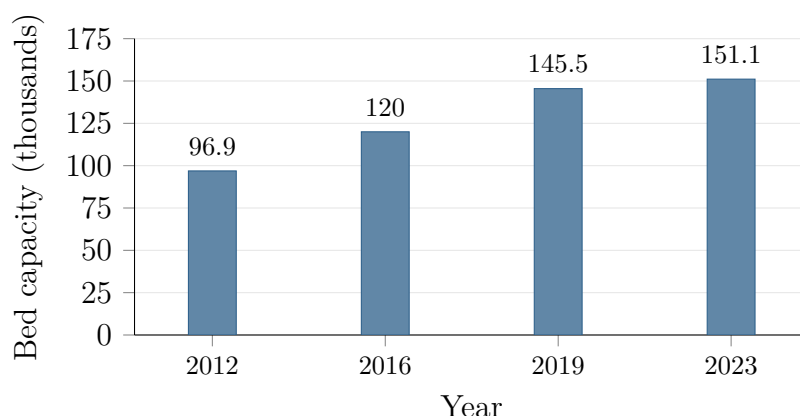
¹Boukhelifa, M. (2023). Digital tourism in Algeria as a case study. *Journal of Economic and Management Studies*. The author argues that the digitalization of tourism enterprises in Algeria is highly uneven, and that a large part of travel agencies is poorly integrated into global distribution channels.

²Figures compiled from Ministry of Tourism data and summarized in Chettabi & Moali, "Tourism in Algeria," and related investment reports. Note that Boutafenouchet et al. (2026) report the figure 145,526 as the 2022 total, consistent with near-zero net growth during the COVID-19 period; in fact, similar figures are quoted by national investment analyses as early as 2019 prior to the pandemic-related freezing of new openings.

Table 3.2. Evolution of hotel bed capacity in Algeria (selected years)

Year	Bed capacity	Change since 2012
2012	96,898	—
2016	≈120,000	+24%
2019	145,526	+50%
2023	151,052	+56%

Source: Ministry of Tourism statistics reported in Chettabi & Moali (2025) and national tourism investment studies. The 2016 figure is approximate, interpolated from the available series.

**Figure 3.2.** Evolution of Hotel Bed Capacity in Algeria (selected years)

Source: Same as Table 3.2. Values in thousands; 2016 figure is approximate (interpolated).

ter Two, this suggests substantial expansion of the physical infrastructure in the tourism industry. The rise can be explained mainly by expansion of the private sector, as recent publications indicate that 90 per cent of all bed capacity is in privately owned facilities, compared to long decades during which Algerian hotels were mostly state-owned establishments.¹

However, when considered relatively to the size of the country, its population, and its potential, the actual number of beds is relatively low. Beyond this, their distribution is highly uneven, with urban and coastal facilities accounting for the vast majority of the available beds. As Chettabi and Moali note, Saharan, spa, and climatic tourism, in which one can find some of the greatest Algerian assets, cover

¹Ministère du Tourisme et de l'Artisanat algérien, *Schéma Directeur d'Aménagement Touristique 2030 (SDAT 2030)*, Algiers: Ministère du Tourisme, 2008 (updated 2020); see also Chettabi & Moali, "Tourism in Algeria," p. 261, who quote Ministry of Tourism statistics indicating that 90.84 per cent of the bed capacity was owned by the private sector in 2023.

a tiny fraction of bed capacity.¹ While this unevenness corresponds to domestic demand for holiday facilities, it reflects insufficient development of international tourism in those areas. The accommodation pillar thus exists, but it has developed in a manner suited to the needs of urban businessmen and local tourists, not for serving leisure travellers coming from abroad.

No readily available time series exist presenting indicators such as occupancy rate by star rating, revenue per available room (RevPAR), or even bed capacity breakdown by classification. The ONS or the Ministry of Tourism does not produce a disaggregated report on the performance of hotels comparable to that which Morocco's Tourism Observatory presents quarterly. Therefore, the academic literature relies on aggregate data on overnight stays as proxies for occupancy rates, because direct hotel-level metrics are unavailable. This gap in information is symptomatic of the fact that Algeria does not have its own Tourism Satellite Account (TSA).

3.1.2.3 Recreation, Animation, and Ancillary Services

Ancillary services and recreation-related activities — including guided tours, cultural shows, visits to heritage sites, sports, tourist-oriented retail services — are key factors contributing to both attractiveness and profitability of the destination. In Algeria, comprehensive quantitative data on those items is relatively rare. However, the information available gives us enough ground to characterize the current state of affairs.

According to a recent geographical analysis of Algerian tourism flows, quoting Ministry of Tourism data, the number of overnight stays in tourist accommodations has risen almost continuously from 2010 to 2019 to reach 7.69 million overnight stays in 2019. Since then, the number declined dramatically due to the COVID-19 pandemic but recovered to about 5.37 million overnight stays in 2022.²

¹Chettabi, K., & Moali, M. (2025). Tourism in Algeria. *Journal of Wisdom for Research and Studies*, 5(6), 260–263.

²Boutafenouchet, S., Rezzaz, M. A., & Kebaili, F. K. (2026). Initial insights into Algerian tourism development with a brief example from Jijel. *Geojournal of Tourism and Geosites*, 64(1), 165–175. The authors present national Ministry of Tourism statistics indicating 7,690,926 overnight stays in 2019 and 5,373,928 in 2022.

Connecting overnight stays to bed capacity provides an approximate ratio of utilisation. Dividing the 145,526 available beds in 2019 by 7.69 million overnight stays leads roughly to 53 overnight stays per bed per year or a potential occupancy rate of about 14-15 per cent for a year with 365 available days.¹ As discussed in Chapter One, tourists co-produce the experience of destination in a complex relationship where the success of visits translates into economic gains only if accompanied by experiences that are conducive to prolonged economic activity. This low ratio points to a structural problem on the demand retention side. This view is supported by econometric analysis conducted by Boutafenouchet et al. in their paper “Initial Insights into Algerian Tourism Development with a Brief Example from Jijel”.² Their findings show a statistically significant increase of tourists due to expansion of hotel bed capacity, but a statistically *insignificant* effect on overnight stays, summer tourists, and tourism’s direct and indirect GDP contributions.³ Such analytical results are important because they imply that although Algeria has successfully attracted more tourists, the country did not succeed in retaining them. By increasing the number of accommodation units, Algeria increased only one component of its tourist offering — infrastructure — while underdeveloping other aspects, such as recreation, catering services, or tour management.

Table 3.3 presents overnight stays in tourist accommodation in Algeria for selected years.

The asset base of Algeria’s recreational industry is potentially impressive. Algeria is home to seven UNESCO World Heritage Sites — of international significance, which include a Roman colonial town of Timgad, Djemila (another Roman city, now one of the best-preserved Roman towns in the world), Tipasa (the Phoenician and Roman settlement located near the Mediterranean sea); the Casbah of

¹17,690,926 overnight stays $\div$ 145,526 beds $\approx$ 52.9 overnight stays per bed per year; $\div$ 365 days $\approx$ 14–15% average annual occupancy. This is a rather rough estimation based on potential occupancy, which may vary depending on operational days and establishment-specific distributions.

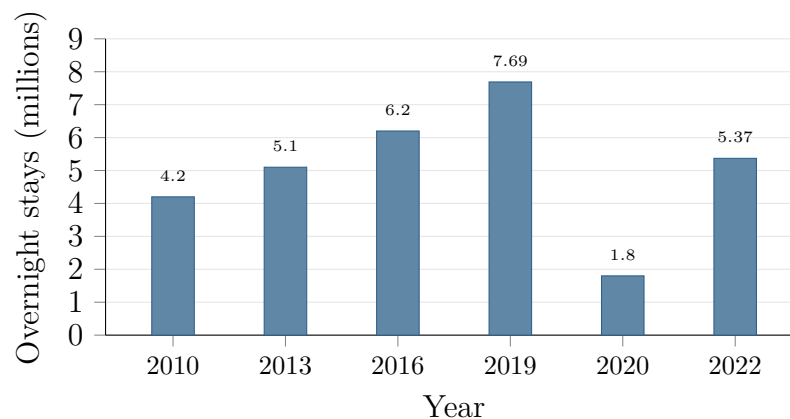
²Boutafenouchet, S., Rezzaz, M. A., & Kebaili, F. K. (2026). Initial insights into Algerian tourism development with a brief example from Jijel. *Geojournal of Tourism and Geosites*, 64(1), 165–175. ANOVA models were estimated using national and wilaya-level tourism data covering the period 2010–2022.

³Boutafenouchet et al. (2026).

Table 3.3. Overnight stays in tourist accommodation in Algeria (selected years)

Year	Overnight stays	Change vs. 2010
2010	≈4,200,000	—
2013	≈5,100,000	+21%
2016	≈6,200,000	+48%
2019	7,690,926	+83%
2020	≈1,800,000	−57%
2022	5,373,928	+28%

Source: Boutafenouchet, Rezzaz & Kebaili (2026), citing Ministry of Tourism national statistics. Figures for 2010–2016 are approximate interpolations from the published series; 2019 and 2022 are exact figures reported in the source. The sharp decline in 2020 reflects COVID-19 border closures.

**Figure 3.3.** Overnight Stays in Tourist Accommodation in Algeria (selected years)

Source: Boutafenouchet, Rezzaz & Kebaili (2026), citing Ministry of Tourism national statistics. Values in millions; 2010–2016 figures are approximate interpolations.

Algiers; M'zab Valley (one of the few existing examples of Mozabite architecture); Tassili n'Ajjer (a region famous for prehistoric rock art; there are over 15,000 engravings and paintings in this region); and the Ahaggar cultural landscape in the central Sahara.¹ The listed sites represent assets of undoubted international importance; however, none of these places have been turned into a managed year-round tourist attraction, comparable with the way that Morocco managed its medinas and Ait Benhaddou.

In particular, the case of Tassili n'Ajjer and Ahaggar regions exemplifies the gap

¹UNESCO World Heritage Centre. (2026a). Algeria. <https://whc.unesco.org/en/states-parties/dz>, accessed March 2026. Accordingly, with seven inscribed UNESCO World Heritage Sites, Algeria ranks fifth in Africa by the number of UNESCO World Heritage Sites.

between resource abundance and maturity of the corresponding industries. Tourism in the deserts and Saharan regions was popular among foreigners before the security downturn in the 1990s. The recent improvement of security in Algeria's south has resulted in a new stream of tourists arriving to Algiers via the three primary gateways — Djanet, Tamanrasset, and Illizi — organised and managed by specialized agencies. That said, the physical and organisational conditions needed to sustain this revival are far from adequate. Desert tourism zones lack the basic infrastructure that a functional destination requires: roads connecting sites are unpaved or poorly maintained, visitor reception points are absent, licensed guides are scarce outside a handful of licensed operators in Tamanrasset, and communication coverage across the southern wilayas remains inconsistent.¹

Seasonal concentration of coastal tourism (summer season) characterizes the primary segment of Algeria's domestic tourist flows, accounting for almost all of them in July and August months. Coastal cities, such as Tipaza, Bou Ismail, Tigzirt, Bejaia, Skikda, and Annaba, attract enormous number of visitors in the high season; however, the recreational and tourist programming for other times of the year is negligible.² Moreover, even the coastal cultural and heritage sites, such as Roman ruins of Tipaza, located in proximity to beaches, remain unutilized — the combination of beach and cultural stays could become an appealing attraction point.

Finally, tourism in Algiers, Constantine, and other cities with strong historical heritage shows a similar pattern. The cities possess considerable cultural assets (including Ottoman palaces, historical mosques, museums, traditional crafts markets etc.) that should be promoted to tourists systematically. However, the relevant infrastructural support remains lacking: lack of multilingual information systems, professional guidance services, tourist information centres, tourist walkways, evening

¹Khadawi, Khalifa & Khabazi, "Elements of the Tourism Industry in Algeria," pp. 8–11. Saharan tourism zones suffer from weak infrastructure, unreliable services, and lack of licensed and well-trained guides — the three main constraints limiting growth and development of desert tourism in the region.

²Tarfaya, K. (2022). *Ways to promote the tourism sector in Algeria in light of global tourism industry developments* (Doctoral thesis, Algeria, pp. 78–83). One of the major shortcomings in the management of Algeria's tourism industry lies in the failure to combine beach and heritage tourism products into composite tourism packages.

cultural programs, etc.¹ The total visitor attendance figures, number of licensed tour guides (national level) and expenditures on recreational activities are not collected or published by Algerian tourism officials (or do not exist). The lack of such statistics is important because it implies the absence of proper management infrastructure, required for measuring such indicators. In practice, the current lack of metrics implies the inability of Algerian tourism authorities to evaluate the performance of specific sites, visitors' expenditures patterns, and the extent of recreational offer's effectiveness.

3.1.2.4 Food and Catering Services

The next pillar consists of the provision of food services and restaurant-related activities. For statistical purposes, the ONS combines hotels, cafes, and restaurants into one sector for calculating the sector's contribution to the GDP of the country. The total contribution of this sector was estimated in 2016 at 1.4 per cent.² WTTC estimates for the broader category — the travel and tourism industry (including food services, accommodation and related sectors) — suggest that the corresponding figures are higher — 3.5-3.6 per cent in terms of direct GDP contribution in 2015-2017, and 6.6-7.4 per cent for total contribution (direct and indirect contributions).³

Observationally, the catering pillar in Algeria can be defined through the presence of a relatively small number of high-quality caterers in urban centers and tourist locations, while the large majority of food catering remains informal or semi-formal. The local cuisine is rich and varied from region to region but has yet to be organized into a formal tourism product such as gastronomic tours, cooking classes, and food festivals along the lines described in Chapter Two. No official figures are available regarding the number of tourist-specific dining facilities, proportion of expenditure

¹Oudaifia, L. (2020). *Tourism in Algeria between the reality and the challenges* (Master's thesis, University of Annaba). Tourist behavior studies show that the average foreigner does not show disinterest to cultural heritage but lacks the proper infrastructure to engage with it.

²Oxford Business Group. (2017). Stepping up: While the outlook for the sector is positive, challenges remain. In *The Report: Algeria 2017*. Oxford Business Group, citing ONS data.

³World Travel & Tourism Council (WTTC). (2018). *Algeria: Travel & Tourism Economic Impact 2018*. WTTC.

spent on F&B among the total amount spent on tourism, and the number of international certification of catering establishments. The absence of such data reflects both the lack of TSA and the underdeveloped status of gastronomy as an independent tourism focus area in Algeria.

Table 3.4 summarises the estimated GDP contribution of the hospitality and catering sector in Algeria.

Table 3.4. Estimated contribution of the hospitality and catering sector in Algeria

Source	Scope	Period	GDP share
ONS / Oxford Business Group	Hotels, cafés & restaurants only	2016	1.4%
WTTC	Travel & tourism (direct)	2015–2017	3.5–3.6%
WTTC	Travel & tourism (total incl. indirect)	2015–2017	6.6–7.4%

Sources: ONS data reported in Oxford Business Group, *The Report: Algeria 2017*; World Travel & Tourism Council (WTTC), *Algeria: Travel & Tourism Economic Impact 2018*, London: WTTC, 2018. No Tourism Satellite Account exists for Algeria; figures therefore rely on partial sectoral estimates and WTTC modelling, which explains the wide range between the narrow ONS measure and the broader WTTC aggregate.

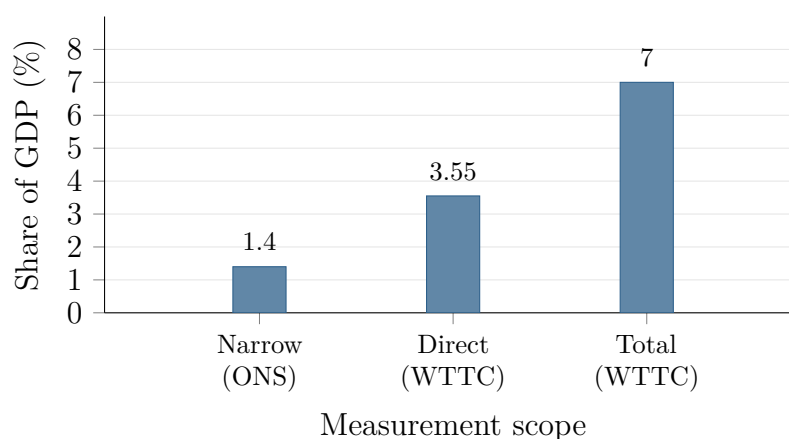


Figure 3.4. Hospitality and Catering Sector: GDP Contribution Estimates in Algeria
Source: ONS data in Oxford Business Group, *The Report: Algeria 2017*; WTTC, *Algeria: Travel & Tourism Economic Impact 2018*. “Narrow” = hotels, cafés & restaurants only (2016); “Direct” and “Total” = WTTC travel & tourism aggregate (2015–2017 average). The WTTC “Total” bar uses the midpoint of the 6.6–7.4% range.

3.1.3 Tourism Indicators and Economic Contribution

3.1.3.1 Arrivals and Receipts

In translating the observations from the operational pillars into the language of macroeconomics, one needs to look at arrivals, receipts, and the link between receipts and GDP. Table 3.5 gives a summary of the relevant indicators for Algeria in 2010–2020 — a period covering the relatively stable pre-COVID-19 years as well as the COVID-19 shock.

Table 3.5. International tourist arrivals and tourism receipts in Algeria (selected years)

Year	Arrivals (millions)	Receipts (US\$ m.)	Receipts (% GDP)
2010	2.07	324	0.18%
2013	2.73	319	0.14%
2015	1.71	347	0.18%
2019	2.37	140	0.07%
2020	0.59	50	0.03%

Source: World Bank, “International tourism, number of arrivals” (ST.INT.ARVL) and “International tourism, receipts (current US\$)” (ST.INT.TVLR.CD), series for Algeria, based on UNWTO, accessed March 2026. Percent-of-GDP estimates from World Bank indicator ST.INT.RCPT.XP.ZS.

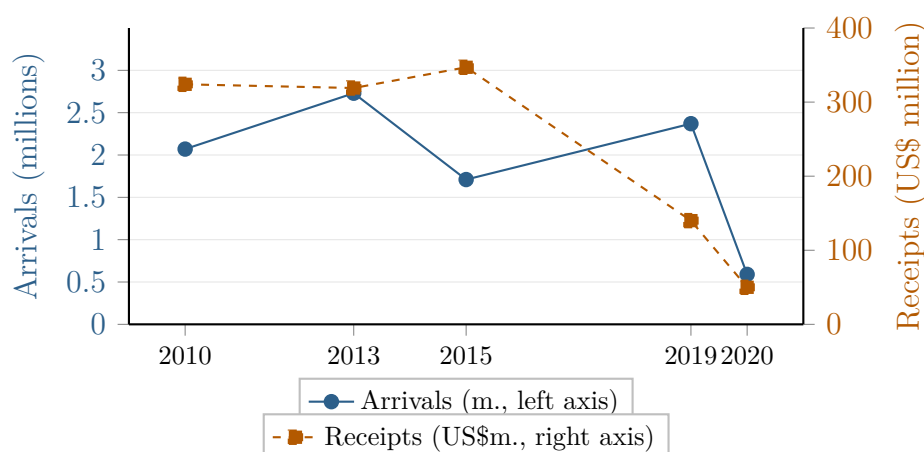


Figure 3.5. Algeria — International Tourist Arrivals and Receipts, 2010–2020

Source: Same as Table 3.5. Note the divergence: arrivals recovered after 2015 but receipts continued to fall, illustrating the low yield-per-visitor problem.

As the numbers in Table 3.5 show, Algeria’s number of international tourist arrivals in the 2010s never reached 3 million per year, while tourism receipts plum-

meted to extremely low levels by the end of the decade. By 2019, tourism receipts amounting to approximately 140 million US dollars represented a mere 0.07 per cent of GDP, an exceptionally low proportion not only compared to the average global level, but also relative to that of the countries of the region.¹ From the point of view of the tourism systems framework outlined in Chapter One, this is an indication of strong bottlenecks in the economic capture phase: although the flows exist, the economic transformation of these flows into monetary value is inefficient.

3.1.3.2 Average Per-Tourist Receipts and Length of Stay

If one divides receipts by the number of arrivals, the resulting indicator of receipts per arrival is, strictly speaking, an inexact measure of tourists' money spent, but does nevertheless reveal something about the quality of the tourism product. For Algeria, these calculations yield per-tourist receipts of about 156 and only 59 US dollars respectively in 2010 and 2019 — essentially halving in just one decade — while arrivals remained in the range of 1.7–2.7 million in both years.² While this decline may seem surprising in light of the stable arrivals, it is not surprising when one considers that receipts per tourist decreased so dramatically because the average visit became less economically productive — shorter stays, reduced utilisation of formal accommodations, and lower commercial tourism expenditures. Contrary to the world trend where increased incomes in main source countries and new products/capabilities have driven up yields, Algeria saw yields decline.

National official statistics do not give any data on average length of stay for international tourists in Algeria. One research paper on tourism in Southern Algeria states that average stay of foreigners in tourist accommodations in the research area did not surpass two days and concludes that short length of stay and low occupancy rates were serious constraints on tourism revenues.³ Even though the

¹Worldwide, the average figure for tourism receipts as a percentage of GDP in 2019 was around 3.33 per cent. World Bank, “International tourism, receipts (% of GDP)” (ST.INT.RCPT.XP.ZS), accessed March 2026.

²Both values calculated based on Table 3.5 dividing receipts by arrivals. They should be treated more as orders of magnitude than precise tourism expenditure indicators.

³Benmehidi, M. (2016). *Length of stay and tourism performance in southern Algeria* (Master's

finding cannot be directly extrapolated to cover the whole country, it aligns with the low receipts-per-arrival figures above. Considering the five components framework from Chapter One, one can conclude that there is likely insufficient choice and involvement for foreign visitors in Algeria, which results in shorter visits.

3.1.3.3 Macroeconomic Contribution and Employment

The preceding indicator does not provide a complete picture. According to the WTTC, travel and tourism's direct GDP contribution, including domestic tourism spending and the entire hospitality sector, accounted for around 3.5–3.6 per cent of GDP for Algeria in 2015–2017, and rose to approximately 6.6–7.4 per cent after the indirect supply chain and induced impact contributions were taken into account.¹ Employment-wise, the situation looks similar: according to the WTTC, travel and tourism directly supported some 300,000 jobs in Algeria in 2019, and had a total (direct and indirect) effect on employment of up to 550,000 jobs.²

Table 3.6 presents WTTC estimates of tourism's macroeconomic contribution in Algeria.

Table 3.6. WTTC estimates of tourism's macroeconomic contribution in Algeria

Indicator	Direct contribution	Total contribution
Share of GDP (2015–2017 avg.)	3.5–3.6%	6.6–7.4%
Employment (2019)	≈300,000 jobs	≈550,000 jobs
Employment share of total (%)	≈2.6%	≈4.7%

Sources: World Travel & Tourism Council (WTTC), *Algeria: Economic Impact of Travel & Tourism 2018*, London: WTTC, 2018, for GDP share estimates; WTTC, *Algeria: Economic Impact of Travel & Tourism 2023*, London: WTTC, 2023, for employment figures. “Direct” contribution covers hotels, airlines, travel agents, and leisure industries; “Total” adds indirect supply-chain and induced income effects via the WTTC satellite account model.

Two conclusions can be drawn from these estimates. First, the hospitality and

thesis, University of Ouargla, pp. 45–47).

¹WTTC. (2018a). *Algeria: Travel & Tourism Economic Impact 2018*. WTTC.

²WTTC. (2023a). *Algeria: Economic Impact of Travel & Tourism 2023*. WTTC.



GDP share uses midpoint of ranges (3.55% direct; 7.0% total). Employment in units of 100,000.
Sources: WTTC (2018) for GDP share; WTTC (2023) for employment.

Figure 3.6. Direct vs. Total Tourism Contribution in Algeria: GDP and Employment

catering sector in Algeria — restaurants, hammams, and craft markets used by Algerians as well as foreign tourists — plays a significant role in travel and tourism. In other words, the economic rationale for developing the tourism industry in Algeria goes beyond merely boosting international arrivals. Second, even if one takes into account the indirect and induced factors, tourism contributed far less to Algeria's GDP than the approximately 7.1 per cent direct contribution and 13 per cent total contribution in neighbouring Morocco — thus confirming that tourism continues to play a secondary role in the economy of Algeria and needs development.

Section Summary

From the above analysis, the following emerges. Algeria has tremendous natural and cultural resources to develop its tourism sector: the country possesses seven UNESCO World Heritage Sites, large Saharan landscapes, a coastline by the Mediterranean, and intangible cultural heritage. However, the operational pillars that should allow one to derive economic benefit from these assets are underdeveloped: accommodation is limited and spatially uneven; travel agencies are numerous but mostly oriented domestically; recreational services and infrastructure at historical sites are underdeveloped; food and catering has yet to be developed as a tourism

product; and travel connectivity did not result in large enough inflows of international leisure visitors. This leads to the poor capture of the economic potential of the resources through a tourism industry that generates approximately 59 USD per tourist on average, an occupancy rate of 14-15 per cent, and tourism receipts of only 0.07 per cent of GDP. This forms the baseline for assessing Morocco's performance below.

3.2 The Tourism Sector in Morocco

General Context

Like Algeria, Morocco is a constitutional monarchy, located in the far north-western part of Africa, covering 446,550 square kilometres and having a population of about 37 million. As in Algeria, the economic structure in Morocco includes agriculture, industry, services, remittances, and tourism, although its dependence on hydrocarbons is lower. With respect to regional and global connectivity, Morocco enjoys its geographical position close to the Iberian Peninsula (only 14 kilometres separate the two countries through the Strait of Gibraltar), solid diplomatic and commercial relations with the European Union, and membership in numerous free trade agreements that make for easier mobility of goods, services, and people. All these favourable factors have been deliberately taken advantage of in Moroccan tourism development through liberal sky rules and open skies with the EU, flexible visa regulations for many nationalities, and active international promotion by the Moroccan agency (ONMT). Consequently, the country occupies the leading position among African nations in terms of tourism accessibility and recognisability.¹ This brief overview is fundamental to understanding why Morocco has advanced its tourism pillars better and faster than Algeria did.

¹OECD. (2022). Morocco. In *OECD Tourism Trends and Policies 2022* (p. 1). OECD Publishing.

3.2.1 Tourism Resources in Morocco

Morocco is well-endowed with tourism resources. In terms of natural potential, the country has Mediterranean and Atlantic coastal areas, as well as the Rif and Atlas mountains and extensive territories covered by Sahara in the south and the east, which enables the development of various forms of tourism, such as coastal, mountain, desert, or rural tourism. From a cultural perspective, Morocco features a variety of historic imperial cities — Marrakech, Fès, Meknès, and Rabat — with a variety of landmarks, from medinas and palaces to mosques and souks. The UNESCO World Heritage List includes Fès, the Medina of Marrakech, Ait Benhaddou, ancient archaeological sites like Volubilis, and the Portuguese City of Mazagan. Traditional riads architecture, a wide range of festivals, and a positive reputation as a hospitable host add value to Morocco’s tourism appeal in the area of cultural and urban tourism.

As importantly, Morocco is known for actively leveraging its abundant tourism resources within its national tourism strategies, such as “Vision 2010” and “Vision 2020,” with quantified goals for arrivals, accommodation capacity, and investment, priority tourism zones and products, and mobilisation of both public and private sectors.¹ Within the context of Chapter One, it can be said that Morocco has succeeded in converting resources into tourism products thanks to clearly outlined and state-supported development paths.

3.2.2 Tourism Development Policies and Strategies

Understanding the development of Morocco’s tourism sector in recent decades is impossible without considering several national tourism strategies, each of which has played a unique role in shaping the tourism development in the country. Unlike Algeria, where the sole national document is still SDAT 2030, Morocco has been pursuing coordinated tourism development through a series of successive national

¹OECD. (2022). Morocco. In *OECD Tourism Trends and Policies 2022*. OECD Publishing.

strategies, each of which built on the foundations laid by its predecessor.¹

Plan Azur, launched at the turn of the century, concentrated investment on coastal zones that had been commercially underused, with the aim of creating large-scale integrated resort destinations rather than expanding existing urban hotel stock.² The plan was followed by a broader national strategy — Vision 2010 — whose headline target of ten million annual arrivals Morocco actually met, alongside complementary goals in bed capacity, employment, and revenue generation.³

Vision 2020 then pushed the ambition further, targeting a doubling of arrivals and an expansion of niche product categories — ecotourism, cultural tourism, wellness, and adventure — alongside the established coastal and urban segments.⁴ COVID-19 interrupted progress towards these targets, but the recovery that followed was rapid enough to confirm that the underlying model remained sound: arrivals reached 14.5 million in 2023 and 17.4 million in 2024.

Underpinning all three strategies were institutional structures that Algeria currently lacks. The National Tourist Office of Morocco (ONMT) handled international promotion and branding, while the Ministry of Tourism provided regulatory oversight. A dedicated Tourism Observatory produced quarterly statistical reports on arrivals, overnight stays, revenue, and market segmentation, giving policymakers the data needed to track performance and adjust course. Taken together, this combination of sequenced strategy, dedicated financing through the FMDT, airline access agreements, and real-time statistical monitoring constitutes a governance model whose results are visible in the performance data examined throughout this section.⁵

The above discussion highlights the importance of the tourism policy background

¹More detailed information on tourism policies in Morocco can be found in OECD, “Morocco,” in *OECD Tourism Trends and Policies 2022*, Paris: OECD Publishing, 2022; and European Commission, “Morocco: EU Tourism Policy Review,” Brussels, 2019.

²Ibid.

³OECD, “Morocco,” in *OECD Tourism Trends and Policies 2022*. According to the official statistics, Vision 2010 targeted 10 million tourists, 160,000 hotel beds, 48 billion dirhams of income, and 600,000 direct jobs in the tourism sector.

⁴Ibid. In particular, “Vision 2020” prioritised the development of ecotourism, cultural tourism, wellness tourism, and adventure tourism, along with the traditional segments.

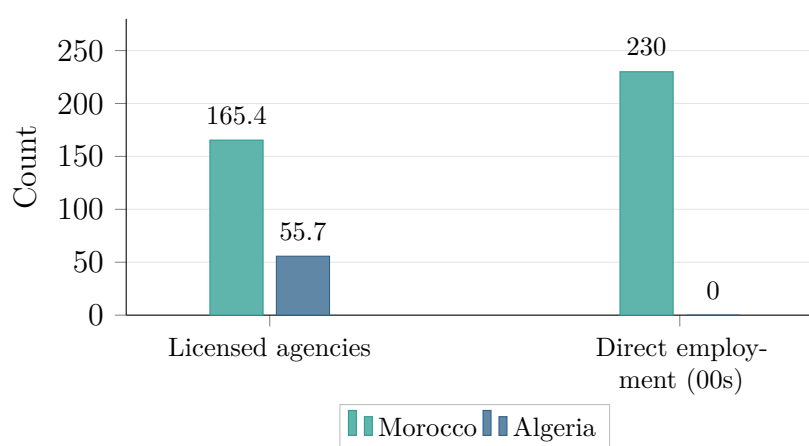
⁵Indeed, between 2000 and 2019, the number of arrivals almost tripled from 4.5 million to 13.1 million tourists according to official statistics. See World Bank, “International tourism, number of arrivals” (ST.INT.ARVL), series for Morocco, accessed March 2026.

for the further pillar-to-pillar comparison because the difference between the two countries with respect to operational pillars of tourism is not due to geographical or cultural differences, but rather results from long-term political will and consistent efforts.

3.2.2.1 Tour Organisation and Travel Agencies

Morocco's intermediary pillar — the network of tour operators and travel agencies connecting source markets to Moroccan destinations — is both extensive and internationally integrated. OECD data for 2019 put the number of formally registered establishments in this segment at 1,654, with direct sector employment of around 23,000 people.¹ Beyond the national operators, a wide range of European and Gulf tour operators include Moroccan products in their catalogues, and major online booking platforms carry a substantial Moroccan inventory, creating a distribution layer that extends the sector's reach well beyond what domestic agency numbers alone would suggest.

Table 3.7 presents a comparison of the travel agency sector between Morocco and Algeria.



Note: agency counts scaled to hundreds for comparability with employment data. Algeria employment data unavailable (shown as zero). *Sources:* OECD (2022); Algeria Invest (2025); Boukhelifa (2023).

Figure 3.7. Travel Agency Sector: Morocco vs. Algeria

According to the national observatory reports, package tourism organised by

¹OECD. (2022). Morocco. In *OECD Tourism Trends and Policies 2022*. OECD Publishing.

Table 3.7. Travel agency sector comparison: Morocco vs. Algeria

Indicator	Morocco	Algeria	Note
Licensed establishments (count)	1,654	5,570	Morocco 2019; Algeria 2024
Sector employment (direct jobs)	23,000	N/A	Morocco: OECD 2019
International integration status	High	Low	Qualitative assessment
GDS / OTA presence	Yes	Limited	ONMT 2019; Boukhelifa 2023
Inbound package tour share (%)	Not available	Not available	No harmonised data in sources

Sources: OECD, “Morocco,” *OECD Tourism Trends and Policies 2022*, Paris: OECD, 2022, for Morocco establishment and employment counts (2019 data); Ministry of Tourism Algeria via Algeria Invest (2025) for Algeria agency count; Boukhelifa (2023) for Algeria integration assessment; ONMT, *Tourisme au Maroc: Chiffres clés*, 2019, for Morocco GDS/OTA presence. International integration status is a qualitative assessment based on Boukhelifa (2023) and ONMT (2019). No reliable disaggregated data on inbound package tour shares are available for either country from the cited sources.

travel agencies from European source markets, especially to coastal resorts and Marrakech, has traditionally been the leading method of marketing, accounting for a notable percentage of the total number of arrivals in the country, even though the percentage of independent travel and online booking has grown steadily over recent years.¹ However, the distinguishing feature of Morocco’s intermediary pillar vis-à-vis Algeria is not merely the number of establishments operating within it, but also the degree of their internationalisation. Moroccan tourist routes are regularly included in the catalogues and brochures of leading European tour operators, while the country also has the advantage of the amplifying effect of having its destinations available through such platforms as Booking.com, Expedia, and Airbnb, whose vast audiences are capable of generating millions of bookings per year. This visibility becomes self-sustaining through positive reviews that, once collected, bring yet more tourists. On the contrary, Algeria has been mostly left out of such platforms, as the

¹Moroccan Tourism Observatory and Confédération Nationale du Tourisme, annual reports (various years); OECD. (2022). Morocco. In *OECD Tourism Trends and Policies 2022*. OECD Publishing.

country's tour operators focus on domestic tourism and religious pilgrimage rather than marketing foreign leisure packages to international markets.

3.2.2.2 Accommodation Capacity and Product Diversification

Comparative statistical information shows that Morocco possesses a more developed and diverse pillar of tourist accommodations than Algeria does. According to data compiled on the basis of the information provided by national authorities, the number of beds provided by tourist accommodation establishments increased in Morocco from 200,000 in 2013 to about 280,000 in 2021.¹

Table 3.8. Tourist accommodation bed capacity in Morocco (selected years)

Year	Bed capacity	Change since 2013
2013	≈200,000	—
2016	≈230,000	+15%
2019	≈250,000	+25%
2021	≈280,000	+40%

Source: Moroccan Ministry of Tourism statistics as reported in Statista, “Tourist accommodation capacity in Morocco 2013–2021.”

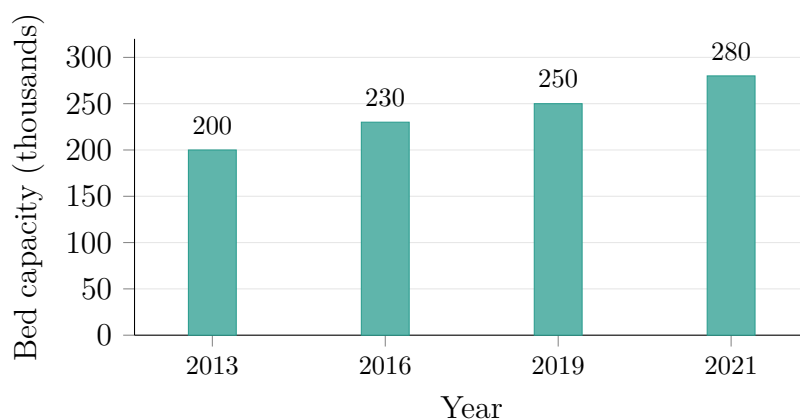


Figure 3.8. Evolution of Hotel Bed Capacity in Morocco (selected years)

Source: Same as Table 3.8. Values in thousands; all figures are approximate.

Detailed data on the performance of hotels and similar establishments provided by the Moroccan Tourism Observatory show that the occupancy rate of hotel rooms

¹Statista, “Tourist accommodation capacity in Morocco 2013–2021,” based on Moroccan Ministry of Tourism statistics, accessed March 2026, <https://www.statista.com/statistics/1245820/tourist-accommodation-capacity-in-morocco/>.

ranged between around 40 per cent and 60 per cent in the period between mid-decade 2010s and the beginning of the COVID-19 crisis in 2020, after which it fell to just 26 per cent in 2020 due to pandemic-related effects.¹ In contrast with the indicated 14–15 per cent national occupancy rate in Algeria, the figures show much more intensive use of Morocco’s accommodation pillar. Another factor that widens the gap between the two countries’ accommodation pillars is the greater variety of product categories used in their supply structures: while Algeria is focused on standard hotels in urban and coastal areas, Morocco boasts luxury riads in historic medinas, large coastal resort complexes, rural guesthouses in the Atlas range, and desert camp facilities in the Saharan regions of the south. This product diversification achieved through various stages of national tourism development strategy has endowed the country’s accommodation pillar with much greater depth, which its Algerian counterpart currently lacks. By serving a wide variety of price points and motivations, one single supply structure can be described as a flexible business solution, which, according to Chapter Two, is one of the determinants of tourism sector competitiveness.

3.2.2.3 Recreation, Animation, and Ancillary Services

The recreation pillar of Morocco’s tourism offer is among the best-developed tourism components of the country by far, which manifests itself in the number of overnight stays recorded by national observatory sources. Prior to the COVID-19 crisis, overnight stays in classified tourist establishments rose from 16.8 million to 24.4 million between 2012 and 2019, implying cumulative growth of 45 per cent in seven years — an achievement attributable both to increasing volume of visitors and the growing average length of stays facilitated by diversified products.² According to data provided by the Ministry of Tourism, overnight stays in all categories of tourist

¹Statista. (2026b). Occupancy rate of rooms in hotels and similar establishments in Morocco from 2015 to 2020 [Based on Moroccan Tourism Observatory data]. Retrieved March 2026 from <https://www.statista.com/statistics/1253100/hotel-rooms-occupancy-rate-in-morocco/>.

²Statista. (2026c). Overnight stays in tourist establishments in Morocco 2012–2020. Retrieved March 2026 from Statista.

accommodations amounted to 28.7 million in 2024, a 12 per cent increase compared to 2023. The country recorded tourism revenues of 112 billion Moroccan dirhams — a 43 per cent increase since 2019.¹

Table 3.9 presents overnight stays in classified tourist establishments in Morocco for selected years.

Table 3.9. Overnight stays in classified tourist establishments in Morocco (selected years)

Year	Overnight stays (millions)	Change vs. 2012
2012	16.8	—
2015	19.3	+15%
2017	22.0	+31%
2019	24.4	+45%
2020	7.1	−58%
2023	25.6	+52%
2024	28.7	+71%

Sources: Statista, “Overnight stays in tourist establishments in Morocco 2012–2020,” based on Moroccan tourism statistics, accessed March 2026; Moroccan Ministry of Tourism, “Key Figures: Morocco Set New Tourism Benchmarks in 2024,” press release, 5 February 2025. Figures for 2015 and 2017 are approximate interpolations from the published series. The 2020 decline reflects COVID-19 border closures.

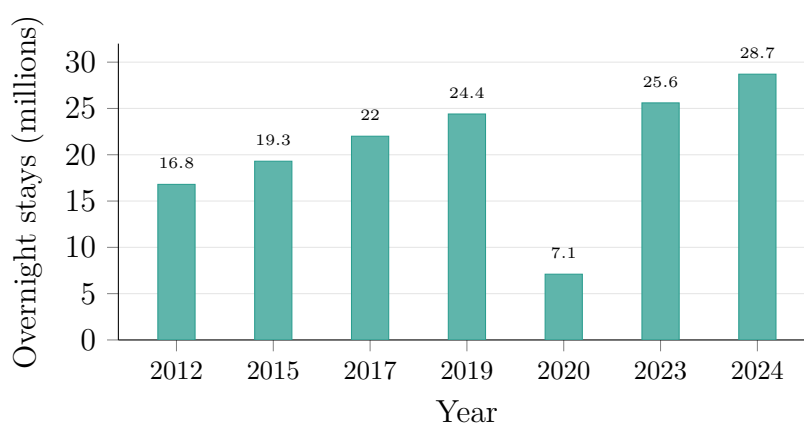


Figure 3.9. Overnight Stays in Classified Tourist Establishments in Morocco (selected years)

Source: Statista, “Overnight stays in tourist establishments in Morocco 2012–2020”; Moroccan Ministry of Tourism press release, 5 February 2025. Values in millions; 2015 and 2017 are approximate interpolations.

¹Moroccan Ministry of Tourism. (2025, February 5). *Key figures: Morocco set new tourism benchmarks in 2024* [Press release]. <https://mtaess.gov.ma/fr/key-figures/>.

As the above figures suggest, what enables the high number of overnight stays in Morocco is a wide and all-year-round recreational offer. Unlike the predominantly summer coastal market in Algeria, Morocco has managed to extend its tourist season by deliberately cultivating events and activities distributed across the full calendar. The country's festival circuit, which draws audiences from Europe, the Gulf, and beyond, keeps certain destinations economically active well into winter — Marrakech in December, Fès and Essaouira around June. Adventure and nature-based tourism adds another layer: the High Atlas draws trekkers, the Draa Valley attracts cyclists, and the Saharan edge around Merzouga brings in those seeking something beyond a beach or a medina. Wellness tourism built around the traditional hammam has similarly been absorbed into the commercial offer. Taken together, these overlapping segments mean that Morocco's tourism revenues are distributed across the year rather than concentrated in a short coastal peak, which makes the economics of running accommodation, catering, and transport businesses substantially more stable.

3.2.2.4 Food and Catering Services

Food and catering services are an important element of Morocco's tourism identity. According to data provided by the World Travel and Tourism Council, the average share of food and beverage spend out of total expenditure in Morocco has generally remained on par with global averages, standing at 15–25 per cent of total tourist spending — in accordance with UNWTO breakdown.¹ Given the 9.95 billion US dollar revenue earned from international tourism in 2019, the share of food and beverage spend would therefore imply an average of 1.5–2.5 billion US dollars spent on food in Morocco.

Table 3.10 presents food and catering indicators for Morocco's tourism sector.

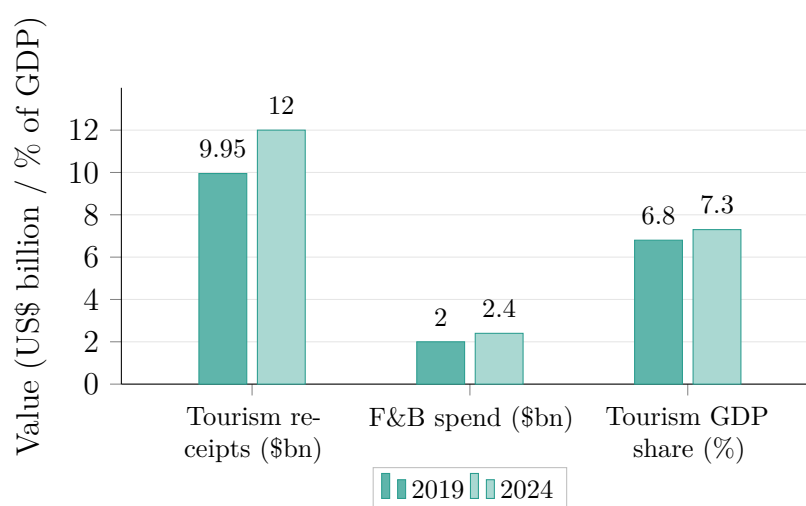
The latest estimate of tourism-related value-added GDP by the High Commission for Planning (HCP) shows an increase of 38.4 per cent between 2019 and 2024,

¹WTTC. (2019b). *Travel & Tourism Economic Impact: Morocco 2019*. WTTC; UNWTO. (2019). *International Tourism Highlights, 2019 Edition*. UNWTO.

Table 3.10. Food and catering indicators in Morocco's tourism sector

Indicator	2019	2024
International tourism receipts (US\$ billion)	9.95	≈12.0
F&B share of tourist spending (%)	15–25%	15–25%
Estimated F&B spend (US\$ billion)	1.5–2.5	≈1.8–3.0
Tourism share of national GDP (%)	6.8%	7.3%
Tourism-related value-added GDP growth (2019–2024)	—	+38.4%

Sources: WTTC, *Travel & Tourism Economic Impact: Morocco 2019*, London: WTTC, 2019; UNWTO, *International Tourism Highlights: 2019 Edition*, Madrid: UNWTO, 2019; High Commission for Planning (HCP), Morocco, as reported in “Morocco strengthens tourism as a key engine of its economy,” Tourism and Society Think Tank, 2 December 2025. The F&B share range follows standard UNWTO expenditure breakdowns. 2024 receipt figure is approximate, derived from 112 billion MAD converted at the prevailing exchange rate.

**Figure 3.10.** Morocco: Food and Tourism Economic Indicators, 2019 vs. 2024

Source: WTTC, *Travel & Tourism Economic Impact: Morocco 2019*; HCP Morocco as reported in Tourism and Society Think Tank (2025). F&B spend values are midpoints of the 15–25% UNWTO share applied to receipts. Tourism GDP share uses HCP data (6.8% in 2019, 7.3% in 2024). 2024 receipts are approximate (112 bn MAD converted at prevailing rate).

leading to an increase in tourism's share in national GDP from 6.8 per cent to 7.3 per cent.¹ The catering pillar drives this performance, both as a direct element of tourist consumption and as a driver of backward linkages to agriculture and food production in Morocco.

¹Tourism and Society Think Tank. (2025, December 2). Morocco strengthens tourism as a key engine of its economy. Retrieved from Tourism and Society Think Tank website. Summarises HCP data.

In addition to this broad economic context, the role of food and cuisine in Moroccan tourism is significant in terms of the structural difference between Moroccan and Algerian tourism. Moroccan cuisine — including dishes such as tagine, couscous, pastilla, and many others featuring spicy meats cooked slowly and served with a wide variety of seasonings — is among the most internationally renowned cooking traditions in Africa and the Arab world. It has been consciously marketed by the ONMT as one of the principal elements of destination marketing.¹ The city of Marrakech alone counts over a dozen cooking schools aimed exclusively at foreign tourists, and the famous Jemaa el-Fna square, a UNESCO Intangible Cultural Heritage site, is in part supported by its reputation as a nightly marketplace serving both food and entertainment.

By comparison, the situation in Algeria illustrates the importance of the catering pillar. Algerian cuisine is no less varied or impressive, covering all the regional specialities from the east, including couscous and chakhchoukha, to the mountainous high plateaux of the north, with their own unique specialities, as well as dishes from the desert south. But despite the richness of Algerian cuisine, it has never been developed as a tourist element. Restaurant offerings in the main touristic zones of Algeria are uneven, there are no separate statistical categories for tourist restaurants, and food experiences are generally not offered in conjunction with tours.² These differences do not stem from culinary quality — both countries have highly developed cuisines — but rather from the degree to which the catering pillar has been exploited within the framework of the tourism product, as described in Chapter 2.

¹ONMT, *Tourisme au Maroc: Chiffres clés*, Rabat: ONMT, 2019; WTTC, “Travel & Tourism Economic Impact: Morocco 2019,” London: WTTC, 2019, which notes the rise of food tourism as an element that increases length of stay and revenue per visitor.

²Tarfaya, K. (2022). *Ways to promote the tourism sector in Algeria in light of global tourism industry developments* (Doctoral thesis, Algeria, pp. 91–94). Notes that Algeria lacks a strategy for gastronomic tourism and a focus on increasing food quality, which is a wasted resource and would increase receipts/tourist if pursued.

3.2.3 Tourism Indicators and Economic Contribution

3.2.3.1 International Arrivals and Receipts

Table 3.11 provides some comparative figures for Morocco on the same period as Algeria.

Table 3.11. International tourist arrivals and tourism receipts in Morocco (selected years)

Year	Arrivals (millions)	Receipts (US\$ bn.)	Receipts (% GDP)
2010	9.75	8.18	≈7.0%
2013	10.35	7.79	≈6.6%
2015	10.18	6.24	≈6.0%
2019	13.11	9.95	≈7.1%
2020	2.80	4.51	≈5.0%

Source: World Bank, “International tourism, number of arrivals” (ST.INT.ARVL) and “International tourism, receipts (current US\$)” (ST.INT.TVLR.CD), series for Morocco, based on UNWTO, accessed March 2026. GDP share for 2019 from OECD, “Morocco,” *OECD Tourism Trends and Policies 2022*.

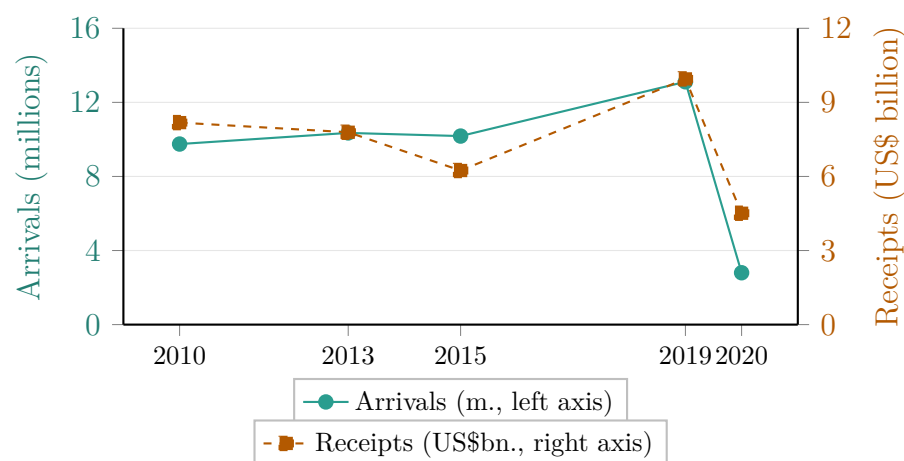


Figure 3.11. Morocco — International Tourist Arrivals and Receipts, 2010–2020

Source: Same as Table 3.11.

The figures show that, unlike Algeria, Morocco did not enjoy a smooth rise in both numbers and revenue during this period. International tourism revenues fell from 8.18 billion US dollars in 2010 to 7.79 billion in 2013 and then again to 6.24 billion in 2015, while international arrivals hovered around 10 million per year. The cause of the slowdown can be explained by regional political unrest in the wake

of the “Arab Springs” of 2011, which depressed the influx of tourists from the Gulf countries, along with currency exchange rate changes that depressed dollars received by Morocco as its receipts were made in dirhams. However, the growth to 9.95 billion US dollars received in 2019, alongside an increase in arrivals to 13.11 million, can be attributed both to improved regional security and Vision 2020.¹ This resilience is a characteristic of a mature and flexible tourism system with a stable set of operational pillars.²

3.2.3.2 Average Receipts per Tourist and Length of Stay

Based on the figures provided, average receipts per international tourist in Morocco can be calculated as about 760 US dollars per arrival (9.95 billion / 13.11 million). This is over twelve times higher than Algeria’s equivalent.

Table 3.12. Key tourism performance indicators in Algeria and Morocco, 2019

Indicator	Algeria	Morocco
International arrivals (millions)	2.37	13.11
Tourism receipts (US\$ billion)	0.14	9.95
Receipts per arrival (US\$)	≈59	≈760
Tourism receipts as % of GDP	0.07%	≈7.1%
Hotel occupancy (indicative)	14–15%	40–60%
Avg. international length of stay	<2 nights	≈4 nights

Sources: World Bank ST.INT.ARVL and ST.INT.TVLR.CD for arrivals and receipts; OECD, “Morocco” (2022) for GDP share; Statista for Moroccan occupancy; Benmehidi (2016) and bed-capacity calculations for Algerian occupancy estimate; Moroccan Tourism Observatory, *Tableau de bord du tourisme*, annual reports for length of stay.

As average length of stay, according to the published statistics provided by the Moroccan Tourism Observatory, the average length of stay in classified establishments was between approximately 2.7 and 3 nights between 2015 and 2020, and the

¹World Bank. (2026a). International tourism, number of arrivals (ST.INT.ARVL) and international tourism, receipts (current US\$) (ST.INT.TVLR.CD), for Morocco, based on UNWTO. Retrieved March 2026 from World Bank Open Data.

²World Bank. (2026a). International tourism, number of arrivals (ST.INT.ARVL) and international tourism, receipts (current US\$) (ST.INT.TVLR.CD), for Morocco, based on UNWTO. Retrieved March 2026 from World Bank Open Data.

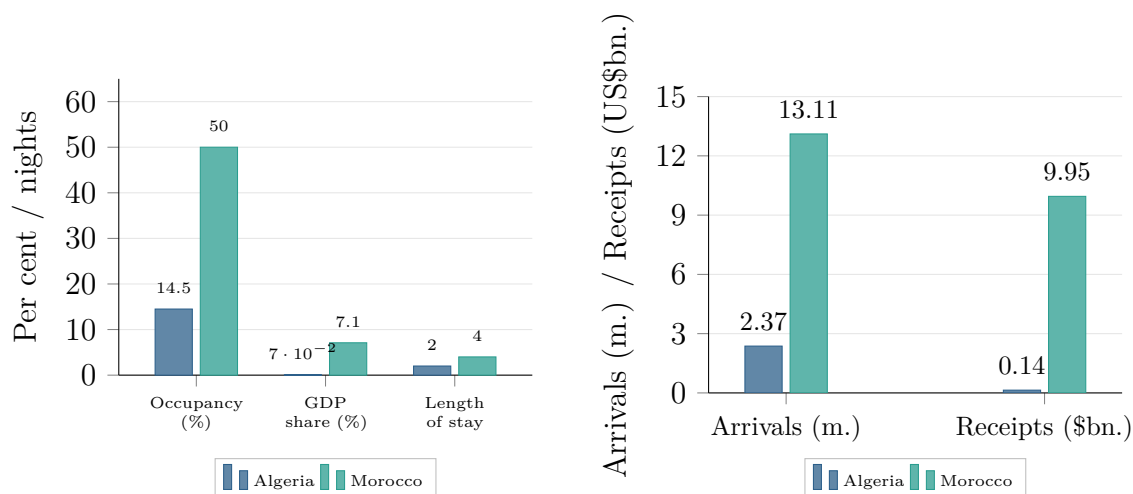


Figure 3.12. Key Tourism Performance Indicators: Algeria vs. Morocco (2019)

Source: Same as Table 3.12. Panel (a): occupancy is midpoint estimate; GDP share and length of stay from OECD and tourism observatory data. Panel (b): receipts in US\$ billions.

overall average length of stay — including non-classified accommodation and guest-houses — was estimated at 4 nights for international tourists.¹ According to later ministerial statements, for 2025, an average length of stay of close to seven days was forecasted. However, this figure seems to relate to the concept of visitor duration in its broadest sense, has yet to enter any formally audited statistical series, and is hence to be regarded as indicative.² Even taking the estimate of 4 nights as a basis, the average length of stay in Morocco is much greater than the sub-two-day length implied by the proxy estimate for Algeria, and accounts for a good part of the gap in receipts-per-tourist between the two.

3.2.3.3 Contribution to Macroeconomy and Employment

According to the OECD, in 2019 tourism accounted for approximately 7.1 per cent of total GDP in Morocco and provided about 565,000 jobs (5 per cent of total employment).³ In more recent estimates, when the calculation of contributions

¹Moroccan Tourism Observatory, *Tableau de bord du tourisme*, annual reports, 2015–2020; OECD, “Morocco,” *OECD Tourism Trends and Policies 2022*, which examines accommodation performance and average stay duration as metrics of Morocco’s product depth.

²Moroccan Ministry of Tourism, remarks by Minister Fatim-Zahra Ammor published in the Moroccan press, April 2026. At the time of writing, this figure had yet to be confirmed by the data from the Tourism Observatory reports.

³OECD. (2022). Morocco. In *OECD Tourism Trends and Policies 2022*. OECD Publishing.

includes indirect and induced impacts as well, tourism's contribution is put at about 12 per cent of GDP and 13 per cent of total employment in 2023.¹

There are several noteworthy features of these contributions. First, the employment-to-arrival ratio in Morocco is very high — 565,000 tourism-related jobs sustained by 13.11 million tourists gives 1 tourism-related job per 23 international arrivals. It reflects the fact that Morocco's tourism model is labor-intensive in that it relies mostly on small and medium-sized establishments (riads, guest houses, guide services, workshops) as opposed to automated hotel chains, meaning that a larger proportion of expenditures is channeled through wages and domestic consumption. Second, the contribution of 7.1 per cent of GDP is roughly the same as in well-established Mediterranean tourist economies such as Portugal and Croatia in the same year — a useful reference point for a developing country whose endowments are similar to, but income levels lower than, those of southern European countries. Third, when the contribution in Morocco is compared to the direct contribution of 3.5–3.6 per cent of GDP in Algeria, which also covers a more diverse set of activities than just tourism, one can see that, despite being less economically developed, Morocco has twice as effective tourism sector — a point we will return to in the concluding chapter.

Section Summary

The foregoing analysis of Morocco's tourism performance shows that the results of over twenty years of deliberate policies have paid off. Firstly, the accommodation pillar is bigger and used more intensively than in Algeria — with some 250,000–280,000 beds and 40–60 per cent occupancy rate in popular destinations it provides a higher capacity of accommodations. Secondly, the intermediation pillar — with 1,654 travel agencies employing 23,000 employees and backed up by a wide network of international tour operators and web platforms — links up the destinations to source markets. Thirdly, the transport pillar — with three international airports, namely those of Casablanca, Marrakech, and Agadir handling more than 25 million

¹World Bank. (2024). *Tourism: Morocco — economy snapshot*. World Bank; WTTC. (2023b). *Travel & Tourism Economic Impact: Morocco 2023*. WTTC.

passengers before the pandemic — ensures air connectivity that enables a high number of arrivals. Fourthly, the recreation and catering pillars have been actively developed over the years through festivals, cultural programmes, and promotion of Moroccan gastronomy. The combination of all the foregoing elements — developed in accordance with the strategies of Vision 2010 and Vision 2020 and guided by the functioning Tourism Observatory — resulted in tourism performance measured as 13.11 million international arrivals with \$9.95 billion of receipts, representing a 7 per cent contribution to GDP and sustaining about 565,000 jobs. This performance sets the benchmark against which the situation in Algeria will be evaluated in the following sections.

3.3 Comparative Analysis of Tourism Development

3.3.1 Comparison of Tourism Pillars in Algeria and Morocco

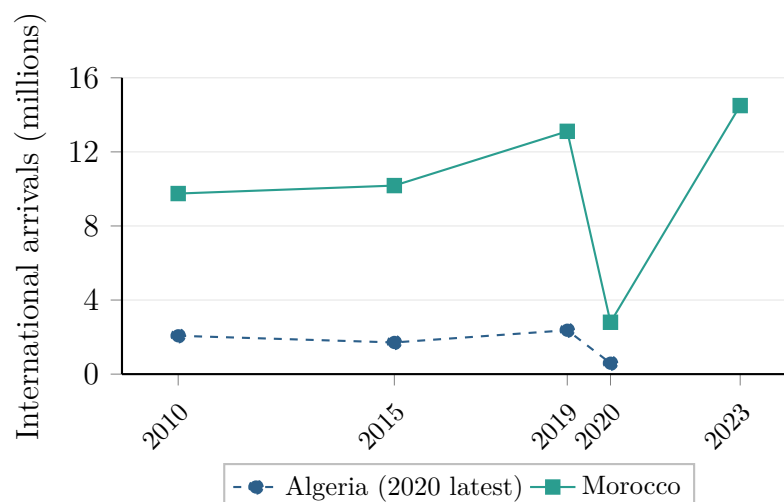
In order to compare tourism pillars, it is first important to look at the overall performance of each of the countries to set the background for the subsequent analysis. Table 3.13 presents some of the key numbers for selected years.

Another useful macro metric that is worth noting in this case is tourism receipts as a share of total exports of goods and services. According to the World Bank, this ratio for Algeria oscillated around 0.3–0.5 per cent in the 2010s due to the country’s heavy dependence on hydrocarbon exports, whereas for Morocco the share was between 16 and 20 per cent. The latter underlines the importance of tourism as a foreign exchange earner, especially in relation to economic diversification, which will be considered further in the final chapter.

Table 3.13. International arrivals and receipts in Algeria and Morocco (selected years)

Year	Algeria		Morocco	
	Arr. (m.)	Rec. (US\$ m.)	Arr. (m.)	Rec. (US\$ bn.)
2010	2.07	324	9.75	8.18
2015	1.71	347	10.18	6.24
2019	2.37	140	13.11	9.95
2020	0.59	50	2.80	4.51
2023	n.a.	n.a.	14.50	n.a.

Source: World Bank, “International tourism, number of arrivals” (ST.INT.ARVL) and “International tourism, receipts (current US\$)” (ST.INT.TVLR.CD) for 2010–2020, based on UNWTO, accessed March 2026. Morocco 2023 arrivals: Moroccan Ministry of Tourism press release, February 2025. Post-2020 Algerian receipts data are unavailable in harmonised form and are therefore omitted to preserve comparability.

**Figure 3.13.** International Tourist Arrivals: Algeria vs. Morocco, 2010–2023

Source: Same as Table 3.13. Morocco 2023 figure from Ministry of Tourism press release (February 2025). Algeria 2023 harmonised data unavailable; series ends at 2020.

3.3.2 Macroeconomic Depth: GDP Contribution, Competitiveness, and Investment

The macro-level comparison of arrivals and receipts undertaken above provides an important but incomplete picture. Three additional dimensions are required to appreciate the full economic gap between the two destinations: the relative weight of tourism in each national economy, the degree to which each country is recognised as internationally competitive according to standardised measures, and the level of

capital that has been directed towards the sector. This subsection addresses each in turn before the pillar-by-pillar analysis that follows.

3.3.2.1 Tourism’s Contribution to GDP and Employment

A meaningful comparison of the two countries’ tourism economies requires moving beyond receipts in absolute terms and considering what proportion of national output the sector actually generates, together with the multiplier effects it produces through backward linkages to domestic suppliers.

Table 3.14. Tourism contribution to GDP and employment: Algeria vs. Morocco (2019)

Indicator	Algeria	Morocco
Direct GDP contribution (%)	3.5–3.6%	≈7.1%
Total GDP contribution (%)	6.6–7.4%	≈12–13%
Receipts as % of GDP	0.07%	≈8.0%
Direct employment (jobs)	≈300,000	≈565,000
Total employment (direct + ind.)	≈550,000	≈13% of total
Jobs per 1,000 international arrivals	≈127	≈43

Sources: WTTC, *Algeria: Economic Impact of Travel & Tourism 2018 and 2023*, London: WTTC, for Algeria direct and total GDP contributions and employment. OECD, “Morocco,” *OECD Tourism Trends and Policies 2022* for Morocco direct GDP contribution and employment. World Bank, “Tourism: Morocco — Economy Snapshot,” 2024, and WTTC, *Travel & Tourism Economic Impact: Morocco 2023*, for Morocco total contribution. World Bank ST.INT.RCPT.XP.ZS for receipts-to-GDP ratios, accessed March 2026. Jobs-per-arrivals ratios derived from WTTC employment data and World Bank arrival series.

Several observations emerge from Table 3.14. The direct GDP contribution in Algeria (3.5–3.6 per cent) is not negligible, but it reflects principally domestic tourism spending — Algerians holidaying within their own country and the hospitality sector serving them — rather than foreign exchange generation through inbound leisure tourism. When one isolates the internationally comparable dimension, namely receipts as a share of GDP, the gap becomes dramatic: 0.07 per cent for Algeria against approximately 8.0 per cent for Morocco in 2019. Put differently, for every dinar of economic output derived from foreign visitor spending, Algeria generated, Morocco generated roughly 114 times more relative to the size of its economy. The

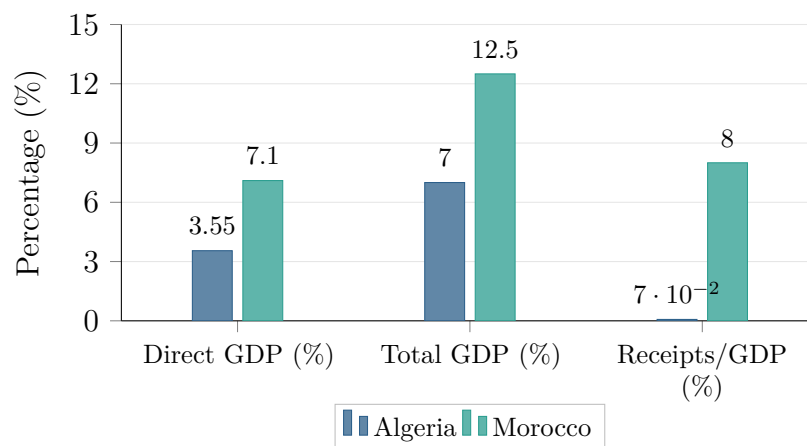


Figure 3.14. Tourism Contribution to GDP: Algeria vs. Morocco (2019)

Source: Same as Table 3.14. Direct GDP uses midpoint of Algeria’s WTTC range (3.55%). Total GDP Algeria uses midpoint of 6.6–7.4% range. Morocco total from WTTC/World Bank 2023.

Receipts/GDP for Algeria: World Bank ST.INT.RCPT.XP.ZS; for Morocco calculated from World Bank receipts and GDP data.

employment dimension shows a similar asymmetry: 565,000 tourism-related jobs in Morocco sustained by 13.11 million arrivals against approximately 300,000 in Algeria sustained by barely 2.37 million. Morocco’s tourism workforce is larger in absolute terms yet supported by a far greater volume of economically productive visits; Algeria’s workforce, by contrast, is predominantly engaged in serving domestic and diaspora flows that generate limited foreign exchange.

The significance of the total-contribution figures should also be noted. The multiplier differential between the two countries — total contribution at roughly 6.6–7.4 per cent for Algeria versus around 12–13 per cent for Morocco — suggests that Morocco’s tourism economy has stronger backward linkages to domestic agriculture, handicraft, and transport sectors. This is consistent with the gastronomy and artisanal economy that Morocco has developed alongside its visitor experience, as discussed in the pillar-by-pillar analysis below.

3.3.2.2 International Competitiveness: The TTDI Benchmark

Beyond domestic performance indicators, an internationally standardised competitiveness assessment provides a useful external validation of the gap identified above. The World Economic Forum’s Travel & Tourism Development Index (TTDI) —

which until 2019 was published under the name Travel & Tourism Competitiveness Index (TTCI) — ranks countries across five broad sub-indices covering enabling environment, travel and tourism policy and enabling conditions, infrastructure, natural and cultural resources, and travel and tourism demand pressure and sustainability.¹

Table 3.15. WEF Travel & Tourism Competitiveness Index (TTCI) sub-scores: Algeria and Morocco (2019)

Sub-index / Pillar	Algeria	Morocco
Overall TTCI rank (out of 140)	105	66
Overall TTCI score (1–7)	3.2	3.9
Business environment	3.8	4.5
Safety and security	5.1	4.7
Health and hygiene	4.9	4.5
Human resources and labour	4.4	4.2
ICT readiness	3.8	4.1
Prioritisation of travel & tourism	3.1	5.2
International openness	2.1	4.4
Price competitiveness	5.1	5.1
Air transport infrastructure	2.6	3.7
Ground and port infrastructure	3.1	3.9
Tourist service infrastructure	2.6	4.7
Natural resources	3.0	4.5
Cultural resources and business	1.4	3.0

Source: World Economic Forum, *The Travel & Tourism Competitiveness Report 2019*, Geneva:

WEF, 2019. Algeria rank is 105th; Morocco rank is 66th, out of 140 economies assessed.

Sub-index scores are on a scale of 1 (lowest) to 7 (highest). Note: the TTCI was rebranded as the TTDI from 2021; the 2019 edition is used here as the last pre-pandemic benchmark year, consistent with the thesis's primary reference period.

The TTCI rankings in Table 3.15 offer an external and standardised confirmation of the pattern that has emerged throughout this chapter. Algeria placed 105th and Morocco 66th among 140 economies in 2019 — a gap of 39 positions that is not distributed evenly across sub-indices. Where the two countries hold compara-

¹World Economic Forum, *Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future*, Geneva: WEF, 2021. Prior editions were titled Travel & Tourism Competitiveness Index (TTCI) and published biennially from 2007 to 2019.

ble natural assets, their scores are correspondingly close. The divergence opens up sharply in sub-indices tied directly to the operational pillars this thesis examines: international openness (2.1 for Algeria, 4.4 for Morocco), tourist service infrastructure (2.6 against 4.7), and government prioritisation of tourism as a policy area (3.1 against 5.2). These are not peripheral dimensions of the index; they are precisely the areas in which sustained strategic commitment — or its absence — shows up in internationally comparable data.

Two findings in Table 3.15 are worth drawing out separately. Algeria scores above Morocco on safety and security (5.1 versus 4.7) and reaches the same mark on price competitiveness (5.1 each). This is an important counter-intuitive result: the gap between the two destinations is not driven by risk or cost, which are among the most commonly cited barriers for North African tourism. Algeria is not priced out of the market, nor is it perceived as dangerous relative to its benchmark. What the index identifies instead is a destination that is poorly connected, under-served in tourist infrastructure, and not yet treated as a strategic priority at the policy level. The cultural resources sub-index score of 1.4 for Algeria is also instructive. It does not reflect a lack of heritage — the earlier sections of this chapter have documented the opposite — but rather a failure to make that heritage accessible, marketed, and integrated into internationally recognised circuits, which is exactly what the WEF methodology is designed to capture.

3.3.2.3 Tourism Investment: Public Commitment and Private Flows

The divergence in performance and competitiveness documented above is ultimately a downstream consequence of a more upstream difference: the volume and consistency of investment directed towards the sector. This dimension is particularly important for a thesis concerned with operational pillar development, since all five pillars — intermediation, accommodation, recreation, food services, and transport — require capital investment to reach the quality and scale necessary to generate competitive tourism products.

Table 3.16 summarises the direct and indirect tourism investment indicators for Algeria and Morocco.

Table 3.16. Direct and indirect tourism investment: Algeria and Morocco (selected years)

Category	Indicator	Algeria	Morocco
Direct	Primary investment vehicle	SDAT 2030 (targets only)	FMDT (sovereign fund)
	Dedicated tourism fund	None operational	FMDT est. 2011
	Plan Azur / resort capital	N/A	\$3.7 bn (2001–2015)
	FDI in tourism (2019, US\$ m.)	Data unavailable	≈820
Indirect	Supplier linkage development	Domestic supply exists; tourism integration weak	Craft, agri-food, transport
	Tourism multiplier (est.)	≈1.9–2.1	≈2.4–2.8
	Induced employment (total est.)	≈550,000	≈13% work-force
	Tourism Satellite Account (TSA)	Not implemented	Partially implemented

Sources: Direct investment — Morocco FMDT and Plan Azur figures: OECD, “Morocco,” *OECD Tourism Trends and Policies 2022*; European Commission, *Morocco: EU Tourism Policy Review*, 2019. Morocco FDI: OECD *Foreign Direct Investment Statistics*, 2021. Algeria SDAT 2030 targets: Ministère du Tourisme et de l’Artisanat algérien, *SDAT 2030*, 2008 (updated 2020); Algeria FDI unavailable in published official statistics. Indirect investment — Tourism multiplier estimates derived from WTTC direct and total GDP contribution figures for both countries (WTTC, *Economic Impact Reports*, 2018–2023): Algeria direct GDP 3.5–3.6%, total 6.6–7.4%, yielding a ratio of approximately 1.9–2.1×; Morocco direct GDP ≈7.1%, total ≈12–13%, yielding ≈2.4–2.8×. Induced employment: WTTC employment series, same reports. Supplier linkage characterisation: OECD (2022) for Morocco; Chettabi & Moali (2025) for Algeria. Algeria’s domestic agricultural and artisanal supply chains exist but are not systematically integrated with the tourism sector, unlike Morocco’s documented linkages across craft, agri-food, and transport.

Note on Algeria’s data gap: The absence of TSA methodology in Algeria means that indirect and induced investment flows cannot be officially quantified; the multiplier and employment figures above are WTTC estimates, not official Algerian statistical outputs. This structural gap is itself a finding relevant to H₁.

Direct investment. Morocco’s approach to direct tourism investment has been institutionally anchored through two complementary instruments. The Fonds Marocain de Développement Touristique (FMDT), established in 2011 as a sovereign

co-investment fund combining public and private capital, provided Morocco with a mechanism for financing large resort developments, heritage site infrastructure, and accommodation upgrades on a rolling basis.¹ Before the FMDT, the Plan Azur programme had already committed approximately 3.7 billion US dollars to the creation of six integrated coastal resort zones between 2001 and 2015, a programme subsequently extended and absorbed within the Vision 2020 strategy, which envisaged a further public and private investment envelope of around 6 billion US dollars.² By 2019, foreign direct investment in Moroccan tourism reached approximately 820 million US dollars, representing 10–12 per cent of total FDI entering the country — a figure that reflects both investor confidence and the clarity of the regulatory and incentive framework Morocco had assembled over two decades. Algeria presents a structural contrast. Its SDAT 2030 framework sets ambitious numerical targets — 250,000 beds and 11 million arrivals by 2030 — but does not, in its published form, attach multi-year budgeted financing to these targets, nor does it establish a dedicated capitalised investment vehicle comparable to the FMDT. Published FDI data disaggregated by tourism are unavailable in Algerian official statistical outputs, a gap that is itself significant.

Indirect investment. The distinction between direct and indirect tourism investment is not merely terminological. Direct investment covers the capital deployed into facilities that tourists use immediately — hotels, airports, resort infrastructure, transport vehicles, and booking platforms. Indirect investment refers to the capital accumulated in the supply chains that serve those facilities: agricultural producers supplying hotel kitchens, artisan workshops supplying souvenir retail networks, local transport operators providing ground transfers, and construction firms maintaining and expanding physical plant. The ratio between total economic contribution and direct economic contribution — the tourism multiplier — captures how effectively each unit of direct activity stimulates additional rounds of domestic spending.

¹OECD. (2022). Morocco. In *OECD Tourism Trends and Policies 2022* (pp. 3–4). OECD Publishing.

²European Commission, *Morocco: EU Tourism Policy Review*, Brussels, 2019.

Derived from the WTTC's direct and total GDP contribution figures, Morocco's tourism multiplier is estimated at approximately 2.4–2.8, meaning that each dirham of direct tourist expenditure generates around 2.4–2.8 dirhams of total economic output once indirect supply-chain and induced income effects are accounted for. Algeria's corresponding multiplier is lower, estimated at approximately 1.9–2.1. This differential is not accidental: it reflects the relative depth of domestic supplier integration in each economy. Morocco's tourism sector draws upon a recognised artisanal economy, a diversified agricultural base, and a maturing hotel construction and fitout industry — all of which function as indirect beneficiaries of tourist expenditure and therefore as recipients of indirect investment growth. Algeria's situation is different. Much of what hotel kitchens serve comes from outside the country rather than from local producers; the souvenir trade operates largely outside certified artisan networks; and ground transport is rarely packaged into inbound tour itineraries in ways that would integrate local operators into the revenue stream. Each of these represents a point at which visitor expenditure flows out of the domestic supply chain rather than circulating through it.¹

The consequence of this multiplier gap is significant. Morocco's 13.11 million arrivals in 2019 supported approximately 13 per cent of the national workforce — direct and indirect employment combined — and generated 9.95 billion US dollars in receipts. Algeria's 2.37 million arrivals, even if expanded to comparable volumes, would not produce equivalent indirect employment and income effects without prior investment in the supply chains that would channel those additional visitor flows into the broader domestic economy. In other words, the investment gap between the two countries is not only a gap in direct capital committed to tourism infrastructure; it is equally a gap in the indirect economic architecture without which direct investment cannot achieve its full multiplier potential.

In sum, the three dimensions examined in this subsection — GDP and employment contribution, international competitiveness ranking, and investment flows —

¹Chettabi, K., & Moali, M. (2025). Tourism in Algeria. *Journal of Wisdom for Research and Studies*, 5(6), 256–272; and OECD (2022) for Morocco's artisanal and agri-food linkages.

converge on the same conclusion: the performance gap between Algeria and Morocco is not only large in absolute terms but is structurally reproduced through differences in institutional capacity, policy continuity, and investment architecture. This macroeconomic context frames the pillar-by-pillar comparison that follows.

3.3.3 Pillar-by-Pillar Comparison

The preceding subsection established the macroeconomic and competitiveness context. The following subsubsections examine each of the five operational pillars individually, drawing on the empirical data gathered in Sections 1 and 2 of this chapter to produce a structured comparison.

3.3.3.1 Tour Organisation and Travel Agencies

Table 3.17 presents the comparison of bed capacities in both countries.

Table 3.17. Hotel bed capacity in Algeria and Morocco (approximate values)

Country	Year	Bed capacity
Algeria	2012	96,898
Algeria	2019	145,526
Algeria	2023	151,052
Morocco	2013	≈200,000
Morocco	2019	≈250,000
Morocco	2021	≈280,000

Sources: Algeria: Ministry of Tourism data as reported by Chettabi & Moali (2025) and tourism investment studies; Morocco: Moroccan Ministry of Tourism statistics as reported by Statista.

On the face of it, Morocco’s formal accommodation supply is about double or triple that of Algeria. However, the gap in usage is even larger. Official tourism observatory statistics for Morocco show that the national average occupancy rate is roughly 40–60 per cent in 2015–2019. In Algeria, the calculated estimate of national average occupancy rate is around 14–15 per cent for the same period. The three to four times greater occupancy rate means that not only is Morocco’s accommodation infrastructure larger in capacity, but generating far higher revenues per bed, as a

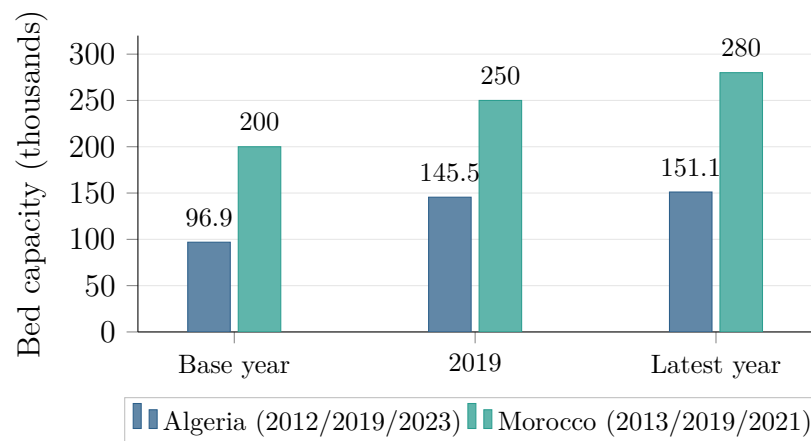


Figure 3.15. Hotel Bed Capacity: Algeria vs. Morocco (approximate values)

Source: Same as Table 3.17. “Base year” = Algeria 2012, Morocco 2013. “Latest year” = Algeria 2023, Morocco 2021. Values in thousands.

result of the combined effects of greater tourist volume, longer average stay and a commercialised tourism product. Using the framework of Smith’s five-component tourism product model introduced in Chapter One, this clearly shows that Morocco’s accommodation pillar is superior not only quantitatively but also qualitatively: as part of a diversified tourism system, its occupancy rate is far higher.

3.3.3.2 Accommodation

The numbers in Table 3.18 reflect the combined performance of the transport, connectivity, and facilitation pillar in both countries.

Table 3.18. International tourist arrivals in Algeria and Morocco (selected years)

Year	Algeria (millions)	Morocco (millions)
2010	2.07	9.75
2015	1.71	10.18
2019	2.37	13.11
2020	0.59	2.80

Source: World Bank ST.INT.ARVL series for Algeria and Morocco, based on UNWTO, accessed March 2026.

During the period under consideration, Morocco consistently had four to six times as many international visitors as Algeria. Another key aspect in which the contrast between the two destinations was evident was the airport structure. While Mo-

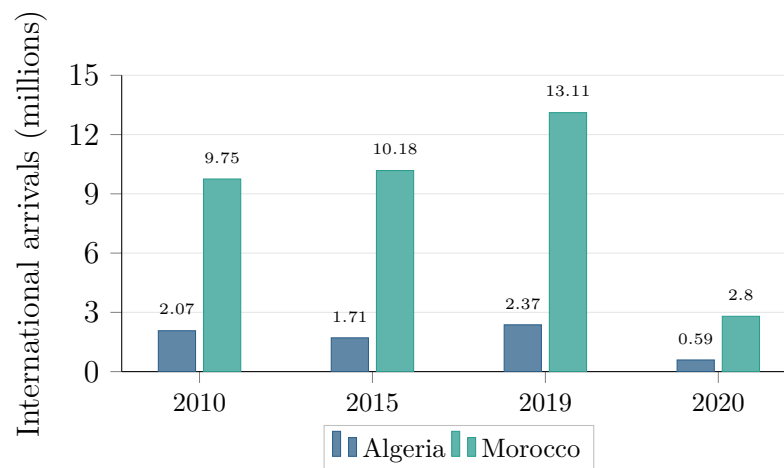


Figure 3.16. International Tourist Arrivals in Algeria and Morocco (selected years)

Source: Same as Table 3.18.

rocco had three leading airports for receiving tourists — Casablanca Mohammed V (10.31 million passengers), Marrakech Menara (6.40 million), and Agadir Al Massira (2.01 million) — handling 18.7 million passengers altogether among the top three, out of a national network total of 25.06 million passengers,¹ Algeria has a number of additional international airports other than the primary one at Houari Boumediene, including Ahmed Ben Bella Airport (Oran), Mohamed Boudiaf Airport (Constantine) and Rabah Bitat Airport (Annaba). These airports have connections primarily with French, Spanish and European destinations, but they handle very few leisure travellers. This means that Algeria is considerably less commercially attractive in terms of its airport network. Without an open skies agreement, the network in Algeria is heavily reliant on Air Algérie and a limited number of full-service carriers from Europe, with no low-cost carrier access. In Morocco, the situation is completely different: the competition between low-cost airlines Ryanair, easyJet, Transavia, and Vueling is constantly bringing down prices and keeping occupancy rates high.² The record 25.06 million total airport passenger figures from Morocco in 2019, which

¹Office National Des Aéroports (ONDA), *Aéroports du Maroc: Trafic Aérien de l'année 2019* (Communiqué de presse no. 01/2020, 22 January 2020). Exact figures: Casablanca Mohammed V: 10,306,293 passengers; Marrakech Menara: 6,396,394; Agadir Al Massira: 2,008,465; national network total: 25,059,840 passengers.

²Meskin, A. H., Derwish, S., & Zarrou, S. (2015). The tourism industry in Algeria. *Revue des Sciences Économiques et de Gestion*, 15, 16–18; Tarfaya, K. (2022). *Ways to promote the tourism sector in Algeria* (Doctoral thesis, Algeria, pp. 88–93); OECD. (2022). Morocco. In *OECD Tourism Trends and Policies 2022*. OECD Publishing, highlighting the importance of the development of low-cost carriers for Morocco's tourism.

increased even further to over 27 million in 2023, show that the movement part of the destination’s tourism system is not only operational but actively expanding. In contrast, in Algeria growth in airport passenger figures did not result in proportional increase in tourist arrivals due to lack of inter-linkages between air connectivity, visa facilitation and tourist intermediaries, preventing efficient conversion of transportation infrastructure into actual tourism demand.

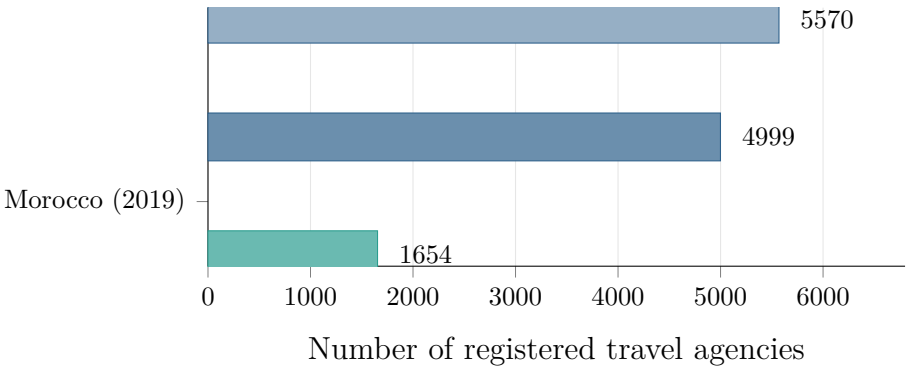
3.3.3.3 Recreation and Tourism Services

The following Table 3.19 summarises available data on travel agencies and reservation enterprises.

Table 3.19. Travel agencies and reservation services in Algeria and Morocco

Country	Year	Agencies	Employment
Algeria	2023	4,999	n.a.
Algeria	2024	5,570	n.a.
Morocco	2019	1,654	≈23,000

Sources: Algeria: Boukhelifa (2023) and Algeria Invest (2025), citing Ministry of Tourism data; Morocco: OECD, “Morocco,” *OECD Tourism Trends and Policies 2022*. Employment data for Algerian agencies are not available from official sources.



Note: Green bar = Morocco; blue bars = Algeria. Darker blue = 2023; lighter blue = 2024.

Figure 3.17. Registered Travel Agencies: Algeria vs. Morocco

Source: Same as Table 3.19. Note: the number of registered agencies does not reflect international integration or product quality.

While, strictly speaking, Algeria has more travel agencies, this statistic is misleading by itself, without any indication of their size, turnover, collaborations with

foreign tour operators or participation in international distribution chains. Morocco's destinations are widely featured in major tour operators' catalogues and even listed on international online booking websites. Algerian destinations have a very limited presence in those channels by comparison.¹ Statistics on the volume of package tours sold, independent traveller arrivals and market coverage are simply not available for neither of the two destinations. For Algeria, the situation is additionally aggravated by the absence of any statistics gathered by Tourism Satellite Accounts and dedicated industry surveys.

3.3.3.4 Food and Catering Services

Available statistics on attraction numbers, heritage site visits and spending by category are scarce for both destinations, especially Algeria. For Morocco, statistics from the Tourism Observatory include breakdowns of tourism spending by category. Site management authorities also report attendance at cultural sites on occasion.² Algeria, on rare occasions, reports visitor numbers at specific UNESCO heritage sites or regional festivals. No systematic statistics, however, have been collected or published.

No direct statistics on recreational activity are available for both destinations. Overnight stays, however, can serve as a proxy for the same, as they indicate how long tourists stayed at accommodation facilities in the destination. Accordingly, the difference between the two destinations is quite noticeable. Algeria recorded 7.69 million overnight stays in tourist accommodation facilities during 2019, when its accommodation infrastructure included 145,500 beds — implying an occupancy rate of roughly 14–15 per cent, indicating a destination where visits tend to be short and limited.³ Meanwhile, in Morocco with roughly 250,000 beds and an even higher

¹Chettabi & Moali, "Tourism in Algeria," and Tarfaya, "Ways to Promote the Tourism Sector in Algeria" discuss the weakness of international promotion and poor presence of Algerian destinations in international distribution chains.

²Reports and surveys produced by the Moroccan Tourism Observatory and Moroccan Ministry of Culture site management offices.

³Calculation made using overnight stays reported in Boutafenouchet et al. (2026) and the bed capacity from Ministry of Tourism statistics.

occupancy rate of 40–60 per cent, a number of overnight stays has been far higher, resulting in 9.95 billion US dollars against just 140 million in Algeria. By comparing overnight stays per bed, the gap between recreation pillars becomes clear: each bed in Morocco attracted many more tourists, who spent considerably more money per overnight stay. Quantitative difference in overnight stays per bed clearly indicates that Morocco succeeded much more in stimulating demand by developing its tourism offer, despite having no natural advantage over Algeria in terms of heritage or landscape.

Table 3.20 presents a comparison of food and catering pillar indicators between Algeria and Morocco, and Figure 3.18 visualises the key magnitudes.

Table 3.20. Food and catering pillar indicators: Algeria vs. Morocco (2019)

Indicator	Algeria	Morocco
International tourism receipts (2019)	US\$140 million	US\$9.95 billion
Estimated F&B share of tourist spending	15–25% (UNWTO norm)	15–25% (UNWTO norm)
Estimated F&B spend (2019)	US\$21–35 million	US\$1.5–2.5 billion
Tourism GDP share (direct, 2019)	≈3.5%	≈7.1%
National gastronomy strategy	No formal programme	ONMT-led since 2010
Dedicated gastronomic tourism products	Informal; no national offer	Cooking schools, food tours, Jemaa el-Fna market
Tourism Satellite Account (TSA)	Not implemented	Partially implemented

Sources: Tourism receipts: World Bank ST.INT.TVLR.CD, accessed March 2026. F&B share: UNWTO standard expenditure breakdown; WTTC, *Travel & Tourism Economic Impact: Morocco 2019*. Tourism GDP share: OECD, “Morocco,” *OECD Tourism Trends and Policies 2022*; WTTC, *Algeria: Economic Impact 2018*. Morocco’s national gastronomy and culinary heritage strategy is coordinated through ONMT; the “ONMT-led since 2010” characterisation follows Tarfaya (2022) and ONMT, *Tourisme au Maroc: Chiffres clés*, 2019, which document the integration of gastronomy into Morocco’s destination promotion since the Vision 2010 strategy. Algeria’s “Informal; no national offer” characterisation reflects Tarfaya (2022) and Chettabi & Moali (2025), who note that while Algeria possesses a rich and regionally varied culinary tradition, it has not yet developed

structured, nationally marketed gastronomic tourism products comparable to Morocco's offer. The F&B spend figures for Algeria are estimated by applying the UNWTO norm to reported receipts and should be treated as indicative.

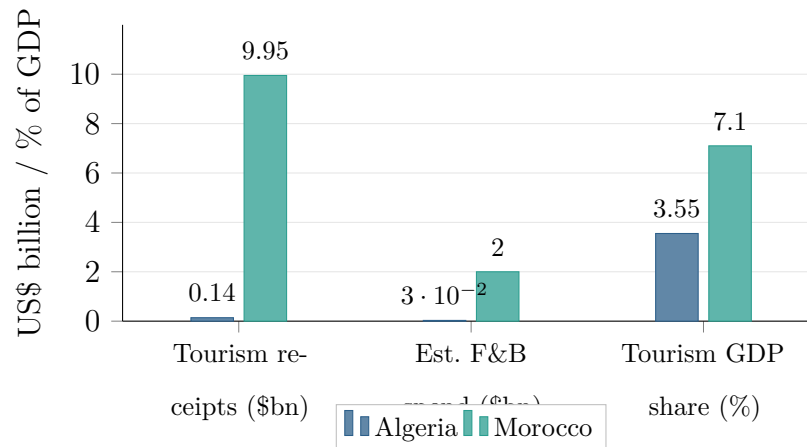


Figure 3.18. Food and Catering Pillar: Algeria vs. Morocco (2019)

Source: World Bank ST.INT.TVLR.CD for receipts; UNWTO norm (15–25%) applied to receipts for F&B spend (midpoint values); WTTC *Algeria: Economic Impact 2018* and OECD “Morocco” *Tourism Trends and Policies 2022* for GDP shares. Algeria F&B spend is indicative only given the absence of a TSA.

3.3.4 Comparative Performance of the Tourism Sector

Table 3.21 presents overnight stays and accommodation utilisation indicators for both countries, and Figure 3.19 visualises the key magnitudes.

The difference in tourist receipts per capita between Algeria (approximately 59 US dollars in 2019) and Morocco (about 760 US dollars in 2019) is quite significant and requires further investigation. In addition to discrepancies in depth of tourism products offered and their pillars, the *structure* of arrivals is an important factor underlying the receipt differential.

Table 3.21. Overnight stays and utilisation indicators: Algeria vs. Morocco (2019)

Indicator	Algeria	Morocco
Overnight stays in tourist accommodation (millions)	7.69	24.4
Hotel bed capacity (thousands)	145.5	250.0
Overnight stays per available bed (annual)	≈ 53	≈ 97
Implied average occupancy rate (%)	14–15%	40–60%
Average international length of stay (nights)	<2	≈ 4
UNESCO World Heritage Sites (count)	7	9
Major annual cultural/arts festivals (count)	<5	>20

Sources: Overnight stays: Boutafenouchet et al. (2026) for Algeria; Statista / Moroccan Ministry of Tourism for Morocco. Bed capacity and occupancy: Ministry of Tourism Algeria and Moroccan Tourism Observatory (Statista). Length of stay: Benmehidi (2016) for Algeria; Moroccan Tourism Observatory annual reports for Morocco. Overnight stays per available bed for Morocco (≈ 97) is a derived figure computed as 24.4 million overnight stays $\div$ 250,000 beds; it does not appear as such in any cited source but is computed from the two primary figures above.

UNESCO site counts: UNESCO World Heritage Centre, accessed March 2026 (Algeria: 7 inscribed properties; Morocco: 9 inscribed properties). Festival counts are indicative estimates based on the ONMT festival calendar and Algerian Ministry of Tourism publications; they are qualitative proxies only.

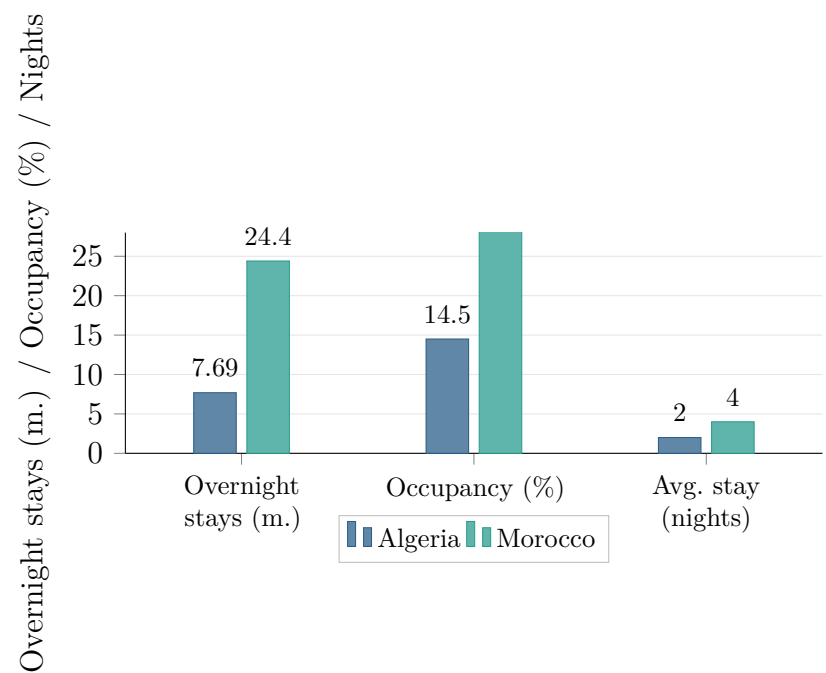


Figure 3.19. Recreation Pillar Indicators: Algeria vs. Morocco (2019)

Source: Boutafenouchet et al. (2026) and Ministry of Tourism Algeria for overnight stays; Moroccan Tourism Observatory (Statista) for occupancy; Benmehidi (2016) and Tourism Observatory annual reports for length of stay. Occupancy shown as midpoint estimate (Algeria 14.5%, Morocco 50%).

3.3.4.1 Morocco: Leisure-Based, Long-Distance Source Markets

France ranks as Morocco's top source country, accounting for over 20 per cent of arrivals, followed by Spain, United Kingdom, Germany, and an increasing contribution from the United States.¹ Common features of these source countries are: geographical proximity to Morocco or good connections to Morocco via air links; relatively high disposable income levels compared to Morocco prices; and a preference for leisure travel with a desire to spend on multiple products during their trip.

Motives for visiting Morocco corroborate this. According to data published by the Tourism Observatory, a clear majority of international tourists (consistently over 85 per cent since 2018 before the outbreak of the pandemic) are coming to Morocco leisure tourists,² with business and visiting friends and relatives (VFR) tourists filling the remainder. By definition, leisure tourists use a lot of tourism services commercially: they spend on hotel accommodations, excursions, dining in restaurants, visiting paid sites, purchasing souvenirs, etc. Therefore, this part of tourist receipts makes up a large portion of tourist expenditures. The share of visitors staying in noncommercial accommodation (relatives or self-catering options) is small. This translates into high receipts from the majority of tourist arrivals.

Morocco is also developing repeat visits to the destination. Ministerial statements in 2025 and 2026 have mentioned an average length of stay at six or seven days, a figure not yet corroborated by any published Tourist Observatory statistical series, and should be taken as indicative of the ongoing positive trend.³ While this number still needs to be confirmed, it does not contradict other findings: Morocco is not

¹Moroccan Tourism Observatory, *Tableau de bord du tourisme: Marchés source*, annual reports (various years); see also OECD, "Morocco," *OECD Tourism Trends and Policies 2022*.

²Moroccan Tourism Observatory, *Tableau de bord du tourisme: Motif du séjour*, annual reports (2018–2019). OECD, "Morocco," *OECD Tourism Trends and Policies 2022* identifies the leisure-based profile of Morocco's inbound tourism flows as the main driver behind high receipts per visit.

³Moroccan Ministry of Tourism, remarks by Minister Fatim-Zahra Ammor in the Moroccan press, April 2026. This figure has not been officially corroborated in Tourist Observatory publications as of the time of writing. The figure of 4 nights from official hotel statistics remains the established benchmark.

only increasing its attractiveness to first-time tourists, but successfully retaining and attracting repeat visitation.

3.3.4.2 Algeria: Diaspora, VFR, and Short-Stay Business Travel

The structure of arrivals in Algeria is markedly different and plays an important role in the low revenue per tourist. According to a recently released industry analysis relying on the GlobalData report, the five top markets for arrivals in Algeria include Tunisia, France, Morocco, Spain, and Italy, with an overwhelming preponderance of interregional traffic.¹ The leadership position of Tunisia, a neighbouring country with extensive border flows for trade, VFR and short-term excursions, suggests that a notable proportion of Algeria's arrivals is of the VFR and transit variety rather than typical leisure tourism.

Diaspora is a particularly important factor here. France, which appears second on the source market list, is home to a large community of Algerian origin — estimates in the literature range from 1.5 to 2 million people.² A large proportion of inbound arrivals from France therefore consists of people returning to visit family, staying in private homes rather than paying for accommodation and organised services. From a statistical standpoint these individuals count as international arrivals; from an economic standpoint their contribution to tourism revenues is minimal.

The point is of paramount importance when it comes to tourism revenues per tourist. Whereas an ordinary diaspora tourist visiting his relatives in Algiers over a two-week period and only spending on public transportation, meals, and family trips will still be recorded as an arrival, a leisure visitor staying for just five days at a luxury riad in Marrakech and going on guided tours as well as eating at local restaurants will be worth several times more in terms of formal tourism revenues. The conclusion is that Algeria's reported arrivals data overestimates its demand for tourism services

¹Hotel Management Network, "Top ten source markets for Algeria," 10 June 2024, citing GlobalData's report "North Africa Destination Tourism."

²Meskin, A. H., Derwish, S., & Zarrou, S. (2015). The tourism industry in Algeria. *Revue des Sciences Économiques et de Gestion*, 15, 14–16. The authors note that the diaspora segment dominates among inbound visitors from France and argue that a substantial fraction of the "international" arrivals generate no revenues for the tourism industry.

compared to what the same number would mean in Morocco's context.

A second important element of arrivals from Algeria is business travel, resulting from Algeria's status as a major economy engaged in numerous trade relationships in the Maghreb, the Arab world, and Europe. While such travellers do spend on classified accommodation and therefore make some contributions to the accommodation pillars, their consumption of recreational services remains limited compared to the leisure tourists. In this way, the combination of diaspora-related VFR and short-term business travel, which is associated with below-average tourism yields, is likely to depress the revenues per tourist figure regardless of the quality of the tourism product.

3.3.4.3 Strategy Implications

While this discussion of sources and types of visitors goes beyond the scope of this chapter, it is important in terms of identifying the strategy for increasing tourism yield. Algeria will not be able to close the gap with Morocco simply by pushing up arrival numbers, since growth built on more diaspora flows and short-stay business traffic would do little to move the receipts needle. What matters is the composition of demand, not just its volume. Reaching segments with no historical connection to Algeria — visitors from the Gulf states, Central Europe, Scandinavia, or East Asia, who would be coming purely for leisure and prepared to spend accordingly — requires prior investment in the very operational pillars examined throughout this chapter. The direction of strategy and the direction of pillar development are therefore inseparable.

3.3.5 Discussion of Results and Hypothesis Testing

The analysis conducted across this chapter follows an analytical-descriptive methodology in which hypotheses serve as structuring instruments rather than as formal conjectures to be confirmed or rejected through significance testing. The findings of Sections 1, 2, and 3 are therefore assessed through a reading of the evidence assem-

bled, with the aim of determining whether the null hypothesis (H_0) can be sustained or whether the alternative hypothesis (H_1) and its sub-hypotheses find support in the comparative evidence.

Assessment of Sub-Hypotheses

The three contextual sub-hypotheses — H_{1a} , H_{1b} , and H_{1c} — all find broad support in the data, and together they constitute the empirical foundation for the central alternative hypothesis. H_{1a} , which posited that Algeria holds significant natural and cultural assets whose contribution to competitiveness remains limited through insufficient valorisation, is substantiated by the combination of seven UNESCO sites, a 1,600 km coastline, and Saharan resources on one side, and receipts of merely 140 million US dollars (0.07% of GDP) and average per-tourist spending of approximately 59 US dollars on the other.¹ The resource endowment is real; the gap between that endowment and its economic conversion is equally real. H_{1b} , which identified the operational pillars as underdeveloped relative to Algeria's resource base, is corroborated throughout the pillar-by-pillar comparison: a 14–15 per cent accommodation occupancy rate against Morocco's 40–60 per cent, 5,570 agencies largely absent from international distribution chains, and an air transport network that generates passenger movements without converting them into leisure arrivals.² H_{1c} , which attributed this underperformance to the absence of a sustained and resourced national tourism strategy, is supported by the contrast between Morocco's three consecutive strategic frameworks — Plan Azur, Vision 2010, Vision 2020 — each backed by dedicated institutional and financial mechanisms, and Algeria's SDAT 2030, whose targets remain aspirational in the absence of a committed investment architecture.³ These

¹World Bank. (2026c). International tourism, receipts (% of GDP) (ST.INT.RCPT.XP.ZS) and international tourism, number of arrivals (ST.INT.ARVL), series for Algeria. Retrieved March 2026 from World Bank Open Data.

²Boukhelifa, M. (2023). Digital tourism in Algeria as a case study. *Journal of Economic and Management Studies*; Statista, "Occupancy rate of rooms in hotels and similar establishments in Morocco from 2015 to 2020," accessed March 2026.

³Chettabi, K., & Moali, M. (2025). Tourism in Algeria: Potential, reality and prospects. *Journal of Wisdom for Research and Studies*, 5(6), 256–272, p. 269; OECD. (2022). Morocco. In *OECD Tourism Trends and Policies 2022* (p. 1). OECD Publishing.

three contextual sub-hypotheses converge and reinforce one another, and together they set up the central alternative hypothesis of this thesis.

Testing the Central Hypotheses: H_0 vs. H_1

That conclusion is encapsulated in the central alternative hypothesis, which this comparative study was principally constructed to address.

H_0 : *Algeria's structural and institutional weaknesses do not significantly limit the tourism sector's ability to compete at regional and international levels.*

H_1 (Alternative Hypothesis): *Despite rich tourism assets, structural and institutional deficiencies persist within Algeria's tourism industry and inhibit its competitiveness at regional and international levels.*

The evidence assembled across all three sections of this chapter bears out H_1 from more than one angle, and provides sufficient grounds to **reject H_0** . The most immediate reading comes from the operational indicators themselves: a national occupancy rate of 14–15 per cent against Morocco's 40–60 per cent, tourism receipts of 140 million US dollars against 9.95 billion, a TTCI ranking of 105th against 66th, and a tourism multiplier estimated at 1.9–2.1 compared to Morocco's 2.4–2.8. Taken individually, any one of these figures might invite alternative explanations; together, they are consistent with a single underlying diagnosis — a sector that has been unable to translate its resource base into an economically integrated product, which is precisely what the null hypothesis contended was not the case.

A second angle concerns capital commitment. Morocco's FMDT provided a concrete, institutionally anchored mechanism for channelling investment into tourism infrastructure on a rolling basis; Algeria has no comparable vehicle. The TSA methodology, which would allow the sector to be measured against international benchmarks, has not been implemented. Disaggregated FDI data for tourism are simply not available in Algerian official statistics, which means that even the scale of private commitment to the sector is unknown. None of these are minor administrative gaps;

they point to a structural situation in which the preconditions for sustained sector development have not been established.

A third and related problem is informational. The statistics that Algerian authorities do publish — aggregate overnight stays, broad bed counts, headline arrivals — tell you that the sector exists but give no basis for evaluating its internal performance. There are no occupancy figures broken down by classification category, no published attendance records for heritage sites, no expenditure breakdown that would allow planners to identify which segments of the offering are generating value and which are not. As Tarfaya has argued, this is not simply a reporting gap; it reflects the absence of the management infrastructure through which a sector learns to improve itself.¹

Crucially, the Moroccan comparator demonstrates that these weaknesses are not a regional inevitability. Morocco and Algeria share a broadly comparable natural and cultural resource base. The divergence in outcomes is therefore not the product of geography or endowment but of institutional choice: the decision to build — or not build — the policy, investment, and measurement infrastructure without which a tourism sector cannot move from potential to performance. This is the central analytical finding of the thesis: H_0 is rejected, and the alternative hypothesis H_1 — supported by all three sub-hypotheses — is confirmed.

Chapter Conclusion

This chapter applied the five-pillar analytical framework developed in Chapters One and Two to a comparative examination of Algeria and Morocco's tourism sectors, drawing on World Bank, WTTC, OECD, and WEF data alongside Algerian and Moroccan official statistics and recent academic literature. What the analysis reveals is not difficult to summarise. Algeria holds a tourism resource base that is, in objective terms, comparable to Morocco's — yet the gap in economic outcomes between the two is not marginal. Receipts of 140 million US dollars against 9.95 bil-

¹Tarfaya, K. (2022). *Ways to promote the tourism sector in Algeria in light of global tourism industry developments* (Doctoral thesis, Algeria, pp. 102–105).

lion, an occupancy rate of 14–15 per cent against 40–60 per cent, and a per-tourist yield of approximately 59 US dollars against 760 US dollars: these figures describe a destination that has not yet found a way to convert what it has into what it earns. The pillar-by-pillar comparison points to where the conversion fails. Both countries have the resource endowment; what separates them is the degree to which that endowment has been built into a functional, internationally connected tourism system. Morocco's agencies sell packages that European tourists actually book; Algeria's agencies largely do not. Morocco's accommodation stock is running at occupancy rates that justify further investment; Algeria's is not. Morocco's air access has been deliberately widened to include low-cost carriers from multiple European markets; Algeria's has not. These are not natural differences — they are the accumulated result of different policy choices. The three contextual sub-hypotheses (H_{1a} – H_{1c}) each find support in the evidence, and together they point to the thesis's central finding: that it is structural and institutional weakness, as captured in the alternative hypothesis H_1 , that prevents Algeria from converting its resource endowment into competitive tourism performance. The null hypothesis H_0 is accordingly rejected. This conclusion carries the empirical weight needed to ground the recommendations set out in the General Conclusion that follows.

General Conclusion

This thesis set out to determine the extent to which Algeria's tourism assets contribute to the development of a competitive tourism industry. The answer that emerges from the comparative study is unambiguous, and it is not comfortable.

Algeria does not lack the raw material. Seven UNESCO World Heritage Sites, a 1,600-kilometre Mediterranean coastline, Saharan landscapes covering the greater part of the national territory, mountain ranges, thermal springs, and a civilisational heritage spanning millennia: the endowment is real, diverse, and by any objective measure comparable to that of Morocco. What the country lacks is the institutional and operational infrastructure that converts endowment into economic output. The evidence assembled in the comparative analysis makes this concrete. In 2019, Algeria generated 140 million US dollars in international tourism receipts — 0.07 per cent of GDP — while Morocco, drawing on a broadly equivalent resource base, generated 9.95 billion US dollars, approximately 8 per cent of GDP. Algeria's accommodation stock operated at an estimated occupancy rate of 14 to 15 per cent; Morocco's at 40 to 60 per cent. Algeria ranked 105th on the World Economic Forum's TTCI; Morocco ranked 66th. The tourism multiplier in Algeria stands at approximately 1.9 to 2.1, against 2.4 to 2.8 in Morocco — a differential that reflects not only investment volume but the depth of domestic supply chain integration that Morocco has built over two decades of sustained policy.

The comparison reveals precisely where the gap is located. It is not in natural resources, where both countries are broadly matched. It is not in price competitiveness or safety, where Algeria actually performs as well as or better than Morocco on WEF sub-indices. The gap sits in three specific areas that the practical study has identified with precision: international openness (TTCI score 2.1 versus 4.4), tourist service infrastructure (2.6 versus 4.7), and the prioritisation of travel and tourism

as a government policy objective (3.1 versus 5.2). Behind each of these scores lies an institutional reality — the absence of Open Skies agreements that would allow low-cost carriers to link Algerian cities to European and Gulf source markets; the absence of a dedicated capitalised investment fund comparable to Morocco's FMDT; and the absence of a Tourism Satellite Account, which is the foundational measurement instrument without which a sector cannot be managed, and without which the very success of any reform effort will remain unmeasurable.

What the Moroccan comparator demonstrates, above all, is that these weaknesses are not a regional condition or a geographic inevitability. They are the product of institutional choices made over time — choices about whether to commit budgeted financing to ambitious targets rather than leaving them aspirational, whether to open air access to competition or protect incumbent carriers, and whether to build the measurement infrastructure that makes evidence-based policy possible. Morocco made one set of choices consistently across three consecutive strategic frameworks spanning two decades. Algeria made a different set, and the tourism sector reflects that difference with numerical precision.

This conclusion carries an implication that extends beyond the sector itself. Algeria is an economy that has long sought to diversify beyond hydrocarbons, and tourism represents one of the rare sectors where diversification could proceed rapidly, drawing on assets that already exist and require no extraction. The Moroccan trajectory shows that a destination starting from a comparable structural position can, within twenty years of sustained and institutionally anchored policy, transform tourism from a marginal foreign-exchange earner into a sector generating nearly ten billion US dollars annually and employing over half a million people directly. The distance between Algeria's current position and that outcome is not predetermined. It is a function of will, institutional design, and the consistency of commitment over time.

Recommendations

The following recommendations are concrete and prioritised.

The results presented in this thesis provide the basis for a set of concrete recommendations, organised according to the five operational pillars outlined above as well as the cross-cutting institutional dimension.

The diagnosis is clear.

These recommendations are intended for Algerian tourism policymakers, planners, and industry stakeholders and take their legitimacy from the comparative case studies presented in Chapter Three.

Recommendation 1 — Transport and Accessibility: Open the Skies

- Negotiate bilateral open-skies agreements with key European and Gulf source markets to enable low-cost carriers to launch direct routes to Algiers, Oran, and Constantine.
- Offer incentive packages (route-development funds, reduced landing fees) to attract new entrants and reduce dependence on Air Algérie's monopoly on international leisure routes.
- Develop secondary international gateways near major tourism assets (Djanet, Tamanrasset) to allow direct access to Saharan destinations without routing through Algiers.
- Streamline visa procedures for leisure travellers from target source markets, with e-visa or visa-on-arrival options to reduce friction at the facilitation stage.

Recommendation 2 — Accommodation: Quality Over Quantity

- Shift investment incentives from bed-count expansion to quality upgrading: direct subsidies and tax benefits toward four- and five-star properties in underserved heritage and Saharan zones.
- Develop a national boutique and heritage accommodation label (riads, ksour, guesthouses, Saharan camps) to capture the authenticity premium and generate higher revenue per bed.

- Introduce mandatory RevPAR and occupancy reporting for classified establishments, feeding into a future Tourism Satellite Account so policy responses can be data-driven.
- Align spatial distribution of new accommodation with destination development priorities, ensuring that UNESCO heritage sites and thermal springs zones are not left underserved.

Recommendation 3 — Tour Organisation and Intermediation: Connect to Global Markets

- Create an international tour-operator partnership programme through ONAT, offering co-marketing funds to European and Gulf operators willing to include Algerian destinations in their catalogues.
- Require and support integration of Algerian travel agencies into global distribution systems (GDS) and major online booking platforms (Booking.com, Expedia) through technical training and API access subsidies.
- Establish a dedicated inbound-tourism agency accreditation tier, with incentives for agencies that demonstrate verifiable inbound package sales and international client arrivals.
- Launch a national digital tourism portal in multiple languages (English, French, Spanish, German) aggregating accommodation, tours, and heritage site information in a single bookable interface.

Recommendation 4 — Recreational Services and Heritage: Animate the Assets

- Develop professionally managed visitor centres, multilingual signage, and certified guide networks at each of Algeria's seven UNESCO World Heritage Sites as a minimum baseline investment.

- Create composite tourism packages combining coastal heritage sites (Tipaza) with beach stays and Saharan itineraries with cultural programming, funded through public-private destination management organisations.
- Establish a national festival and cultural events calendar that deliberately schedules major events in shoulder and off-peak seasons to reduce summer-only concentration of domestic demand.
- Set up a national system of licensed adventure and nature tourism operators for Tassili n'Ajjer and Ahaggar, including safety standards, emergency protocols, and guide training requirements.

Recommendation 5 — Food and Catering: Brand the Culinary Heritage

- Develop an Algerian gastronomic tourism strategy under the Ministry of Tourism, identifying signature regional dishes and experiences (e.g. Saharan hospitality menus, Kabyle mountain cuisine) for international promotion.
- Support the creation of culinary tourism products — cooking classes, market tours, food festivals — in major tourism cities and heritage zones, modelled on the Marrakech food-experience ecosystem.
- Introduce tourism-oriented restaurant certification standards with hygiene, authenticity, and service-quality criteria, linked to preferential inclusion in official destination marketing materials.
- Align hotel and restaurant procurement policies with domestic agricultural supply chains to maximise backward linkages and reduce import leakage from tourism food expenditure.

Recommendation 6 — Institutional Reform: Build the Infrastructure of Knowledge

- Implement a full Tourism Satellite Account (TSA) based on the UNWTO Recommended Methodological Framework to enable GDP contribution, employment, and expenditure tracking comparable to international benchmarks.
- Establish a national Tourism Observatory modelled on Morocco's, publishing quarterly data on arrivals, overnight stays, occupancy by category, average length of stay, and receipts per visitor.
- Mandate systematic visitor-attendance recording at all classified heritage sites and national parks, with annual publication of disaggregated data by nationality, seasonality, and expenditure.
- Invest in tourism-specific human capital through reformed hospitality curricula, language training programmes, and accredited guide certification schemes at national and regional levels.

Recommendation 7 — Policy Coherence: Commit to a Sustained Strategy

- Convert SDAT 2030's strategic objectives into time-bound, budgeted operational programmes with designated ministerial accountability and public annual progress reporting.
- Establish a cross-ministerial tourism coordination council (Transport, Culture, Finance, Interior, Foreign Affairs) to ensure that visa, connectivity, heritage, and investment decisions are aligned with tourism development goals.
- Set quantified, internationally comparable performance targets (arrivals, receipts as % of GDP, receipts per tourist, occupancy rate) with mid-term review mechanisms and independent assessment.
- Guarantee multi-year budget continuity for tourism promotion through ONAT, insulating the institution from annual fiscal volatility, and commission regular independent evaluations of strategy effectiveness.

Recommendation 8 — Sustainable Tourism: Develop Responsibly for the Long Term

- Integrate the principles of sustainable tourism — as defined by UNWTO and the UN Sustainable Development Goals — into all future tourism planning instruments, including the revised SDAT framework, as a non-negotiable cross-cutting requirement rather than an optional add-on.
- Establish environmental carrying capacity assessments for Algeria's most sensitive tourism zones (Tassili n'Ajjer, Ahaggar, Tipaza, coastal marine areas) and enforce visitor flow management mechanisms to prevent irreversible degradation of the natural and cultural assets on which tourism depends.
- Create a national eco-certification label for accommodation, tour operators, and recreational service providers that meet defined sustainability standards, incentivised through preferential inclusion in official marketing and preferential access to the proposed tourism investment fund.
- Design community-based tourism programmes in Saharan and rural Berber communities, ensuring that a substantial portion of tourism revenue is retained locally through direct employment, local procurement, and revenue-sharing mechanisms, in alignment with sustainable development principles.
- Develop a national monitoring framework for sustainable tourism indicators — carbon footprint of accommodation and transport, freshwater consumption per tourist night, community income share, heritage site conservation status — to be integrated into the future Tourism Satellite Account.

Future Research Perspectives

The research agenda is rich indeed.

The central question of this research was answered through a descriptive-analytical and comparative methodology that relied heavily on secondary data sources. While

this methodology is appropriate for a Master's-level study and provided valuable results, it also defined the boundaries of what has been accomplished and indicated what research would need to be conducted to build on them.

Primary Data Collection

One key methodological limitation of this thesis is its use of secondary and aggregate data. One logical step would be conducting a primary data study — based on surveys of tourists visiting Algerian destinations, interviews with tourism industry professionals (hotels, tour operators, heritage managers, transportation companies), and focus group studies with representatives of national and regional tourism administration offices. Primary data would help conduct a detailed assessment of satisfaction levels and expenditure behavior of visitors, which cannot be accomplished using aggregated data employed here.

Wilaya/Region Level Analysis

While conducting the analysis at the national level was essential for this thesis, this approach hid enormous differences across Algeria's 58 wilayas. In this respect, one way forward would be to conduct an analysis using the same five-pillar framework, but applied to individual wilayas or regions (Ghardaïa, Tlemcen, Béjaïa, Tamanrasset) and to compare the pillar development in the selected destinations with each other and with the corresponding destinations in Morocco.

Longitudinal Study

The 2010—2023 period studied in this thesis covers a complete cycle in terms of Algerian and Moroccan tourism development, from growth prior to the pandemic and through the shock caused by the pandemic to partial recovery. A follow-up study over the whole post-pandemic period (2022—2030) would make it possible to assess whether the changes introduced in Algeria, such as visa reform and promotion of desert tourism, are having an impact on tourism pillar performance.

A Broader Comparative Framework

In this thesis, a single country has served as a point of comparison for Algeria. An

extension of the comparison to include other North African countries (Tunisia and Egypt), which have taken a somewhat different path of tourism development, would help better understand which features of Morocco's development model are applicable to Algeria and which are uniquely suited to Morocco. Moreover, a comparative analysis across multiple countries would enable the use of additional methods, such as data envelopment analysis or tourism competitiveness index building, which are not applicable in a two-country comparison.

Tourism and Economic Diversification

The gap is real and huge. While this work has shown how significantly Algeria's tourism development lags behind its potential, it has only touched upon the macroeconomic conditions in which increasing tourism activity would result in GDP and employment effects. A future study combining the five-pillar framework proposed here with tourism satellite accounts and multiplier models would give the policymakers an evidence base needed to justify the allocation of state funds towards tourism development as part of economic diversification.

In conclusion, this thesis has aimed to make a theoretical and empirical contribution to the analysis of the Algerian tourism sector. The gap between Algeria's tourism potential and its current performance is real, wide, and not necessarily predetermined. The Moroccan experience proves that, with the same natural and cultural resources and the right policy, institutions, and investment, one can achieve success. Algeria has everything needed to become like Morocco. All that remains is will, commitment, and strategy.

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