Brunel
UNIVERSITY
WEST LONDON

Aviation Deregulation & its Impact on Moroccan Tourism

By J. Touzni

Dissertation as part requirement of BSc Business & Management Degree

ABSTRACT

The struggle for economic prosperity encourages many developing countries to exploit 'unique industries' to their advantage. One such industry is tourism. In 2006, Morocco became the first African country to sign an 'open skies' agreement with the European Union (EU). This, coupled with its strategic location set on the edge of Africa and only 14km from Europe has put Morocco in a unique position to exploit European tourists' thirst for new destinations as well as providing a link for its European diaspora. This study examines the relationship between the deregulation of the aviation industry and the impact on Moroccan tourism and economic development. In particular it seeks to articulate the likely benefits of airline deregulation for 2nd generation Moroccan diaspora living in the United Kingdom. Qualitative and quantitative research was carried out gaining the views of both 2nd generation Moroccan diaspora living in the United Kingdom and representatives of the government ministries who generated the deregulation policies. The findings support the hypotheses that deregulation of the airline industry in Morocco is an effective approach in increasing visitor frequencies to Morocco. However, deregulation of the airline industry and the subsequent introduction of Low-cost carrier's (LCC's) does not exclusively lead to economic prosperity of the region based solely on increased frequency of travel. The study indicates that Morocco should also endeavour to draw synergies between the type of 'tourist' attracted and their consequential benefits on other economic sectors that play a role in developing GDP. Implications for further research were directed towards considering the generalisation of the findings to Moroccan diaspora outside the United Kingdom and understanding the different factors attributable to non-Moroccan tourists visiting Morocco from Europe.

April 2007

ACKNOWLEDGEMENTS

I would like to take this opportunity to thank those who contributed this thesis.

First, I would like to pay great thanks to Professor Keith Dickson who throughout my time at university has been not only a great inspiration but has given me immense guidance and support in carrying out this work. Thank you. Alongside Keith I would also like to thank Adrian Woods, Costas Andriopoulous & Ahmad El-Gohary who have also been a great influence & granted me the support in developing my own philosophy of thinking.

Second, I would like to thank those who participated in my study who may not have realised their great contribution to this project. This includes the kind participants who completed the questionnaire and the professionals who were kind enough to take time off their busy schedules to be interviewed.

Lastly, I must thank my mum, family and friends for their overwhelming support, patience and encouragement.

In memory of Dad.

April 2007

CONTENTS

LIST OF APPENDICES

LIST OF TABLES

LIST OF CHARTS

LIST OF ILLUSTRATIONS

CHAPTER 1: INTRODUCTION

1.0   Introduction

This chapter outlines the background and rationale behind this research study, and sets out the specific aims and objectives. It also highlights the structure of the dissertation, summarising each chapter.

1.1   Background and Rationale – The Kingdom of Morocco

Morocco, located on the North Western point of Africa and only fourteen kilometres from Europe is strategically located in terms of both export and import of goods and services between Africa and Europe. Its geography is mixed with over three thousand kilometres of coast line becoming more mountainous in the interior (*www.cia.gov/cia/publications/factbook/geos/mo.html, accessed 24/03/07*). With a GDP of US$51billion, Morocco is ranked 58th in the World in terms of GDP value (Appendix 6, World Bank statistics, 1st July 2006).

Illustration 1.0 (adapted from www.cia.gov/cia/publications/factbook/geos/mo.html)
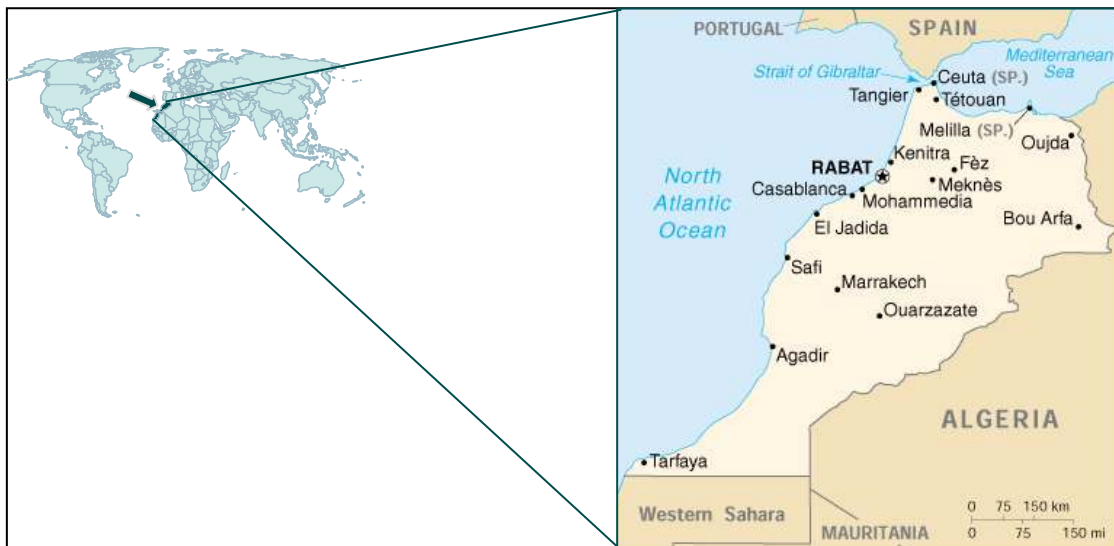
Morocco is confronted by the same problems that afflict most developing countries in terms of achieving sustainable economic growth. The price of oil, international conflicts, and economic cycles have all contributed. Morocco's GDP (*Chart 1.0*) suggests the GDP increasing, however at an erratic rate. Morocco is in a valuable position with good relations with the IMF, the World Bank and the Paris Club, who

support Moroccan economic development and this differentiates it from similar countries in the same developing region.

Chart 1.0 – current GDP and GDP growth 2000 to 2005
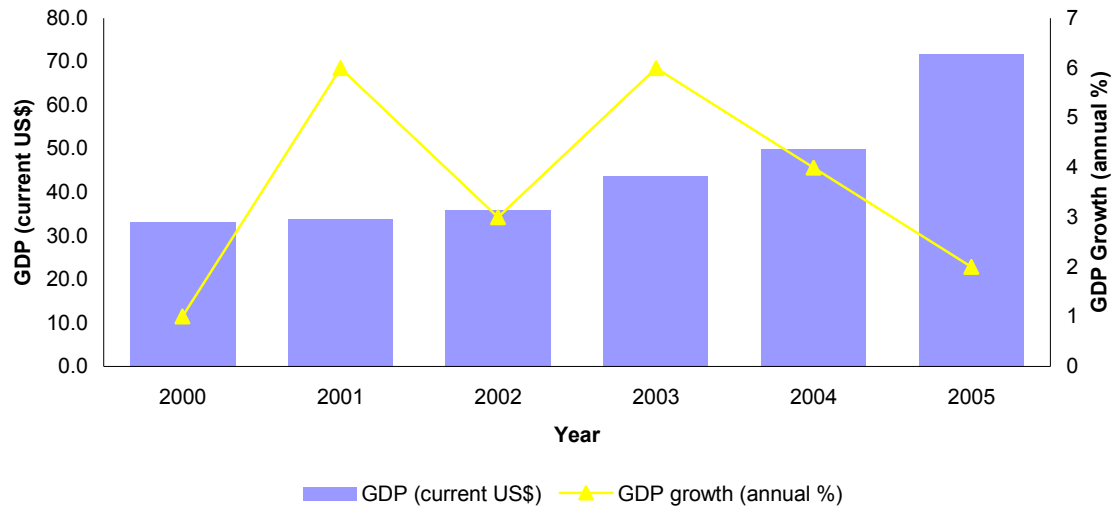
(Adapted from World Bank figures, http://devdata.worldbank.org/data-query, accessed 23/03/07)

The kingdom of Morocco also has consistently strong links with both the United States as well as the European Union and is negotiating several policies which affect trade between Morocco and these two major economic regions in the World.

This study concentrates on a specific policy brought in place to channel the tourism industry initially. Morocco has been receiving a growing number of visitors from Europe; this has been aided by the large migrant diaspora who contribute to both visitor numbers and other economic indicators (such as remittance). Morocco had identified this growth in visitors' pre-2000 and in 2001 took the first steps to create 'vision 2010', which aims to bring ten million visitors to the Kingdom by the year 2010. This determined venture covers a wide spectrum of projects which aim at creating better economic development opportunities for Morocco as a country by concentrating on an industry which has seen tremendous growth across the World (WTO, 2007).

In 2001 a 'Framework agreement' was historically signed between the Kingdom of Morocco and the 'General Confederation of Moroccan Enterprises' (CGEM) which

contained a series of 'Articles' entitled "Tourism; a vision, a challenge, a will". This project's main objective was to allow Morocco to '*appear among the most sought-after destinations all over the World*' (Framework agreement, 2006, p.2). However, no research has been conducted to establish any possible synergies of the policies in place or to understand the implications and benefits which could be acknowledged of such a detailed ambition. The main section of the 'framework agreement' which appears most important in influencing the remainder of the elements is 'Article 9'. This discusses the liberalisation of air transport within the Kingdom and specifically acknowledges the importance of this factor. It clarifies that "*the [various] parties agree that the liberalisation of air transport is one of the best ways to contribute to the implementation of a new tourist policy*" (Framework agreement, 2001, p.5). Therefore as there has been no past research into the success of this 'Article' in increasing visitor numbers to the Kingdom since its initiation (in March 2006), it was deemed to be an interesting and significant subject for investigation.

1.2   Aims & Objectives

A leading aim and a number of hypotheses were developed in order to focus the research. The overall aim was:

> To establish the effectiveness of the deregulation of the air transport system in Morocco in stimulating an increase in visitor frequencies to the Kingdom based on a reduction in the price of return air-fares (and thus achieving its '2010 vision' of ten million tourists).

To fulfil this aim a number of specific objectives were developed into hypotheses;

- Hypothesis 1; 2nd generation Moroccan diaspora in London are more susceptible to touristic traits in their money spending habits
- Hypothesis 2; The Kingdom of Morocco is pursuing the right method (airline deregulation) in attempting to increase visitor numbers for tourism purposes
- Hypothesis 3; An increase in travel frequency of Moroccans living in Europe will lead to an increase in economic imports (such as remittances) as a direct consequence of their increase in trips to Morocco

- Hypothesis 4; The LCC model can alone capture the ten million tourists essential to the success of the '2010 vision'
- Hypothesis 5; Travel frequencies of Moroccans living in Europe to Morocco will increase if return air ticket prices are reduced
- Hypothesis 6; Pricing is the only factor which enables the LCC model to succeed in carrying more passengers between Europe & Morocco

Having addressed the Hypotheses above, this thesis will touch upon the following aspects during the conclusion;

i. Generalisation of results to other developing countries and market segments

ii. The ability of one Low-cost carrier (LCC) to take advantage of such an opportunistic ambition of a single country's tourism potential

iii. Whether air liberalisation is enough as a policy for development

iv. Can the legislators do more in assisting the development of the tourist economy

Testing the hypotheses was introduced to establish the implications of the findings of this dissertation and the aspects above would provide a context for discussion.

1.3   Structure of Dissertation

The following section details the structure of the thesis.

Chapter Two – Literature review

This chapter aims to highlight the main literature of the subject in question. It draws upon theoretical frameworks on economic development and pricing as well as adding depth to the research through the use of past investigations carried out on similar topics.

Chapter Three - Methodology

This chapter presents a detailed rationale of the research methodologies adopted and the philosophical reasoning behind each method. The methods are highlighted and there is an explanation of limitations, ethical issues, sampling techniques and the research process as well as how the data was analysed.

Chapter Four – Findings, Results & Discussion

The findings and results from the primary research are analysed and discussed in the light of relevant theory. The findings are related to the identified research objectives and hypotheses and a variety of evidence is considered alongside. Thus demonstrating the effectiveness of the LCC's on travelling habits of visitors who currently frequent Morocco once a year.

Chapter Five - Conclusion

In this final chapter, conclusions are drawn from both the primary and secondary research and a number of issues highlighted.

CHAPTER 2: LITERATURE REVIEW

This thesis seeks to explore the relationship between tourism and pricing through deregulation of the airline industry, therefore it is vital to consult previous frameworks and research which have sought to identify similar relationships. Although the literature search was not fruitful in terms of identifying [Morocco specific] academic literature, several schools of strategy have sought to distinguish the relationship between economic development and introduction of Low-cost carriers (LCC's) as a result of a deregulated market place.

2.1   Economic Development & The Tourism Industry

The World Tourist Organisation (WTO) states that '*tourism has become one of the world's most important sources of employment*' (WTO website, 2007). This bold statement of success is stabilized by the WTO being commissioned by the United Nations (UN) to organise and explore the success of tourism initiatives. The WTO has been operational since the 1950's.

In 1998, Sinclair (p.4) claimed that many less developed countries (LDC's) now regard tourism as an important and integral part of their economic development strategies. This was not the first time this view was expressed. In 1973, Robert Erbes submitted that '*everything seems to suggest that developing countries look upon tourism consumption as manna from heaven that can provide a solution to all their foreign settlement difficulties*' (Erbes, 1973, p.1 cited Dieke, 2003 pp.273).

More recently however, John Lea (1998) disagrees with the notion that tourism is a phenomenon that only brings benefits to an economy as indicated by the WTO, Erbes' (1973) and Sinclair's (1998) comments. Lea claims that '*international tourism is unbalanced with most power and influence being held by intermediary countries controlling the metropolitan origins of Third World tourists*' (1998, p.6). This courageous statement cannot be diluted as when one traces the ownership of some of the tourist business conglomerates; they are based in either Europe or America.

Therefore, although Erbes observation has gained credibility in academia, the enthusiasm surrounding tourism cannot substantively be attributed to his comments but rather to the industry being 'a highly visible activity' as proposed by Dieke (2003, p.1).

Lea (1998, p.6) further points that it is vital to understand the dynamics of tourism development cynically as '*few of the factors influencing tourism in poor host countries do not relate to the tourist industry alone; most of them are symptomatic of a general condition of underdevelopment*', This analysis undermines the success of the tourism industry in being a catalyst for change, and further discounts the driving force (of tourism) for many countries who seek to utilise it as an 'economic vehicle' for prosperity as the issue disrupting economic development is inbuilt underdevelopment.

However, Lea's research disregards the impact of tourism development as a long term success tool but rather discusses its accomplishment in a shorter span. His research is based on several case studies which elude from the argument that tourism has been proven successful as a regeneration tool in some countries (for examples see Bieger & Wittner, 2006 and Raguraman, 1997) and his book, 'Tourism & development in the Third World' is written with emotionally toned words. Though, having assessed his argument, the author concedes his ideas were re-enforced by the UN in 1979, when the United Nations Environment Program released a complex matrix of advantages and disadvantages of tourism on economies of which three of these focal points were, 'undermining social standards', 'polluting the natural environment' and 'destruction of environment by building hotels' (UN Environmental Program (1979), cited Lea (1998), p.7). Thus providing the fuel for his view of tourism having a destructive impact on the society in which it manifests itself.

Morocco has had a tourism industry historically, though consisting mainly of expatriates and economic migrants returning from Europe to visit family rather than 'new, foreign' tourists so it is challenging to place Lea's (1998) argument in a Moroccan diaspora context. The circumstance surrounding the touristic nature of the migrants living in Europe have been attributed to the 'myth of return' concept from an anthropological perspective (see Ali & Holden, 2006 for a detailed example) rather than solely a touristic objective, however their children (second generation diaspora) have tended to show more foreign tourist like behaviour. Thus;

Hypothesis 1; 2nd generation Moroccan diaspora in London are more susceptible to touristic traits in their money spending habits

2.1.2 'Tourist' & 'Tourism'; A Defined Approach

In 1968 the statistical commission of the United Nations approved that *for statistical purposes the term 'visitor' describes any person visiting a country other than that in which he has his normal place of residence for any reason other than following an occupation remunerated from within the country visited*' (Lickorish, 1994, p.4). This basic understanding of the term 'visitor' held in the similar light as 'tourist', allows the reader to comprehend that once at a foreign country's border-post a traveler is considered a tourist/visitor. Lickorish (1994, p.4) further sub-categorizes the visitor as;

Tourist, i.e. temporary visitor staying at least twenty-four hours in the country visited, the purpose of whose journey can be classified under one of the following headings:
1. *leisure (recreation, holiday, health, study, religion and sport)*
2. *business, family, mission, meeting*

This allows a greater understanding of the term 'tourist' other than previously as a holiday-maker only. The term '*Tourist, embraces a very wide range of products and the tourism market is not a homogenous one but made up of individual segments not simply to identify meaningful groups at which to target the marketing effort but also to identify product needs*' (Lickorish, 1994, p.4).

This unravelling of the simple definition of tourism allows the reader to appreciate the complexity of the industry at the outset and begin to understand the variety of factors that affect tourism development.

2.1.3 The Moroccan Tourist Product & Mass Tourism Trends

Presently, Morocco attracts 6.5 million visitors (http://www.tourisme.gov.ma/english/5-Tourisme-chiffres/1-Chiffres-cles/index.htm). The vast majority of whom (62%) are considered cultural tourists and tend to travel to the cities of Marrakech & Fez. This kind of niche tourism has benefited Morocco in the past on the basis of plentiful tourist receipts; however the current global market trend suggests a move towards seaside tourism (80% of tourists want Sea, Sand and Sun) which is a key aspect of the current mass tourism movement, especially in Europe (http://www.american.edu/TED/moroccotour.htm). This has forced Morocco

to reconsider its tourist product away from the cultural cities and onto the shores providing an opportunity to exploit its numerous beach locations. In pursuing such a strategy Morocco has formed alliances with several tour operators who specialise in standardised package options which enable efficient and more proactive marketing possibilities. However, even by doing so, Morocco appears to still want to attract high spending sustainable market segments that benefit the economy through cultural tourism. Thus:

Hypothesis 2; The Kingdom of Morocco is pursuing the right method (of airline deregulation) in attempting to increase visitor numbers for tourism purposes

2.1.4   Market Segmentation

The tourism market can be segmented into several strands, one of which is the 18-30 niche. This group is categorised by high income and less family related responsibility enabling them to be heavy financial spenders while abroad. Average spend tends to be between £350-£400 per week on holiday (Thomas Cook figures, 2007).

This market is estimated to grow by 6% between 2000 and 2010 (Mintel website, 2007) and have more disposable income than previous generations. As a diverse group, they are becoming more independent in their holiday habits as well as more adventurous by travelling further a field, enjoying a wider spectrum of activities while on holiday (Mintel Website, 2007). The benefits related to such groups have not been fully appreciated by the Moroccan tourism ministry and no research has tried to identify any spending trends on the basis of frequency and reduced air-fares. This thesis attempts to bridge this relationship alongside the effect of cultural heritage in Morocco on the basis that they would be more inclined to travel to the kingdom.

2.1.5   Tourism, Sustainability and Diasporic Tourism

Sustainable tourism is a sub-branch of sustainable development (Cole, 2006) and often concentrates on environmental problems rather than socio-cultural implications. Thus these latter concerns have been given secondary attention (Pearce, 1995) and are often marginalised (Pearce *et al.*, 1998).

According to Viken *et al* (1999) sustainable tourism collections from the 1990's only contained 17% of articles dealing with community issues, thus emphasising the

secondary nature of societal issues in correlation to environmental concerns. Developing a tourist product that co-exists with the region in harmony is essential to the economic benefit tourism can have and if it is to remain successful, the tourism 'product' offered should consider the local region as well as the needs of the travelling tourists (Ayala, 1995). Hence more recently researchers have explored the intellectual knowledge and remittance channels of diaspora outside their home region in order to develop their home region's tourist capabilities (Springer, 2005). Lea, however points out that in understanding the dynamics of tourism and development '*few of the factors influencing tourism in poor host countries relate to the tourist industry alone; most of them are symptomatic of a general condition of underdevelopment*' (1998, p.6). Hence, in terms of sustainability, this research will concentrate on increasing Diasporic tourism in order to contribute to economic development in the most efficient way.

diaspora is a term used to refer to those living outside their country of origin or what they refer to as 'their' country of origin (Falzon, 2003). The majority of research has drawn attention to migration and its opportunities for economic development (Yeoh *et al*., 2002) concentrating on Diasporic travel cycles between economic nations and their less economically stable neighbours such as the relationship between Mexico and the USA (Hondagneu-Sotelo and Ayila, 1997). Research has suggested that diaspora, although living outside their home nation transport their national identity (Falzon, 2003) and construct nationhood both at 'home' and abroad (Van der Veer, 1995). Some countries such as India have attempted to exploit the economic benefits of this segment by viewing them as a source of foreign exchange remittances and national investment sources via a number of economic policies and tax-breaks (Voigt-Graf, 2005). This thesis will incorporate the view that second generation diaspora are more inclined to travel to their parents country of origin on the basis of lower air-fares and also try to explore their economic benefits brought to the region. Thus:

Hypothesis 3; An increase in travel frequency of Moroccans living in Europe will mean an increase in economic imports (such as remittances) as a direct consequence of their increase in trips to Morocco

2.2   Air Transport as a Catalyst for Tourism Development

Evidence from air liberalisation in Europe suggests it greatly improved links between European regions which were previously under-developed, which then saw increased investment, tourism and related employment. The introduction of the low fares model through deregulation aided this development (ELFAA, 2004). Calder (2004) hypothesised a comparable impact if the same Low-cost carrier's (LCC's) who were the brainchild of European deregulation were allowed access to Morocco. He suggested that increased frequency and reduced pricing would increase economic investment and visitor capacity. Calder's main economic was that comparing Spanish air-fares to Morocco identified fares differing by around two-thirds for almost the same journey (2004). Van der Zwan (2006) further pursues the idea that deregulation has increased visitor numbers to regional destinations, claiming that LCC's carry an extra 17% more passengers than legacy carriers (full-service carriers).

Calder's (2004) subjective views are given more academic resonance by research providing statistical coverage of the benefits of LCC's in a deregulated market (Van der Zwan, 2006), increased competition between legacy airlines and the LCC's (Brophy & St.George, 2003) and rapid growth of economies based on deregulation (Damuri & Anas, 2005). Comparing the deregulation of the Moroccan airline industry in parallel to that of the European Union suggests first mover advantages are beneficial to the LCC's who took advantage of the European deregulation policies as they too have begun services to Morocco, including both Ryanair & Easyjet (Davy, 2003). Direct flights between regions have increased both social and economic development as well as tourism income for regions not usually associated with a specific tourism product (ELFAA, 2004). The impact of LCC's in Europe has defeated the thought that the commercial aviation sector was mature as when the LCC's entered the region, new volumes of traffic were generated (SQW, 2003). Passenger growth for the LCC's is forecast to *"increase by around 25% per year for the rest of the decade compared to only 5% for established flag carriers"* (SQW Limited, 2003, p1). This evidences the move that the Kingdom of Morocco has taken in order to grant these LCC's access to Moroccan airports.

Case studies in Europe have suggested that deregulation has impacted positively in specific regions. "*Many believe [it] has given Ireland's capital city a…name as a*

tourist destination" (Siobhan Creaton, 2005, p.256). And this can very soon be the same for several regions in Morocco. The theory that by increasing capacity into a specific geographic region, economic development inevitably ensues is adhered to by Siobhan Creaton who confirms "*Ryanair has…been responsible for fuelling a housing boom in regions of France, with its regular flights spurring thousands of Britons to buy second homes there*", further commenting that "*…estate agents advertise properties for sale saying 'Ryanair 40 minutes'*" (2005, p257). This has been felt by several regions across Europe and studies have suggested a dramatic increase in investment and job creation in these regions (ELFAA, 2004). However, having considered air transport as a catalyst for tourism, it should not be accounted for alone in developing economic advantages. A supplementary to this is the infrastructure development needed also.

Calder (2004) and Creaton (2005) [although subjective texts] are accentuated by research suggesting the strong benefits of increased frequency (Van der Zwan, 2006) and the economic overflows into the regional economies (SQW, 2003). It is difficult to counter-act their argument as these studies are further emphasised by political lobbies which highlight the benefits and corporate social responsibility which the LCC's contribute to purely on the basis of their 'no-frills' product basis (ELFAA, 2004). The major issue which does degrade their argument is the nature of the deregulation in Europe which cannot be fully compared with Morocco purely on the basis of regional size and other 'touristic' variables which could impact on tourism numbers. Thus:

Hypothesis 4; The LCC model can alone capture the ten million tourists essential to the success of the '2010 vision'

Van der Zwan (2006) based on an objective scientific and mathematical approach provides the clearest emphasis for the success of LCC's and he touches upon the tourism aspect within the Mediterranean markets and his conclusion of the success of LCC's is evidenced by recent events post-2001 and the popular readership books of Calder (2004, 2006) and Creaton (2005). Though there are other factors involved such as the acceptance of the local population of new cultural experiences and also the amount of travellers before the influx of the LCC's.

Calder and Creaton maintain their celebration of the LCC model elaborates upon this view, neither of them questions the social impact of the increase of frequency of travel nor do they address the environmental issues of the types of tourism they develop. The ELFAA (2004) covers these latter topics while bringing to light the benefits of 'no-frills, one aircraft-type' business model.

Despite suggesting the drawbacks of the LCC research thus-far conducted, it would be naïve to believe that there is no benefit to increased frequency for the consumer, if it is only for the lower prices. Calder (2004, 2006), Creaton (2005) and SQW (2003) provide logical reasoning and establish a cause-effect relationship between deregulation and economic development.

2.2.1 Concepts of Price Theory in Air Transport & Tourism

Price is a concept determined by equilibrium of demand and supply dynamics (Worthington *et al*., 2005) where the price is set according to the most effective amount of revenue generated while ensuring an appropriate level of demand. Recent research suggests that LCC's through their 'very cheap' prices have stimulated new forms of tourism including that of 'second home/ family based' tourism (Biegera & Wittmerb, 2006). Because tourism has an important transport component, the magnitude of change is determined by price elasticity's (Jenson, 1998 cited Madsen *et al*., 2003) on the basis that price elasticity is inherent in the LCC's business model which become prevalent in deregulated markets (Forsyth, 2006).

2.2.2 Price-Takers & Price-Makers

Previously, the airline industry was categorized through bilateral agreements on the basis of nationalistic borders creating duopolies (the flag carriers of either nation had the only access to travel between the two countries), thus these held similar characteristics to monopolies where the firms became price-makers dictating the demand by controlling the supply dynamics of the market. However deregulation of the industry has allowed numerous LCC's (Low-cost carriers) to enter the fray and compete with the legacy airlines (full-service carrier's) moving the emphasis from a carrier based pricing strategy to a market orientated one.

Aviation liberalisation has been a major contributing factor to the increase in global tourism as it increases traffic streams quantitatively (Forsyth, 2006). It has allowed access into markets for airlines that previously did not operate services within these sectors (LCC's). Thus this proximity to a perfectly competitive market-place characterised by a homogenous product and perfect knowledge between suppliers and consumers led to the concept of price-takers, where the individual airlines do not have control over price, but is determined by market forces and the interaction of the airlines and passengers (Worthington *et al.*, 2005).

Thus the elasticity of demand of a tourism destination and that of air-travel itself are important factors to consider when marketing a new destination for tourism development.

2.2.3 Price Elasticity

Elasticity of demand is attributed when a dependant variable responds to a value change of an independent variable. The elasticity is a measure of the responsiveness of this change (Worthington *et al.*, 2005). It is usually expressed in the following equation:

$$\text{Elasticity of Demand} = \frac{\%\ \text{change in the demand for } good\ A}{\%\ \text{change in an independent variable}}$$

(Adapted from Worthington et al., 2005, p.65)

The outcome of the above equation allows Economists to identify and forecast how a change in price affects the change in demand for a product or service. The elasticity depends however on a number of factors including 'the nature of the good', availability of close substitutes and fraction of income absorbed (Baumol & Blinder, 1991). Leisure airline travel can be described as being price elastic as it doesn't constitute a 'necessity' and can be viewed as a 'luxury good'. Its benefits though are significant when comparing to other types of tourism transport means such as rail and boat travel which often take longer to reach their destination. Tourism itself though is a price elastic sector (Forsyth, 2006). A small percentage change in price leads to a larger sized change in demand on tourism which is contributed to by leisure travel (Pels & Rietveld, 2004). Giving an example clarifies this; if Airline '*a*' currently

charges £100 for a return flight from London Heathrow to Paris Charles De Gaul and can sell 100 tickets, if the price were reduced by £30 to £70, then Airline '*a*' will be able to sell 150 tickets. The difference in the amount of tickets sold is much greater than the difference in the price change. The figure on the left suggests unitary elasticity, which is when a similar change in price leads to a similar change in quantity or frequency. It is important when analysing such price elasticity's to bear in mind the nature of the market competition with respect to frequency and price strategy (Schipper *et al.*, 2006). This kind of perceived 'Perfect competition' based upon a homogenous product, perfect market knowledge and large numbers of buyers and sellers is an Economist's ideal for market structure and benefits of deregulation (Brophy & St. George, 2003). Thus;
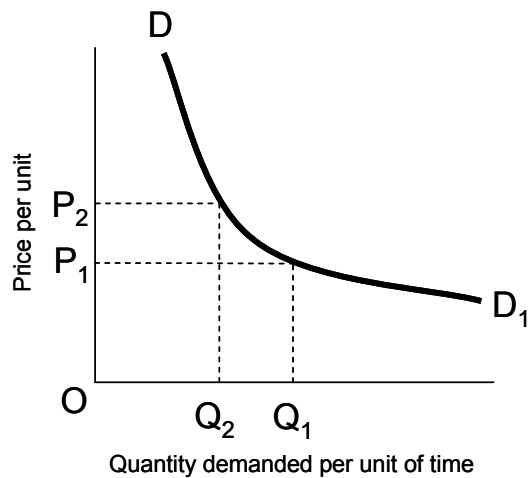
Hypothesis 5; Travel frequencies of Moroccans living in Europe to Morocco will increase if return air ticket prices are reduced

Other than unitary elasticity which literature tends to support for tourism, see Schipper *et al* (2007), Forsyth (2007) and Hong & Harker (1992, cited Adler & Smilaritz, 2007) for detailed examples, there are two other significant types of elasticity; perfect elasticity and perfect in-elasticity. Perfect elasticity is when the price remains the same, however demand changes and perfect in-elasticity is when the quantity demanded remains the same and price changes.

Table 2.1 - Variances between the types of elasticity's (Adapted from Worthington et al., 2005)

Value of E_p	Terminology	Descriptor	Changes in total revenue from sales (TR)
0	Perfectly inelastic	A price change has no effect upon demand	Increased price leads to increased TR (& vice versa)
>0 <1 (i.e. greater than 0, but less than 1)	Relatively inelastic	A % change in price leads to a smaller % change in demand	Increased price leads to increased TR (& vice versa)
1	Unitary elasticity	A % change in price leads to the same % change in demand	Any price change leaves TR constant
>1 <∞ (i.e. greater than 1, but less than infinity)	Relatively elastic	A % change in price leads to a greater % change in demand	Increased price leads to decreased TR (and vice versa)
∞	Perfectly elastic	A small % price change leads to an infinitely large % change in demand	A price rise results in zero TR

2.2.4   Optimum Pricing Strategy – The Equilibrium Price

Brophy and St. George (2003) suggest cost differences arise only from distinctions in price or quality of product (for further detailed examples see Schipper, 2007). Thus, the reduced fares characterised by deregulation result in higher passenger numbers that lead to further efficiencies and therefore lower costs. However the price wars phenomenon which critics of the deregulation of the airline industry predicted (see Busse, 2002 and Ross, 1997, cited in Fournier and Zuehlke, 2003) never prevailed though an example of the significance of the introduction of a LCC is that of Southwest Airline in the USA where this airline's mere intent to enter a market has reduced prices by up to 50% (ELFAA, 2004, and Dresner *at al*., 1996, cited Barbot, 2004). This suggestion that the introduction of increased competition can lead to significantly lower fares leads this research to identify an optimum price for travel between London and Moroccan airports in order to generate an equilibrium price benefiting both the airlines, the tourism industry in Morocco and visitors. Thus;

Hypothesis 6; Pricing is the only factor which enables the LCC model to succeed in carrying more passengers between Europe & Morocco

CHAPTER 3: METHODOLOGY

This chapter puts forward a structured methodological approach in order to achieve the research objectives highlighted in chapter one. This chapter is split into two sections; research approach and research design. The research approach will explain the overall research methodology and justification and the research design will describe the methods used to gather data for this thesis and also a justification of these methods.

3.1 Research Approach

The emphasis of this dissertation is not on whether theory can or cannot satisfy the question of the research but whether the concepts generated by this research have the '*capacity to solve* [the] *human problems* [suggested]' (Powell, 2001, p.884). Therefore, although Saunders *et al* (2006) suggest that there are a number of research approaches which can be utilised depending on the research objectives. This dissertation adopts a pragmatic approach as recommended by Powell (2001). An emphasis is placed upon the construction of statistical (quantitative) data in order to derive an understanding of trends which affect the specific market segment of 18-30 year old tourists living in London (with a family heritage in Morocco) and related Diasporic tourism expenditure.

3.1.1 Justification of Research Approach

'*The pragmatist epistemology stands in contrast to prevailing positivist and anti-positivist views*' (Powell, 2001, p.884) because such research attempts to choose explanations that best produce desired outcomes (Pansiri, 2005). This research therefore follows the triangulation methodology as it is celebrated as the foundation of pragmatism (Teddlie and Tashakkori, 2003).

3.1.2 Research Strategy

The importance of a mixed-method strategy is attached to the point that '*collaboration and networking* [*in tourism*] *are fundamental because not one single method can capture everything*' (Pansiri, 2005, p.203), hence it is gathering momentum within such a tourism-based paradigm (Davies, 2003).

3.1.3   Research Setting

This research is centred on the North African Kingdom of Morocco through a case study approach. It discusses three key issues of airline pricing, tourism policy and implications on Diasporic market segments, all of which have far-reaching consequences. The mixed-method approach is key in understanding the phenomenon from more than one perspective, in order to provide a credible answer to the question at hand (Hussey, 1997).

3.1.4   Research Time Limitations

This research takes a cross-sectional approach to the issues covered rather than a longitudinal study approach. This suits the research objectives as it allows an in-depth analysis and understanding of the phenomenon of the open skies agreement and tourism implications at a specific point of time. However, some secondary research conducted is based upon understanding that longitudinal studies have a historical significance of identifying trends of a period of time. These will also be used in performing the analysis in the thesis.

3.2   Types of Data; Secondary Data (3.2.1)

The secondary data utilised for this project included books, newspapers and a set of limited electronic resources. A concentration was placed upon academic journals to ensure reliability and generalisability of the research findings. Ample secondary data was available providing a basis for the dissertation. However when specific data was searched for, it appeared much harder to locate. Aside from ensuring that the reliability of the data was valid based on the source of publication, further 'filters' were applied so that an in-depth account could be constructed on specialist journals (e.g. journal of hospitality and tourism management). A limit was set as to the amount of research conducted via 'unregulated' internet search engines in order to cement the theoretical application based on credible sources.

Types of Data; Primary Data (3.2.2)

Combining both the quantitative and qualitative approaches is an essential key for this research. This study will use a sequential explanatory mixed methods approach by applying a broad survey to a population and then focusing on identifying trends

within this population and then contextualising this with pricing decision implications.

Sieber (1973) suggests sequential, transformative and concurrent as types of mixed-method approaches. This study will follow the concurrent approach as it enables a convergence of both types of data in order to provide a comprehensive analysis (Creswell, 2003). It also allows both the quantitative and qualitative researches to be conducted in parallel. This follows on from Pansiri's (2005) research framework in which his study called upon the use of mixed-methods techniques in tourism research as a way of enhancing triangulation and understanding of key factors influencing the nature of tourism by compensating for drawbacks attached to each single method (Denzin, 1970).

3.2.3   Access

The researcher was in an advantageous position to instruct this dissertation on the basis that through his own heritage in Morocco and several contacts within the Moroccan community in the United Kingdom, the collecting of data would not be difficult.

This allowed the researcher to empathise with the research participants as well as enhance confidence in the reliability of data through the emergence of trust between researcher and participants. Data triangulation is also important in increasing credibility and trust of an investigation (Alam, 2005). And it is these two types of trust (between researcher and participants and between researcher and data) which ensure credibility of research findings of this dissertation (Easterby-Smith, 2002).

3.3   Questionnaires

'*A questionnaire has been defined as the most efficient way of collecting responses from a large sample prior to quantitative analysis*' (Saunders, 2006, p.355). It represents a carefully compiled sequence in achieving the research objectives.

The questionnaire was derived from a previous research study conducted into the impact of tourism and air-fares following increased competition on the route between London and Aberdeen (SQW, 2003); therefore it was designed with a mixture of

'opinion-led' and 'factual' choices which could be investigated. The questionnaire was available online for respondents and they could take their time in completing it, thus considering the questions at hand (see appendix 4, for a sample questionnaire). Anonymity was strictly adhered by no questions allowing the identification of the individual. This, coupled with the researchers bond with the participants can arguably suggest an increase in accuracy of data generated through this dissertation (Easterby-Smith, 2002).

The questionnaire was distributed via email to participants who shared the following criteria:

- were born in the United Kingdom
- did not spend longer than two months outside the UK other than in Morocco
- had a heritage in Morocco (immediate family and/or extended relatives)
- were aged 18-30 years at completion of the questionnaire
- had travelled to Morocco at least once in the last three years

The questionnaire collection criterion corresponds to Dillman's (2000) suggestion that opinion and behaviour are two types of variables that can be effectively collected.

3.3.1   Questionnaire Design

To ensure that a high number of respondents completed the questionnaire fully, it was simply worded and any technical phraseology was avoided. The questionnaire was separated into a series of themes as identified below:

- Demographic information
- Motives for travel to Morocco
- Travel habits from previous 12 months and 3-years
- Forecast travel plans for next 12 months
- Money spending plans

This structure was deliberate in order to ease the respondent into the questionnaire. All the questions were closed questions. An approach was taken at the beginning of the questionnaire the questions were designed to be single-answered and 'factual' rather than 'opinionated'. The demographic questions were also collected at the

beginning so that they could be used during analysis to explore variances between sub-groups within the 18-30 age group investigated.

In order to explore specific importance of variables the questionnaire had a majority of questions containing 'ranking scales'. Questions 5 – 21 were based on 'ranking scales' enabling the understanding of relative importance of variables when compared.

Only one rating scale adhering to the 'Likert-style' (question 22 [see appendix 4]) was contained within this questionnaire. This was to collect opinion data having completed and reflected upon the questionnaire at hand. This question had four sub-questions which enquired as to how the participant felt towards Morocco having completed the questionnaire.

Aside from these two question types, simple 'quantity questions' were asked in order to collect simplistic demographic data such as age and gender.

In order to avoid confusion for participants and considering the length of the questionnaire, response categories were kept the same.

3.3.2   Questionnaire Sample

The questionnaire was geared to accumulate the different behaviour patterns and variables which affected travel to Morocco and sub-sequent spending patterns of Moroccans aged 18-30 who fulfilled the specific criteria as identified in (section 3.7). To obtain the sample required a 'self-selection method' was utilised thus ensuring the desire of participants in taking part in the research (Saunders *et al*., 2006). This ensured a higher response rate based on interest of subject. Therefore allowing valuable insight into a homogeneous group and incorporating an in-depth account of their behavioural patterns (Easterby-Smith, 2002).

Currently, there are 30,000 Moroccans (born in the UK but with a heritage in Morocco) living in the United Kingdom. Of these, approximately 8,000 are aged 18-30 (*source: office of national statistics*). The researcher made contact with 110 respondents in order to achieve the total sample of 50 participants.

3.3.3 Questionnaire Distribution

The questionnaire was distributed via the internet. Participants were notified of the research through personal email contact and telephone conversations, with the researcher asking participants to complete the questionnaire and pass it on to other possible recipients. This was then followed up by a telephone conversation in order to ensure that the questionnaire was completed and reminding the recipients to complete and then forward to other members of the same market segment. This was justified as the Moroccan segment identified is inter-linked through friendships across the country and youth and young-professionals organisations (Brouwer, 2006). This ensured that the response rate was timely and the sample number needed was collated.

As this method was a combination of email and website formation, the researcher also ensured that before completing the questionnaire, respondents were aware that the questionnaire was anonymous. This was mentioned both during the email and at the top of the web-page where the questionnaire was held. Adherence to Witmer *et al*. (1999) that the data file was saved immediately as soon as completed was also achieved. A special account set up with 'Google Mail' to receive the responses of the participants. However, further email contact to express thanks at completing the questionnaire post-submission was not possible as the questionnaire completion was anonymous.

3.3.4 Pilot Testing

Before the questionnaire was accessible to the participants, pilot testing took place in two phases. Firstly to identify problems with the research questions in order to identify possible ambiguity. Then secondly to ensure that the questionnaire was displayed appropriately on a variety of computer settings (Saunders *et al*., 2006).

This was necessary to improve the content of the questionnaire so that participants did not have any clarity or technical issues which hindered their ability to respond to the questionnaire. The pilot test for the clarity of the questionnaire was conducted with five participants and for the technical issues; the questionnaire was viewed on several web-browsers and system settings. Following this pilot testing session, the questions

were re-defined to ensure they encouraged a response and addressed the research objectives which they aimed to explore.

3.4   Semi-Structured Interviews

There are several types of interview structures as defined by Saunders *et al*. (2006). This research however, incorporates one type of interview. This is in keeping with the mixed-methods approach in order to address themes that could be uncovered during the interview process. The non-standardised method of interviews was selected because it allowed an understanding of relationships between different variables (Saunders *et al*, 2006) and a face-to-face methodology was utilised as it allowed the establishing of personal contact because of the nature of the complex questions being asked (Jankowicz, 2005). This all contributed efficiently to the research questions being analysed by this research study.

The justification for using such a method surrounds the ability of the semi-structured interview to introduce themes and ideas which are then explored – led by the interviewee (Silverman, 2001). This was key so as to ensure that ideas which where newly identified by the interviewee could be progressed into further discussion. The flexible nature of this research method allows this to be seen more as a discussion rather than an interview through the asking of open questions which encourage the interviewee to provide extensive answers revealing attitudes & obtaining facts (Grummit, 1980).

By selecting open-ended semi-structured thematic interviews, the answering of the research objectives becomes clearer based on the findings of the questionnaire. This type of method penetrating requiring further elaboration would not be achievable by any other research method.

A list of five themes were drawn up based on the themes of the questionnaire design (section 3.7.1) which were deemed necessary to explore to achieve the research objectives and an openness was incorporated into the themes so that other issues could be discussed which the researcher may not have identified before. By building a rapport with the interviewee, the researcher hoped to identify additional themes which may not have been explored necessarily.

3.4.1 Interview Sampling

The research objectives highlighted a need to identify specific criteria alongside the quantitative methods conducted. Therefore two important stakeholder organisations in this research were identified. These were:

- The Moroccan government as legislators
- The Moroccan tourist Office as the ministry responsible for legislation and policy development

There was no significant difficulty in accessing the two organisations; however there was a need to clarify and identify the researcher's aims in order to build the trust needed to conduct the interviews with high profile figures in the respective department. The interviewees were selected on the basis of willingness to participate and how important the respective organisation was in tourism development in Morocco.

An interview with the Embassy in London was expected to highlight the economic factors affecting regional development and related research objectives and the interview with the tourism ministry would highlight specific tourism initiatives and policies in place in relation to the questionnaire results.

3.5 Data Analysis

Data collected via the questionnaire method was grouped and analysed via SPSS version 13. This was in order to identify and describe correlations from the questionnaire variables which will then represented by graphs and charts.

The semi-structured interviews would be word processed immediately after the completion of the interview (Saunders *et al*., 2006). This is to ensure that the interview is fresh in order to describe in detail the issues discussed during the interviews as well as highlighting themes which are new to the research.

Content analysis was conducted as it is a structured method which enables easy analysis of qualitative data (Silverman, 2001) and it allows efficient responses to clarifying hypothesis development (Easterby-Smith, 2002).

Secondary data was assessed by price analysis theory and understanding and relating pricing theory as identified during the Literature review.

Due to the various time constraints upon this research a wider sample of questionnaires could not have been distributed. Also, further semi-structured interviews could not be completed due to access difficulties to companies and organisations (such as airlines) which may have been of interest to this research.

3.6   Research Design Ethics

During the research design it was important to consider ethical issues of the participants (Easterby-Smith, 2002). It was also important to highlight that the participants could 'leave' at any time. This openness from the researcher was emphasised by highlighting this on the questionnaire web-page as well as during the semi-structured interviews.

There was no need to take a covert approach to data collection and the researcher ensured that the participants were aware of the research topic (though care was taken not to 'lead' responses). The relationship the researcher had with the questionnaire participants enabled greater trustworthy results to be collected as the researcher was seen as conforming to the market segment being investigated (Silverman, 2001).

During the semi-structured interviews the researcher ensured that persistence was avoided in order to not make the interview stressful for the participant (Sekaran, 2003). It was also important to adhere to Zikmund (2000) ensuring that the researcher remained within the boundaries of the research project as agreed with the participants. With regards to the questionnaire, all participants who took part were assured of their anonymity and all data gathered was used for the sole analysis of this research (Saunders *et al.*, 2006).

No personal data or data which could be used to identify individuals was kept on storage. All other data gathered was compliant with the directive 95/46/EC for data processing and storage (Saunders *et al.*, 2006).

3.7   Potential Issues Arising with Sample

There was no issue in accessing the respondents departments, however actually having the chance to conduct face-to-face interviews proved much more difficult with several hierarchical barriers before accessibility was granted. However, the importance attached to forming a triangulation of data analysis was important in taking this approach (Denzin, 1970).

3.8   Bias & Data Quality

In order to combat the effect of data being undermined by inappropriate strategies the researcher took a number of steps to reduce the risk of 'bias contamination'. This was in accordance with Easterby-smith *et al* (2002) who suggested the importance to ascertain whether if the same measures were selected again, the same results would be yielded. This type of transparency of data would enable confidence in the conclusion being generated (Silverman, 2001).

In order to overcome these issues a number of steps were adhered to in accordance to Saunders *et al* (2006) recommendations:

- *Background knowledge is essential in keeping the interviewee interested. This helped to build credibility and rapport between the participant and researcher.*

As the researcher had an in-depth understanding of the airline industry as well as tourism, it would be very easy to steer the conversation to discuss relevant topics for the research.

- *Although no pre-interview material was given, the researcher ensured that the interviewee was fully aware of the discussions topics and direction.*

The researcher would summarise a list of topics to be discussed through-out the interview at the interviewees ease thereby further providing a point for further research or more in-depth data to be gathered.

- *No control was possible over the location of the interviews, which were both conducted in the respected offices. This may have altered the behaviour of the participants by speaking in 'official terms'.*

By freely conversating with the interviewees it would be possible to create a 'friendship' which would make it easier for the conversation to discuss more fundamental issues to the research.

(Adapted from Saunders et al., 2006, pp.320-321)

3.9   Time Constraints

A large issue affecting this dissertation was the 'time-boundness' of the study. Due to the academic constraints of completing this thesis, a comparison with non-ethnic tourists of the same market segment could have been constructed however this did not materialise. This could have cemented the micro-economic case that tourism is price-elastic regardless of types of market segmentation. A longitudinal approach may have been more appropriate for such a mixed-method methodology as it could have allowed an incorporation of a wider market segment and could have allowed further in-depth research methods to be utilised during the study (Silverman, 2001). This could have provided an observational insight into the chronological evolution of tourism trends amongst the market segment (Pansiri, 2005).

3.9.1   Data Limitations

Data limitations had a negative impact on this thesis. The airlines contacted (Ryanair, Easyjet, British Airways and Royal Air Maroc) all refused to contribute to this study. However, this was anticipated as their pricing structure is of significant market value to their business strategy. Therefore analysis was based on currently held public information and previous knowledge of the traffic routes in question from the author.

Data was not only limited from this perspective. The research is based on a country rather than a city aggregate level which could have some implications on the data (Saunders *et al*., 2006). The predominant population of Moroccans in the United Kingdom are from the north of Morocco. Their travelling habits could have no relation to the travelling habits of Moroccans living in France for example, who are predominantly from the south.

3.10   Lack of Generalisation of Research

Because the research took an in-depth view of a specific market segment within the context of a specific market there are no broad consequences of such a research. The

findings could also not be generalised to large extent to other economies as other deferential factors could have a more dominant impact (Easterby-Smith, 2002).

3.10.1 Sample Size Issues

This study considered and based quantitative statistics on fifty respondents. However, samples of larger absolute size are more likely to be representative of the population for which they are drawn (Saunders *et al*, 2006, p.211).

This research also only considered 2nd generation Moroccans living in London, however if it had considered those of other age groups, the findings could have been more representative and stable in producing a behavioural model (Easterby-Smith, 2002).

The qualitative section aimed to complement the questionnaire through three thematic based interviews with policy representatives. However, it would have been interesting to conduct an interview with the World Tourism Organisation (UNWTO), the organisation responsible for tourism development and to seek their view of air liberalisation and impact on tourism.

3.11 Chapter Summary

This chapter has put forward a series of multi-method strategies which will achieve the research objectives highlighted in chapter one. Considering the political and economic connection to the research topic, the researcher has identified the most effective methods in responding to the research objectives set, bearing in mind the limitations also highlighted.

The following chapter seeks to highlight the key findings of the research as adhered to by this methodology.

CHAPTER 4: FINDINGS, ANALYSIS & DISCUSSION

4.0   Introduction

The rationale and goal of this chapter is to provide the reader with a summary, analysis and graphical illustration of the main results obtained from the research undertaken, including both quantitative and qualitative data. The results have been broken down into two subsections; qualitative and quantitative data analysis. Ten themes [through data analysis] are discussed which shed light on the hypotheses developed at the outset of the research. The sections are segregated as follows:

- Theme 1: British tourism development
- Theme 2: LCC's; A tourism trend catalyst
- Theme 3: Deregulation in Practice - Route analysis
- Theme 4: Mass tourism, culture & sustainability of tourism product
- Theme 5: Unique inclinations of Moroccan & non-Moroccan tourists
- Theme 6: Tourism inclinations affecting policy
- Theme 7: Family is the primary motivation behind 'ritual' travel
- Theme 8: Accommodation preferentials in Morocco
- Theme 9: Optimum pricing strategy utilising tourism figures
- Theme 10: Money spending rituals while in Morocco

4.1   Qualitative Research: Semi-structured Interviews & Thematic Analysis

This section looks into the outcome of the interviews that took place with each of the individual professionals who participated in the study. It aims to grasp each of their opinions and reflections on the implication of tourism on the Kingdom of Morocco. It is important to note that due to the confidentiality agreement and ethical issues identified during the methodology, the respondents will be referred to as follows:

Table 4.1: Interviewee details

Interviewee	Position in organisation
Interviewee #1	Trade & Media Officer – United Kingdom & Ireland
Interviewee #2	Minister Counsellor (Economic Attaché)
Interviewee #3	Regional Director – Tanger-Tetouan region (Morocco)

4.1.1   Content Analysis

The semi-structured interviewees took a thematic approach. This was because unlike structured interviewing techniques, when questions are pre-generated, the researcher

wanted to allow the interviewees to lead the conversation. Thus, during the analysis it would be possible to identify themes which are mentioned a number of times suggesting their importance to the development of tourism in Morocco (Easterby-Smith, 2002).

The chart below (*Chart 4.1*) illustrates the most significant themes that were mentioned during all interviews. The simple content analysis conducted suggests that both micro-economic and macro-economic elements are integral to the sustainability of the 'vision 2010' for Moroccan tourism. The most important element identified by the researcher is the synergetic effects attributed to the tourism industry and how it relates to other influential industries on the Moroccan economy. The justification for content analysis was two-fold;

1. Allowed a comparison between the interviewees
2. Allowed an understanding of the quantitative data from the qualitative perspective

This analysis conformed to Silverman's (2001) suggestion that categories should be created however an emphasis was placed on themes rather than 'key words'.

Chart 4.1: Content analysis of themes identified during qualitative research

37
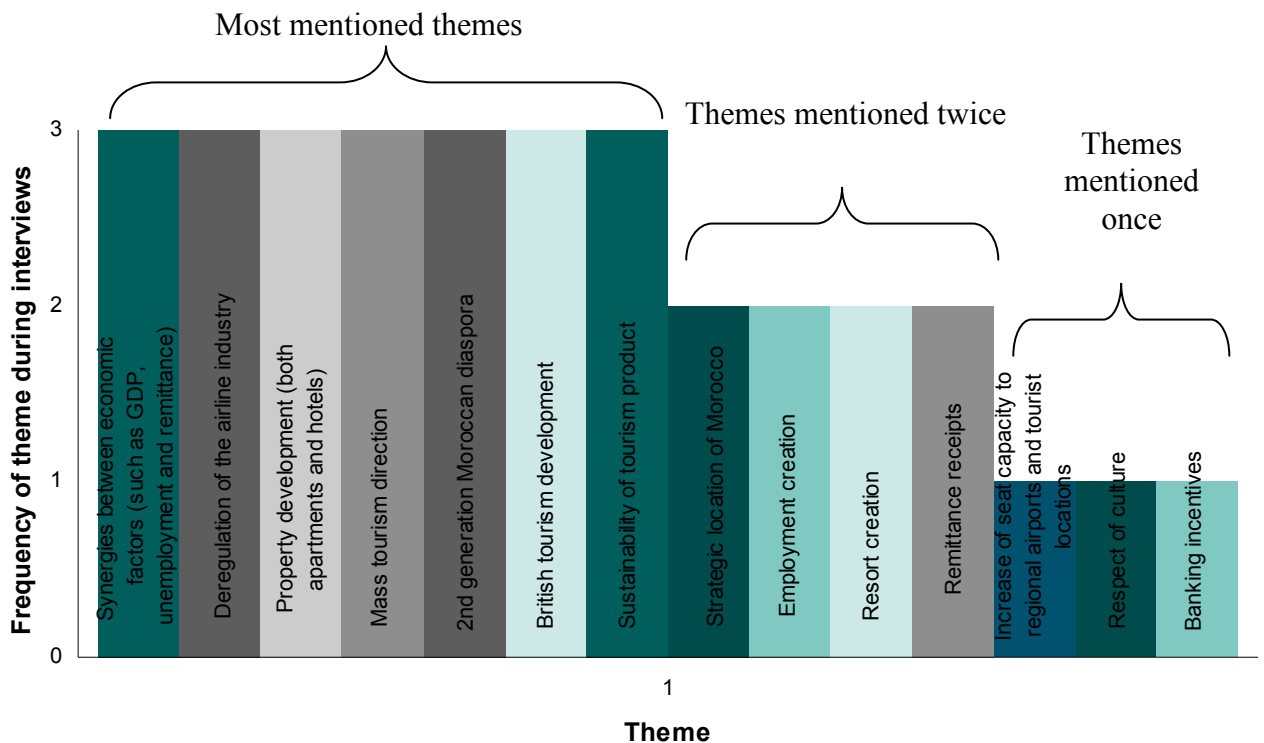
4.1.2   Theme 1:   British Tourism Development

During the discussions about deregulation of the airline industry an indication was maintained that tourism based in the United Kingdom was growing much faster than the rest of Europe.

> "*The British public is interested in Morocco, we [Morocco] are strategically placed very close to the major European cities and with the introduction of low cost airlines we are anticipating and have already realised a large influx of extra visitors especially for short breaks usually associated with intra-European travel*".

(Interviewee #1)

Evidencing that British tourists are indeed seeking destinations outside Europe and the changing trends towards long-weekend visits has influenced their coming to Morocco on the basis of the close proximity (Country Insight-Morocco, Euromonitor, 2006). Thus the resolution to hypothesis *one* [*There is a strong demand for the Moroccan tourist product in the United Kingdom*] became apparent. This hypothesis was further demonstrated by figures from the 'Moroccan Tourism Ministry' which exemplify that British-based tourism has increased +37% from 2005 to 2006 (*Chart 4.2*).

Chart 4.2: Tourist sub-division to Morocco based on country of origin
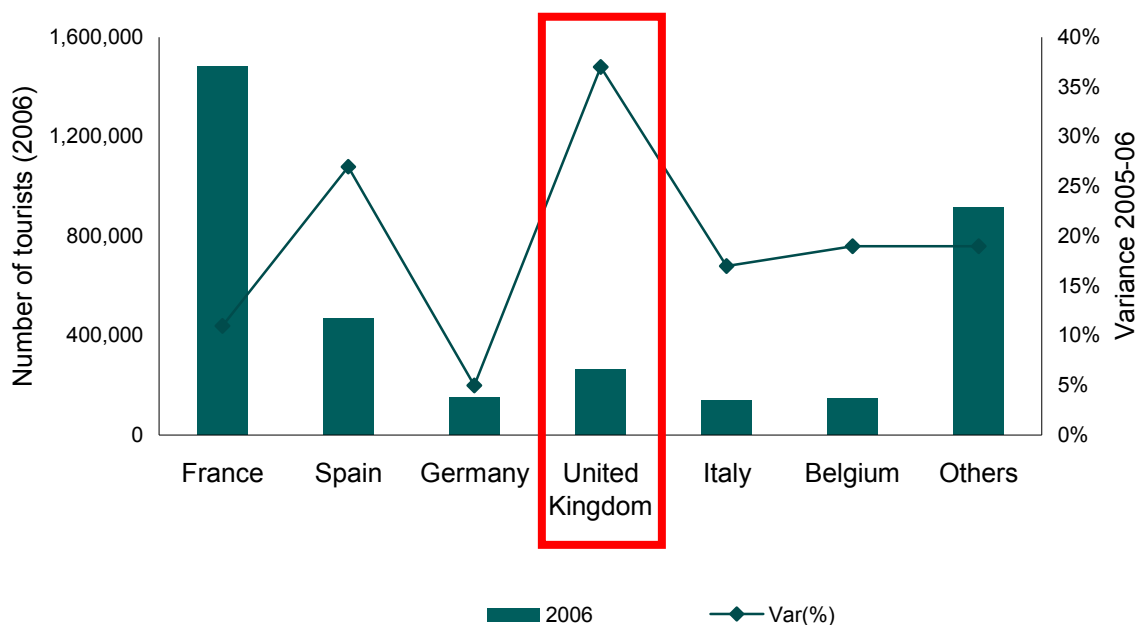
(Adapted from: http://www.tourisme.gov.ma/english/5-Tourisme-chiffres/5-Arrivees-poste-frontieres/arrivees.htm, accessed 14/03/07)

4.1.3   Theme 2:   LCC's; A Tourism Trend Catalyst

The strong growth figure for the UK highlighted in *chart 4.2* has been suggested to be a direct result of the low-cost carriers (LCC's) been a more developed market in the UK (ELFAA, 2004) thus by entering the market for flights between the UK and Morocco, the LCC's already had a consumer-base willing to explore beyond the boundaries of Europe (Calder, 2004).

Deregulation which brought extensive benefits to the European aviation market was seen as a key theoretical generator of increasing access of tourists into Morocco and to make the airline industry more contestable (Brophy & St.George, 2003) and less-expensive to travel in comparison with other destinations favoured by British tourists such as Spain which received 12 million tourist arrivals from the UK in 2005 (http://www.prayforspain.com/general/index5.html, accessed 05/04/07) in contrast to the mere 400,000 or so visitors to Morocco (see *Chart 4.2*). By deregulating the industry Morocco has followed Spain in allowing the market dynamics to dictate what passengers should pay. From the 1970's to the 1990's Spain allowed charter airlines to fly between various European countries and its airports. This led to a sustained boom in net Spanish tourism which brought more fiscal gain to the economy rather than if the Spanish had not done so (Forsyth, 2006). Deregulation was a key theme inherent during the interviews and allowing market dynamics to dictate competition and price of air-travel was emphasised;

> *"Through deregulation we will let the market take control. This will lead to greater frequency and greater price cuts through competition. And this can only be good for the consumer, though maybe not for British Airways and Royal Air Maroc who now have to share the market with airlines like Easyjet…"*
>
> (Interviewee #1)

Through deregulation, Morocco is allowing the market to judge the best price a consumer should pay (Brophy & St.George, 2003) and this adhere to Michael Porter's Diamond theory (1980) where the suggestion is that governments should act as *a challenger and encourage higher levels of competitiveness between firms* (1998, p.681).

4.1.4   Theme 3:   Deregulation in Practice - Route Analysis

In order to assess the relationship between price differentials and the difference between a regulated and a de-regulated market an example of a deregulated route is explained.

The first route to flirt with deregulation in the Moroccan airline industry was London–Marrakech. This route was already popular for cultural tourists from Europe (Country Insight-Morocco, Euromonitor, 2006) and previously only British Airways (BA) and Royal Air Maroc (RAM) flew this route. Together they operated fourteen flights a week and industry discussion suggests a return trip would normally cost £400 ($790, Euro591) for flights alone.

Since the deregulation agreement came into place in March 2006, Ryanair, Easyjet, Atlas-blue and Thomsonfly have all begun flying this sector alongside BA and RAM.

Between these six carriers there are now thirty-five weekly flights to Marrakech from London airports (incl. Heathrow, Gatwick and Luton). An analysis on the return flight prices show a significant difference in the prices charged by the LCC's and those of BA and RAM (Legacy carriers). Four test travel dates were compared. The average BA return price was £172, the average RAM return price was £185. This is in comparison to an average return fare of £105 for Ryanair. Although Ryanair fly from the secondary airport of London Luton instead of London Gatwick (which both RAM and BA fly from), the price difference is still on average 41% less than both BA and RAM. However, if an analysis based on like-for-like airport basis a comparison between Easyjet and BA suggests the latter's fares still a significant 23% more expensive (both fly from Gatwick).

Although data has been restricted so a comparison cannot be made according to passenger figures on a monthly basis for the London-Marrakech route, the understanding that six airlines now serve this route post-deregulation, an increase of 250% on departures per week, is testimony that deregulation can increase capacity on a route and reduce the price of the return air-fare through increased competitiveness in the market (Barrett, 1997, Hooper, 1997 and Pels & Rietveld, 2004 for a number of further examples). From the analysis it is reasonable to establish that Marrakech is now more easily accessible and affordable to passengers travelling from London. Marrakech is a route which already had consistent traffic stream from London. Another route which is 'piloting' the deregulation agreement is London to Fez.

Pre-deregulation only BA served this route, operating a twice weekly service from London Heathrow (RAM only serve via Casablanca). In late 2006 Ryanair began serving Fez from London Luton. Once again four dates were analysed and Ryanair was consistently 48% cheaper than BA over the four dates selected. Even from a secondary airport like London Luton, these are significant savings for passengers, with the maximum difference being a saving of £138 on a BA fare of £272.

What the cases of both London-Marrakech and London-Fez suggest is that deregulation has encouraged the low-cost carriers to begin services to the respective airports and this has increased capacity on every route LCC's join (ELFAA, 2004).

4.1.5   Theme 4:   Mass Tourism, Culture & Sustainability of Tourism Product

By assigning an ambitious statistical target of 10 million tourists by 2010, Morocco needs to concentrate on Beach tourism which already attracts over half the total number of tourists to Morocco (*see tablet 4.2 below*) because it is a growing industry for European tourists (Bieger & Wittmer, 2006) and especially for British tourists (Graham, 2006).

Table 4.2: Travel Retail Sales by Destination

%value breakdown 2000-2005	2000	2001	2002	2003	2004	2005
travel retail sales by destination						
Beach	50.7	50.6	50.5	50.5	50.4	50.4
Countryside	0.4	0.5	0.6	0.7	0.7	0.8
Mountain	2.1	2.3	2.3	2.4	2.5	2.6
Culture	31.9	31.9	31.8	31.8	31.7	31.6
Other destinations	14.8	14.8	14.8	14.6	14.7	14.6

source: official statistics (Office des changes www.oc.gov.ma),
(Ministere des Statistiques www.finances.gov.ma),
(Mission Economique Ambassade de France Casablanca www.missionneco.org/ma).
(Adapted from Country Insight-Morocco, Euromonitor, 2006, p.55)

However, although the drive is aimed towards 'mass' beach tourism, the stereotype of unprotected cultural havens is keenly maintained;

> *"Even the mass tourists we aim at are families, much like the Moroccan families living abroad. So when they come they have family values. We don't want to invite those corporate*

parties who want to trash our beautiful cities. We want them to appreciate all the effort we have done to make sure they have a good time. This is also important for us. Cultural understandings. The social effects of tourism are important also for us".

(Interviewee #3)

Morocco appears to have underpinned its '2010 vision' with both cultural and environmental sustainability acknowledgement. Striking a balance between tourism sustainability and cultural sustainability is being considered at an early stage. This is of importance for long-term planning (Cole, 2006). Its methodology was summed up by one interviewee:

"In Saidia we want to continue developing family based accommodation. Those that have already invested in property there have already created links with the community and their children; this could be the beginning of a better kind of social integration and understanding between Moroccan and European Children"

(Interviewee #1)

This forward thinking social integration of culture and society shows a strategy which seeks to explore beyond the tourism structure and into an integration of host and guest; a sign that suggests tourism has far-reaching implications beyond just the traditional basic experiences of mass-tourism.

Clearly there is a strong demand for tourism in Morocco from the UK. Morocco is trying to foster and influence this market shift in order to reap the benefits further beyond just the tourism industry. The view that it (tourism) could lead to a bond between cultures supports the notion that mass tourism of cultural appreciation is one segment which benefits not just Morocco as host country but guests who realize this relationship.

4.1.6   Theme 5:   Unique Inclinations of Moroccan & Non-Moroccan Tourists

The '2010 vision' does not distinguish between market segments based on nationality. The tourism product is universal incorporating both Moroccan and non-Moroccan tourists as indicated by one interviewee;

"...the framework agreement is a long term general vision. It is for all tourists and Moroccans living abroad actually travel into Morocco as tourists, they are not differentiated in anyway from other tourists so they too are covered by the initiatives put forward".

(Interviewee #3)

This view is contextualised by the almost identical travel patterns by Moroccan and non-Moroccans arriving in Morocco as per *Chart 4.3* below.

Chart 4.3: Moroccan versus non-Moroccan arrival statistics 2001-2006
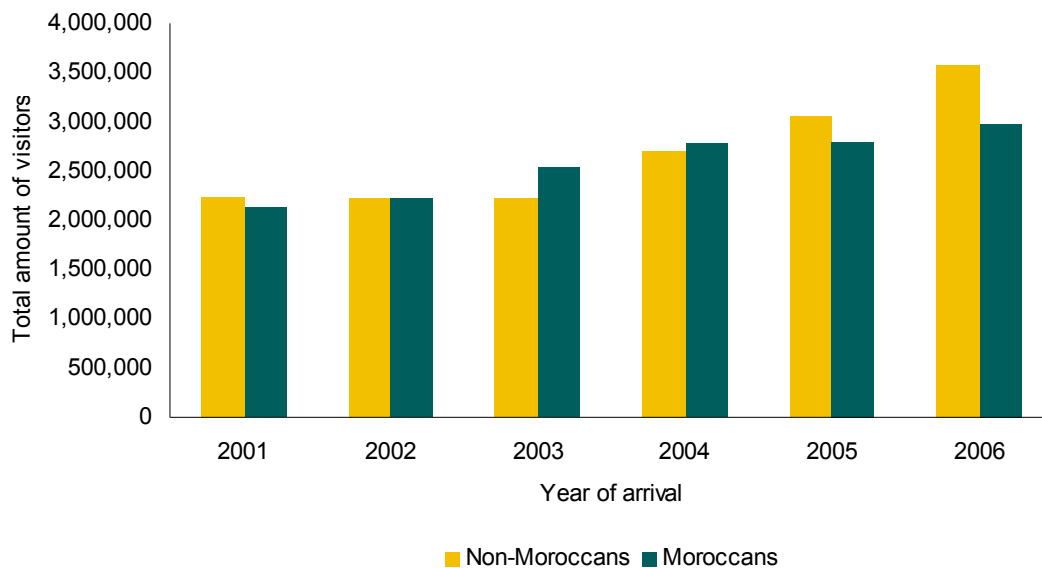
(Adapted from: http://www.tourisme.gov.ma/english/5-Tourisme-chiffres/5-Arrivees-poste-frontieres/arrivees.htm, accessed 20/03/07)

Chart 4.3 suggests similar tendencies between Moroccan and non-Moroccan visitors to Morocco, however one interviewee tried to explain some differences as well as similarities between the segments;

> "*We have incorporated them* [Moroccans] *into our plans. They are very important to us, their remittances have increased over the last few years and this is very important for our development as a country. We also value their skills in contributing to their local economy. At the end of the day they are Moroccans too, but also tourists…Moroccans…born abroad have followed the traits of their colleagues abroad. You want resorts and you want to have a holiday. So for you we want to incorporate this too. It is not just about family but it is about having a holiday too and bringing your friends. This is also important. Sustainability*".
>
> (Interviewee #2)

However for another interviewee the reason for unilaterally in the framework is the factor of the LCC's decision to consider flying to Morocco…

> "*Easyjet underestimated us in 2002 and then re-tracked and came a year earlier than planned in 2006. This is proof we are doing some really good things in Morocco. Both these airlines could be flying to Tangiers the next busiest airport in Morocco by 2008 and this will be great for tourists both Moroccan and non-Moroccans*"
>
> (Interviewee #1)

4.1.7   Theme 6:   Tourism Inclinations Affecting Policy

The suggestion that Moroccan tourists might contribute greatly through secondary means alongside pleasing the tourism statisticians runs parallel to the thought that they would be the longer-term benefactors of 'open tourism' policy, as one interviewee states;

> "*Cheaper air tickers, cheaper hotels, better quality of holiday, better facilities…In the longer term part of the framework agreement will be geared towards Moroccans living abroad... We realise…the benefits of the money which they spend in Morocco*".
>
> (Interviewee #3)

It is evident that Moroccan tourists contribute to the local economy through means other than just tourism numbers, therefore their inclusion in the '2010 vision' is vital due to wider synergetic implications for economic development.

4.2   Quantitative Research; 2nd Generation Moroccan diaspora in the UK

From the 50 questionnaires, fundamental results were calculated using a combination of 'SPSS 13.0' and 'Microsoft Excel' to form graphs and statistical data in order to analyse accordingly. Although the main information is highlighted in the remainder of this chapter, a number of matrix tables are situated in the Appendices (*Appendix 5*) which summarise all data obtained from the questionnaire (*Appendix 4*).

4.2.1   Demographics of the Market Segment

The demographic data obtained highlights the categorization of the market segment being investigated. *Chart 4.4* demonstrates that the largest amount of respondents incorporated into this research were from the '21-23' age set.

Chart 4.4: Breakdown of sample population based on age
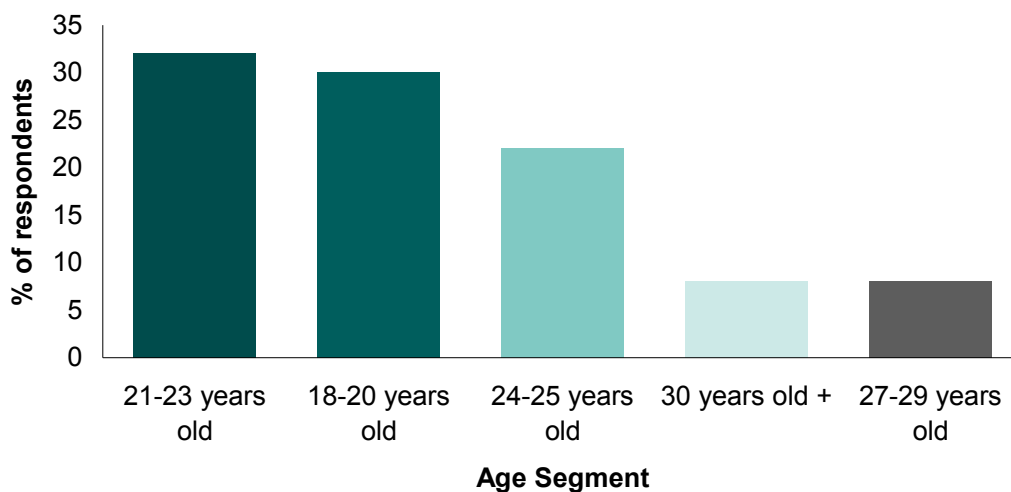
A satisfactory range of age groups was achieved primarily within the 18-26 segment where 84% of the sample originated from. The response sample also achieved a

beneficial range of responses from both females (58%) and males (42%) as indicated by the breakdown in *table 4.1* below.

Table 4.3: Breakdown of age vs. gender

		age					
		18-20 years old	21-23 years old	24-26 years old	27-29 years old	30 years old	**TOTAL**
		Count	Count	Count	Count	Count	
Gender	Male	2	5	8	3	3	**21**
	Female	13	11	3	1	1	**29**

The emphasis for this study wasn't to base data analysis on gender, but rather on age and socio-economic status as indicated in *chart 4.5* below.

Chart 4.5: socio-economic status of respondents
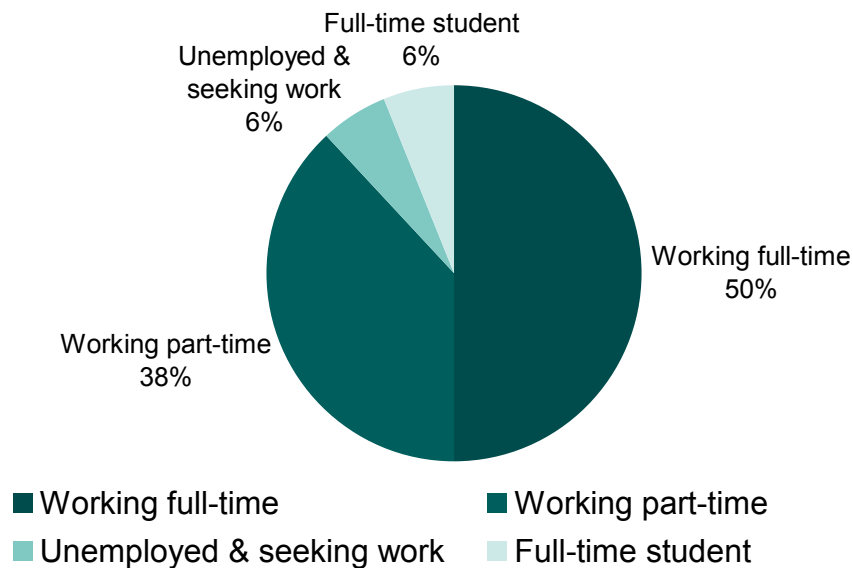
This was important in determining the direction of the project in relation to lifestyle and culture, especially through the perception that tourism is perceived as a luxury good (service), therefore it is more susceptible to income elasticity factors (Croes & Vanegas (2005). The majority of the respondents indicated they either were working full-time (50%) or students (38%). This was expected from the sample group as it was expected that the respondents were either at university or beginning their careers.

Having a sample covering those unemployed (6%) and those working part-time (6%) was a benefit to the analysis as it allowed a comparison of socio-economic status as an influence on travel habits. During the analysis, segmentation was based on the annual income of respondents (see *Chart 4.6*) as a possible factor affecting 'price-strategy' for the industry.

Chart 4.6: Annual income of respondent

The benefit of obtaining socio-economic and annual income data was that these two dynamics complement each other.

4.2.2 Factors Motivating Travel Decisions

During the qualitative data collection (semi-structured interviews) a suggestion emerged that second generation Moroccans did not visit Morocco necessarily for family related reasons as indicated by Ali & Holden (2006). However, the quantitative data (the questionnaire) suggested otherwise. The key to understanding the importance of this factor is that the questionnaire was only delivered to 2nd generation Moroccan diaspora with family (either extended or nuclear) in Morocco. Their major response was that family was a significant driver to travelling to Morocco on an annual basis.

4.2.3   Theme 7:   Family is the Primary Motivation Behind 'Ritual' Travel

'Family' came top of the list with 58% of respondents and 'business' was only ticked by 2% supporting the hypothesis of the researcher that the primary motive for the 2nd generation Moroccans living in the United Kingdom was due to family connections (see *Chart 4.7*).

Chart 4.7: Primary motive for travel to Morocco
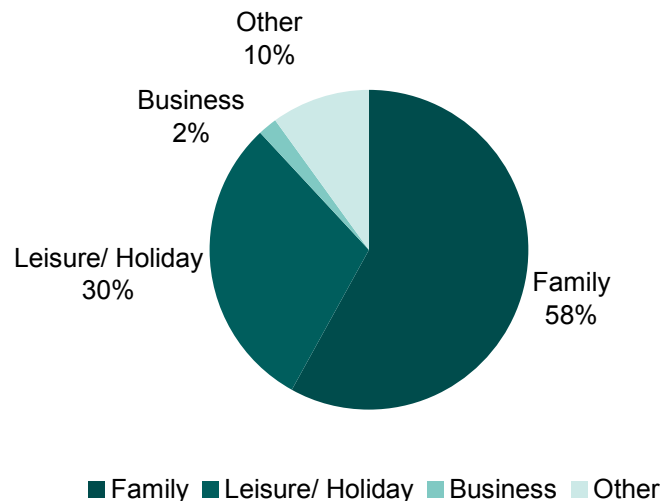
This implies the compelling influence of family as suggested by Ali & Holden (2006). Despite noting the influence of family on travelling to Morocco, the inter-relation between travelling to Morocco for family or for vacation should not be diluted. Cherti (2007) suggests the 'summer rituals' of these second generation diaspora is an exemplification of the particular relationship between these two factors.

4.2.3.1 Factors Shaping Travel Routines to Morocco

In order to validate the understanding that price of travel is a significant factor in determining travel frequency to Morocco, respondents were questioned as to the factor they felt most influenced their choice. *Chart 4.8* below illustrates through an 'arithmetic mean' test how important five selected factors were, including price. It was aimed that the research would identify how price compared to other factors deemed important to the travelling experience.

Chart 4.8: Arithmetic Mean Calculation – factors influencing travel habits
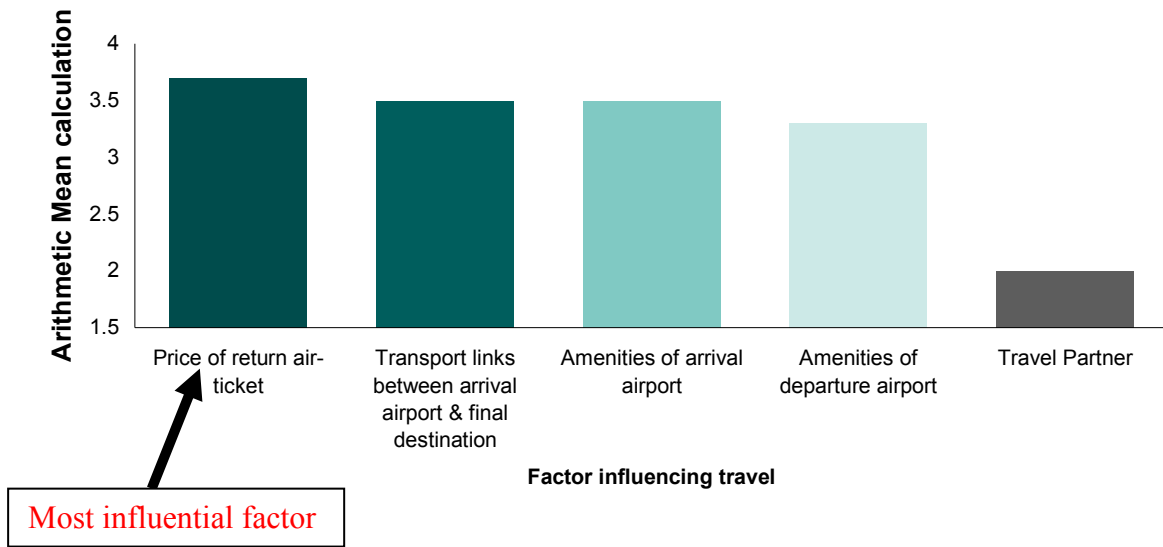
The breakdown supports the theory that _the overall price of the round trip_ [is what] _matters to passengers_ (McHardy & Trotter, 2005, p.3).

Chart 4.8 indicates however that the 'arrival airport' as well as 'the proximity to final destination' were also crucial factors alongside the pricing of the 'return air-fare'. This supports Bruinsma _et al_ (2000) in hypothesising that good accessibility to airports by both road and rail infrastructure is an important element in deciding to use the particular airport from a passenger's viewpoint. The 'arithmetic mean' test was selected to assess the data as it is most appropriate statistics tool when summarising a measure of exposure to risk of a sample (Krump, 1998).

An intriguing result indicated by _Chart 4.8_ is the suggestion that the 'amenities of the departure airport' are not such a significant factor affecting travel rituals, however by using SPSS to 'weigh' the data according to 'proposed travel during the next twelve months', 60% of the respondents suggested they would like their flight to Morocco to depart from London Heathrow Airport. Two reasons could be proposed in theorising this phenomenon:

1. The networked-hub nature of London Heathrow airport and its strong airline-routes with the rest of the UK where potential Moroccan diaspora live (Bruinsma, 2000)

2. The strong surface-transport links from London Heathrow airport to central London and the convenience of second generation Moroccan diaspora living in the Capital (Mason, 2000).

Alamdari & Fagan (2004) suggest that for LCC's to ensure maximum profitability they should adhere to the original LCC model of secondary airport usage (such as London Luton or London Stansted). London Heathrow is still the most connected and easiest airport to travel to central London. However, if the price of the return air ticket is the more important than overall duration of journey, Heathrow airport may not be the ideal departure airport within the London region.

Chart 4.9: Most desired Airport to depart from
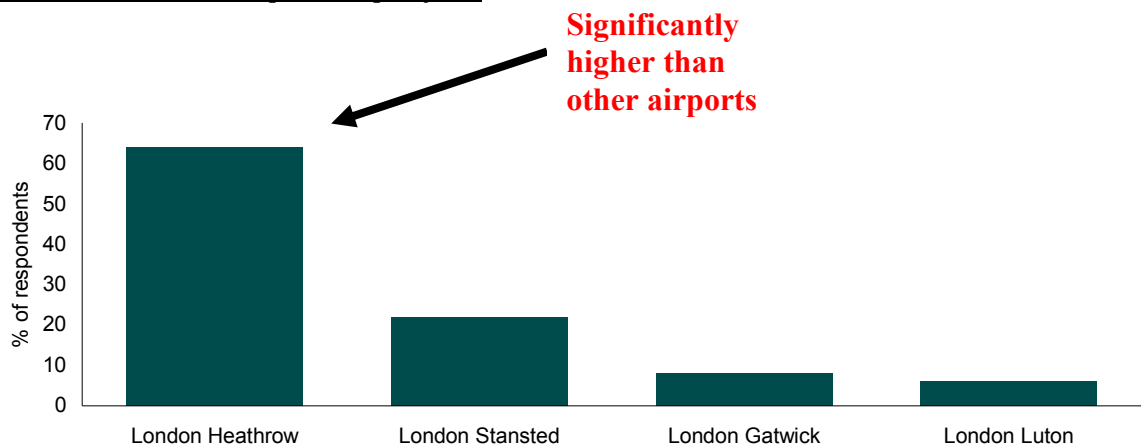
Although statistical evidence and quantitative data supports the hypothesis that price is the prevailing factor in determining travel to Morocco, it is evident from the chart above that it is not the sole factor in determining travel. The departure airport, arrival airport and proximity of arrival airport to final destination are all contributors to the decision process.

4.2.4 Theme 8: Accommodation Preferentials in Morocco

An overwhelming majority of respondents (84%) suggested their preference dwelling being their parents or extended-family's home. This corresponds to the findings of Ali & Holden (2006) that through the 'myth of return' theory, first generation diaspora try to influence their offspring in adopting their own travelling rituals on the basis that by building a home in Morocco, the second generation diaspora would be more inclined to visit. A 'second-quartile' median test was carried out as according to Kenney and Keeping's (1962, cited 2007, http://mathworld.wolfram.com/StatisticalMedian.html)

claim that the median is less sensitive to outliers than any other calculation. A small proportion of respondents suggested they had either resided in a hotel (10%) or had camped (6%) for the majority of their stay.

Chart 4.10: Past & future accommodation preferentials
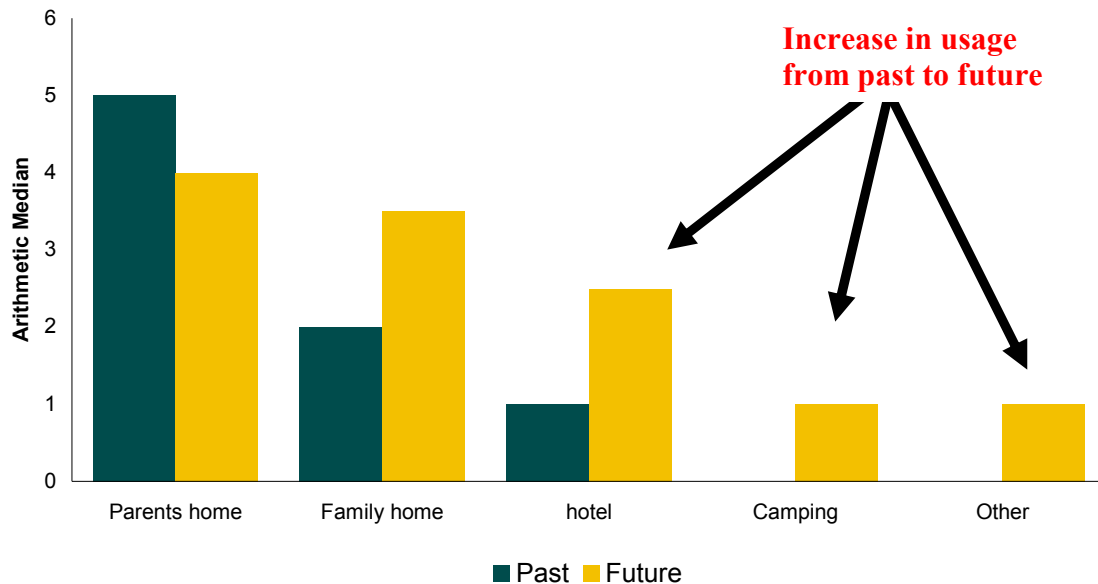
It is worth noting that by comparing 'past' with 'future' accommodation selections based on the 'arithmetic median' test, some interesting trends are noticed. In the past the significant majority of 2nd generation Moroccans resided at their parent's home for the majority of the duration of their time in Morocco. However their future decisions weighed by a reduction in the price of air travel suggest a wider dispersion of accommodation alternatives. The most significant trend illustrated in *Chart 4.10* is the increase in usage of 'hotels', 'camping' and 'other' accommodation varieties. This suggests that by reducing the cost of air-travel for 2nd generation Moroccans, they might be more inclined to travel within Morocco away from their parent's homes. What further accentuates this is that historical 'parent's home' usage sees a reduction which matches up with a similar increase in proposed usage of 'family home'. For example, if we assume that the choice of staying at a relative's house over their parent's home is due to their parent's home being too far to return to at night, this would further suggest that intra-Moroccan travel is also positively affected by a reduction in air-fares. Either way the economy benefits either directly through increased tourist receipts based on increased hotel accommodation or indirectly

through the usage of other amenities in other parts of Morocco which would not have been necessarily frequented by these second generation Moroccan diaspora.

Therefore, although this research endorses the hypothesis that 2nd generation Moroccans prefer their parent's home as main residence while abroad, the factors behind this theory can be manipulated to increase assistance in contributing to the tourism economy.

In order to further statistically substantiate this hypothesis, further in-depth analysis identifies how the respondent's choice of accommodation is affected by a reduction in the price of air travel. *Table 4.4* is a cross-tabulation of past 'parents house' usage (as the most frequent choice for previous travel) versus the choice of 'hotel usage' for proposed travel on the basis of cheaper air-travel. The table derived from SPSS emphasises the hypothesis proposed that a significant shift from past majority usage of 'parent's house' in Morocco to both 'used some of the time' and 'used majority of the time' for hotel accommodation occurs when travel is cheaper and frequency of travel increases as a consequence. What is interesting about *Table 4.4* is that it suggests that 30% of those respondents that used their parent's home as their primary residence in Morocco would change their habitual routine if their frequency of travel increases due to a reduction in air-fare.

Table 4.4: 'Past parents house' versus 'Proposed hotel' Cross tabulation

	Previous usage of Parent's residence as primary accommodation	Proposed usage of Hotel accommodation as primary residence	% change
Used either some of the time or majority of the time while in Morocco	44	13	30

4.2.5   Theme 9:   Optimum Pricing Strategy Utilising Tourism Figures

Based on previous travel over the last three years, respondents appeared mainly to be travelling once or twice a year. This emphasized Ali & Holden (2006) and Cherti (2007) that second generation diaspora are susceptible to a 'summer ritual' style of travel. A basic analysis of the price paid for a return air-ticket averages at £272. The average frequency for travel for the sample was 41 times per year. This makes it 0.82 journeys a year per respondent (on the basis of 50 in total). The total air fare cost for

the sample group was £11,152 per annum. An SPSS breakdown of how many times travelled versus how much paid for travel suggests that the higher amount paid by the respondents corresponds to the higher peak-fares of travel to Morocco during the summer holidays. This corresponds to *Chart 4.11* which evidences that most of the travel to Morocco is during the summer months.

Chart 4.11: Seasonality of trips (2005)
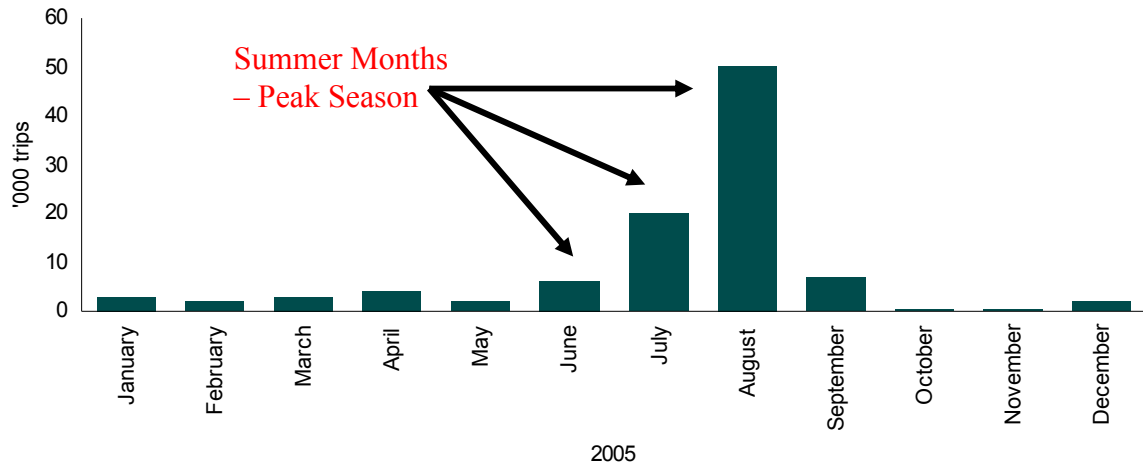
(Adapted from 'Euromonitor Country Market Insight-Morocco', 2006, p.16, original source [official statistics; www.tourisme-marocain.com, ministere de l equipment et du transport; www.mtpnet.gov.ma]

4.2.5.1 Travel Stagnation if Price Remains the Same

Previous market knowledge indicates that the prices to travel to Morocco have remained constant over the last five years. Moroccans travel to Morocco for various reasons, of which this research highlights as being described by Ali & Holden (2006) due to family influence. *Chart 4.12* suggests how many times respondents would travel in the next twelve months if the return air-fare remained the same as they had paid previously. Overwhelmingly, 75% of respondents would travel only the once. This suggests a shift in the market place where respondents were previously happy to travel at the same price before but now are no longer satisfied with the price-structure of their journeys. This is an interesting phenomenon and further research may determine a specific factor. However comparing prices and proximity to Europe, at face-value it is evident that the price paid to travel to Morocco is significantly higher than their European neighbours Spain (Calder, 2004).

__Chart 4.12: Past 3 years travel trends & proposed travel at current price levels__
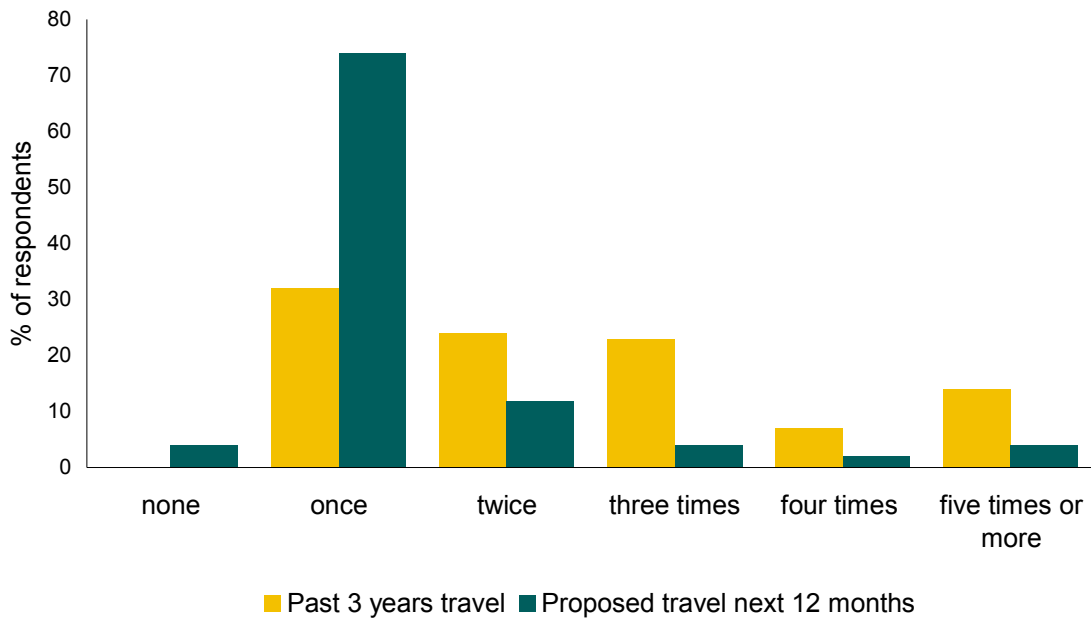
In order to fully appreciate the illustration of *Chart 4.12*, it is important to contextualise the findings with the impact of price reductions. *Chart 4.13* suggests that just over 80% respondents would travel '1-3 times' if the price was reduced to £150. An increase in travel is evidently apparent when the price of the return air-fare is reduced to £100 and then £50.

__Chart 4.13: A comparison of return air-fare prices and frequency of travel__
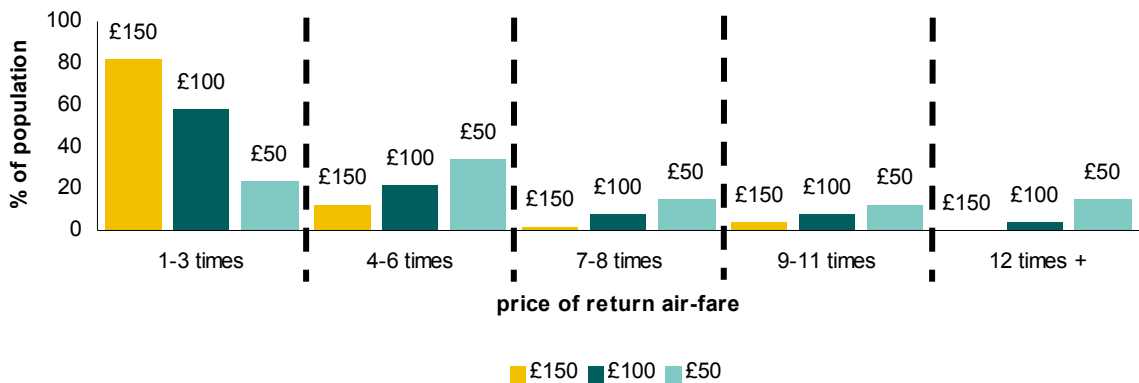
The chart highlights the relationship between price and frequency at a very basic level. The lower the air-fare the higher the frequency is. This supports the hypothesis that *an increase of frequency of air travel will occur if the return air-ticket to Morocco is reduced*. Though, this trend is thus far only visually identified.

4.2.5.2 Chi-Square Tests

In order to analyse the relationship between the prices of a return air-fare versus the frequency of travel a Pearson chi-square test was conducted. This was because it is simpler and easier to calculate than other statistical models (http://www.graphpad.com/www/book/Choose.htm, 2007) and also provides an indication of significance between elements of data (Easterby-Smith *et al*, 2002). It also provides confidence in the relationship between the two variables selected. *Table 4.5* shows the chi-square test conducted.

Table 4.5: Chi-square test – weighted by 'proposed frequency of travel' based on previous 'monies paid' for ticket

	If price reduced to £150			If price reduced to £100			If price reduced to £50		
	Observed N	Expected N	Residual	Observed N	Expected N	Residual	Observed N	Expected N	Residual
1-3 times	37	12.5	24.5	29	10	19	12	10	2
4-6 times	8	12.5	-4.5	17	10	7	16	10	6
7-8 times	4	12.5	-8.5	12	10	2	13	10	3
9-11 times	1	12.5	-11.5	6	10	-4	10	10	0
12 times +	n/a	n/a	n/a	6	10	-4	19	10	9
Total	50			50			50		

Chart 4.6 indicates the statistical inferences derived from the chi-square test conducted.

Table 4.6: Test statistics

	If priced reduced to £150	If price reduced to £100	If price reduced to £50
Chi-Square(a)	78.000	26.143	3.571
Df	3	4	4
Asymp. Sig.	.000	.000	**.467**

Low value

The low significance value suggests that the price reduction of the return air-fare really does affect frequency of travel when the price is reduced to £150 and then subsequently to £100. However the higher significance when the price reduces to £50 suggests that frequency of travel doesn't change by such a high number between a reduction of price from £100 to £50. This brings to light the question of how significant the price reduction has to be in order to produce higher frequency of travel, therefore the data was exported to Excel from SPSS and a line graph was constructed

(see *Chart 4.14*) in order to establish frequency diffusion (Easterby-Smith *et al*, 2002).

Chart 4.14: Graphical comparison of price fluctuations & impact on frequency
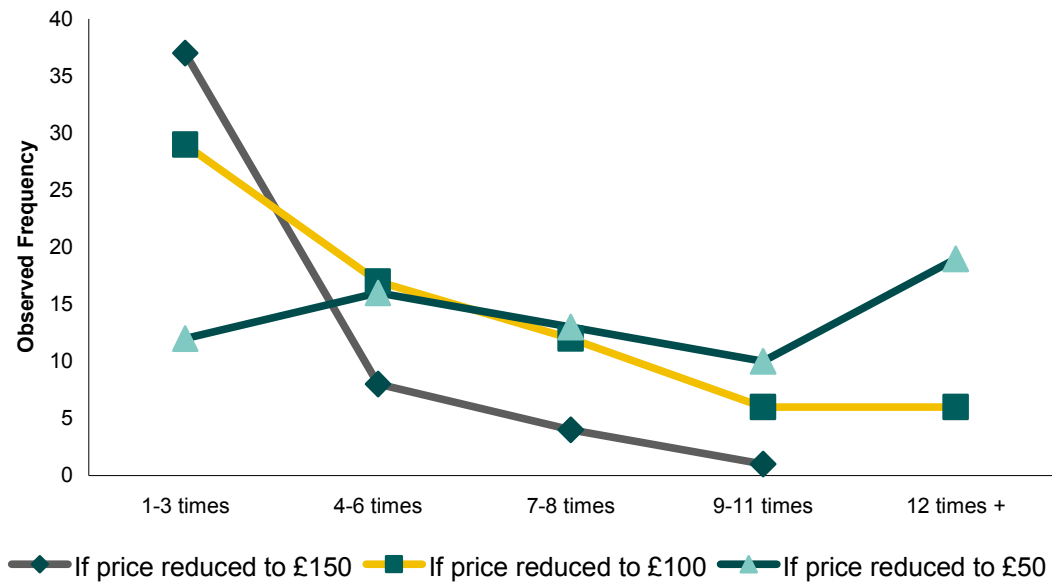
Chart 4.14 shows three lines, one for each price quartile. The '£150 price line' confirms that a decrease in price will increase frequency, however the number observed of respondents who would travel more than 'one-three' times drops significantly. The '£100 price line' also appears to follow suit though not so dramatic. However the '£50 price line' shows greater dispersion as to how many respondents would increase their travel frequency. This highlights that although price is significant. After a while, it is over-ridden by other more substantial factors such as possible work and other family commitments. It also implies that after a certain price decrease, a reduction in air-fare doesn't constitute such a significant increase in annual frequency.

4.2.5.3 Breakdown According to Price Paid for Previous Return Air-Fare to Morocco

Thus far, we have merely indicated through basic analysis the relationship between price and frequency of travel. *Chart 4.14* shows basic price dispersion of data. Further cross-tabulation of the data however, suggests that those respondents who were in the group that paid the most money for air travel were most inclined to change their travelling habits when the price was reduced.

Table 4.7: How much paid for travel previously vs. price reduction to £150 cross-tabulation

		ifpricereducedto£150				Total
		1-3 times	4-6 times	7-8 times	9-11 times	
Howmuchpaidfortravel	less than £100	0	1	0	1	2
	£100-£150	1	0	0	0	1
	£151-£225	5	0	0	0	5
	£226-£300	15	1	0	1	17
	£301-£349	12	3	1	0	16
	£350+	8	1	0	0	9
Total		41	6	1	2	**50**

Largest variation in frequency is from respondents who paid the most

Table 4.8: How much paid for travel previously vs. price reduction to £100 cross-tabulation

		ifpricereducedto£100					Total
		1-3 times	4-6 times	7-8 times	9-11 times	12 times +	
howmuchpaidfortravel	less than £100	0	0	0	1	1	2
	£100-£150	1	0	0	0	0	1
	£151-£225	4	1	0	0	0	5
	£226-£300	10	5	1	0	1	17
	£301-£349	8	2	3	3	0	16
	£350+	6	3	0	0	0	9
Total		29	11	4	4	2	**50**

Table 4.9: How much paid for travel previously vs. price reduction to £50 cross-tabulation

		ifpricereducedto£50					Total
		1-3 times	4-6 times	7-8 times	9-11 times	12 times +	
howmuchpaidfortravel	less than £100	0	0	0	1	1	2
	£100-£150	1	0	0	0	0	1
	£151-£225	1	0	2	0	2	5
	£226-£300	1	3	3	5	5	17
	£301-£349	2	3	3	2	6	16
	£350+	2	2	3	1	1	9
Total		7	8	11	9	15	**50**

The above dispersion of the travellers as the price reduces episodically suggests travel patterns being similar to current levels/trends; however as the price of return air-fares reduce, more respondents react by stating their travel frequency would increase. The graph below further dissects this data in order to further understand these 'trends'.

Chart 4.15 indicates that as price decreases frequency of travel becomes more dispersed for those that previously paid £226-£300 for a return air-ticket.

Chart 4.15: Analysis of those who paid £226-£300 previously
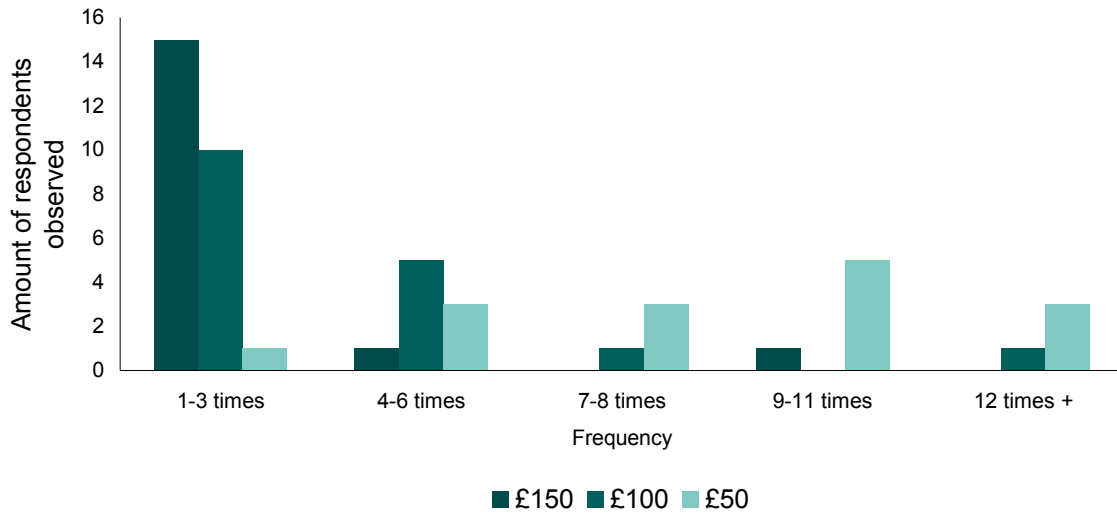
Chart 4.16 also suggests that as the price decreases, frequency of travel increases for those who paid £300-£349. However the dramatic shift noticed for '12 times+' indicates the influence price reduction has on those that paid £301-£349. This chart, at face-value, appears to bear similar resemblance to *Chart 4.15*, however it is key to note that the price bracket of £301-£349 is the price currently paid by Moroccans travellers during the peak summer season. Earlier in this discussion it was evidenced that most second generation Moroccans travel during this season, therefore the shift noted towards '12 times +' becomes more significant in understanding how contribution a reduction in price for the return air-fares would impact upon the economy in Morocco.

Chart 4.16: Analysis of those who paid £301-£349 previously

Analysis of those who paid £301-£349 previously
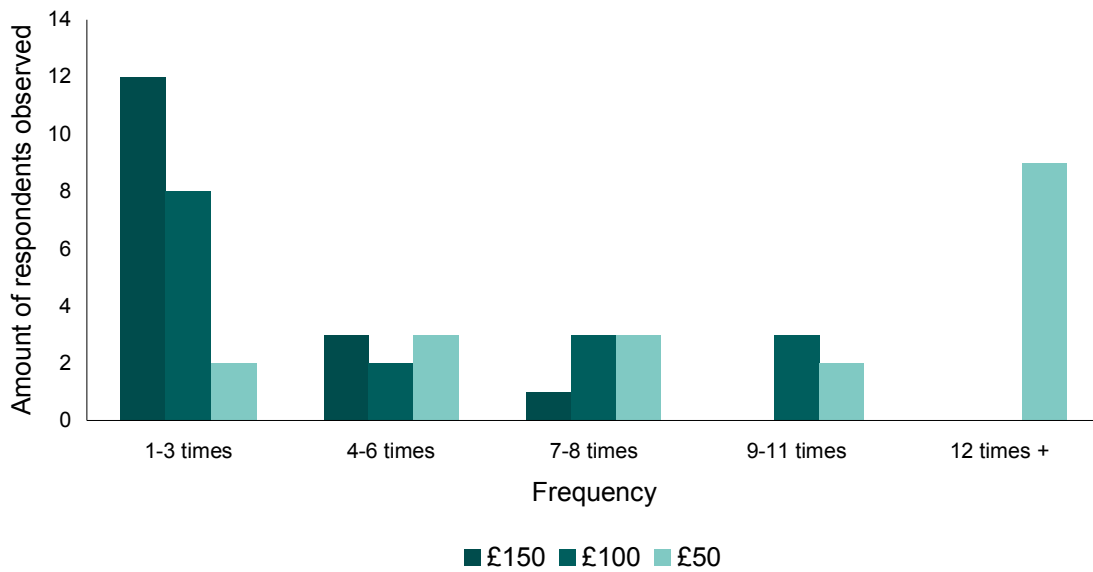
However *Chart 4.17* suggests that those who paid the most for their return air-fares (£350 or over) did not change their frequency as dramatically as those identified in *Chart 4.16*. This untypical result questions the factors for paying such a high price for travelling to Morocco. *Chart 4.17* doesn't follow the same trends as *Charts 4.15* and *4.16*, therefore this enquires as to whether it is on the basis of other undisclosed factors that the ticket assumed such as a high price.

__Chart 4.17: Analysis of those who paid £350+ previously__

Analysis of those who paid £350+ previously
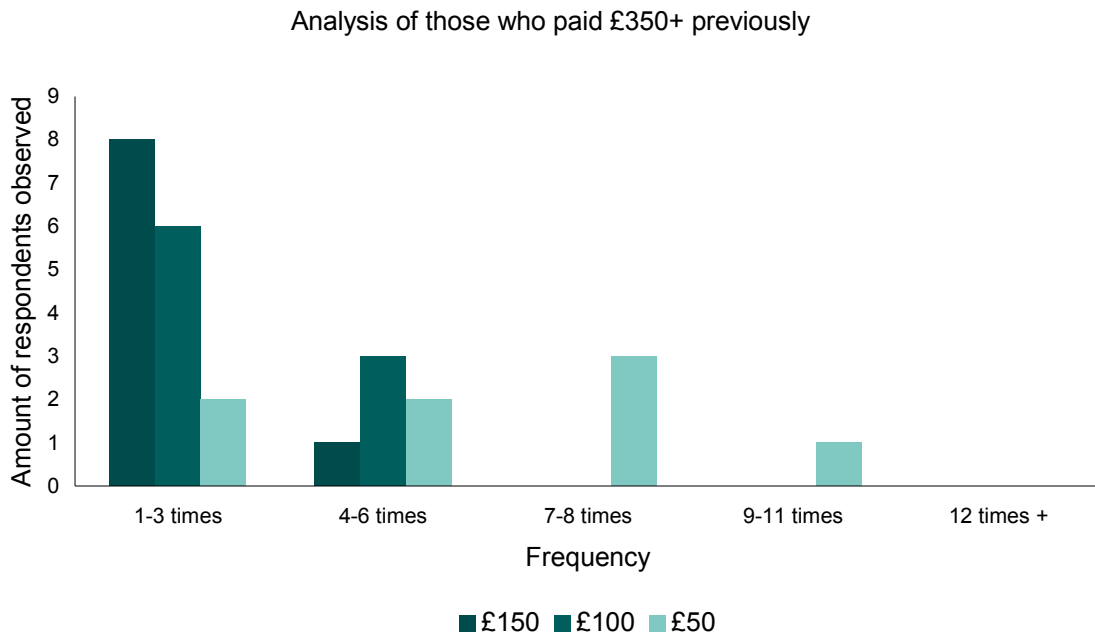
4.2.5.4 Breakdown According to Socio-Economic Status

Break-down of data based on socio-economic status observed via a cross tabulation of reduction in price alongside socio-economic status suggests that those respondents working part-time and students had a linear frequency to the price paid per ticket. Their 'arithmetic mean' frequency was specifically increased by the same figure decreased when the return air-fare was reduced. This suggests that the travelling habits of students and those working part-time were price-elastic. This corresponds to the view that students and people working part-time are more flexible in making travel decisions and maybe inclined to travel mid-week when the tickets are cheaper (ELFAA, 2004). Interestingly, those working full-time did not change their travel behaviour significantly until the price was considerably reduced to £50. This suggests that their price elasticity is dependent on other factors, possibly work priorities and commitments.

Table 4.10: Socio-economic impact as a result of price change

| | Socio-Economics | | | | |
| | working full time | working part time | unemployed & seeking work | student | other |
	Mean	Mean	Mean	Mean	Mean
If price reduced to £150	2	2	1	1	.
If price reduced to £100	2	3	1	2	.
If price reduced to £50	3	4	2	3	.

Table 4.10 suggests that the same amount of duration is proposed by the respondents unilaterally across the sample regardless of socio-economic status. The indication of almost no change regarding the duration of the visit to Morocco suggests that duration is not susceptible to a reduction in air-fares based on this research. However, it is illogical to assume that a person who currently travels once a year to Morocco stays month would stay for twelve months if the price was reduced to £50. Therefore the results can be misleading if not contextualised appropriately and sense-checked.

Table 4.11: Socio-economic impact as a result of duration of stay

| | Socio-Economics | | | | |
| | working full time | working part time | unemployed & seeking work | student | other |
	Mean	Mean	Mean	Mean	Mean
How long did you stay	4	4	4	4	.
How long proposed stay	4	4	5	4	.

4.2.5.5 Regression Analysis

Having established that there is a relationship between the price of the 'return air-fare' and 'frequency of travel'. A regression analysis was conducted in order to attempt to quantify how much the 'price of a return air-fare' really has on 'frequency of travel'. Regression was selected because it enables the building of a mathematical model that enables accurate predictions to be concluded (http://www.sixsigmafirst.com/regression.html) through the identification of dependence on the average statistic (Huang, 1970).

Table 4.12 suggests that the regression model only accounts for a portion of the relationship between frequency of travel and a change in the price of the air-fare. It statistically quantifies the strength of the relationship as being only 30%.

Table 4.12   *Regression table: model summary*

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.545(a)	.297	.265	1.252

A Predictors: (Constant), ifpricereducedto£50, ifpricedreducedto£150, ifpricereducedto£100

This is interesting because it suggests that the relationship between air-fares and frequency is not as strong as previously thought thus questioning the behavioural determinants of increased travel to Morocco may not be as strongly influenced as thought. What this does bring to light is other factors which may explain the 70% which the regression model fails to account for.

4.2.6 Theme 10: Money Spending Rituals while in Morocco

Nonetheless, frequency of travel is influenced by the price of the return air-fare. Even if the relationship can only be quantified as 30% understanding how behavioural spending changes as a consequence is important. An identification of a relationship would cement that through deregulating the airline industry other sectors of the economy would benefit through increased visitor frequency. The assumption is made that due to the money saved by purchasing cheaper air-tickets, visitors would have more money to spend while on vacation. Thus the economy benefits directly rather than through only the third party airlines. *Chart 4.18* illustrates how much money is spent currently by respondents while in Morocco.

The graph illustrates a variety of sums of money being injected into the economy. This general graph indicates that most respondents spend £150-£199 per week while on holiday in Morocco. Further breakdown of the figures in the graph suggest that on average approximately £673 is spent per respondent per week while in Morocco on the basis travel frequency remains at similar levels based on the findings of the research so far that travel frequency would increase as a result of lower air-fares, a calculation was drawn up suggesting that the weekly budgeted amount to be spent while in Morocco almost halves to £384 as frequency increases. This trend was not unforeseen as it is conventional to assume that the more times a person travels abroad, the less money they have to spend as long as their annual income remains at current levels.

Chart 4.18: Weekly amount spent while in Morocco
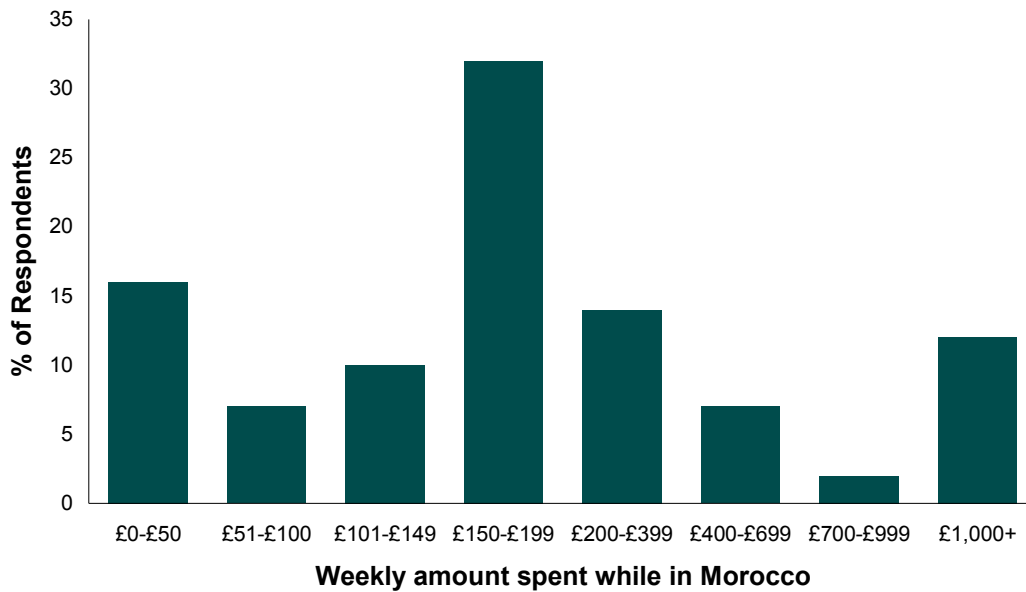
Following on from this basic calculation it can be judged that in order to sustain the current economic transactions based on tourism receipts, the respondent would be expected to travel twice annually in order to equal the current amount contributed to the economy by one tourist if the return air-fare price was reduced to £150.

Therefore taking the above into account, for the deregulation of the airline industry to have a positive impact on the economy, travellers need to be convinced to travel more than twice annually based on current financial spend per week. The table below explains a combination of previous and forecast calculations in order to understand the financial benchmarks which need to be achieved in order for a reduction in price of air travel to impact beneficially on the economy. The model also enables an understanding of the optimum pricing strategy to be chosen.

Table 4.13: How price of a return air-fare affects tourist receipts from 2nd generation Moroccans living in the United Kingdom

		previous	proposed		
	AVERAGE PRICE OF RETURN TICKET	£272.40	£150	£100	£50
	Estimated Frequency of travel (per 50 respondents)	50	140*	207*	323*
Figures for total population	total ticket receipts	£13,620◆	£21,000#◆	£20,700#◆	£32,300#◆
	Estimated frequency * proposed money spent per week	£33,656♣	£53,836♣	£79,600♣	£124,207♣

spend per person per week	£673.11	£384.54	£384.54	£384.54
spend per person per year	£673.11	£1,076.72	£1,592.00	£2,484.14

NOTE 1: * Researcher estimate - # Researcher calculation

NOTE 2: ◆ calculation of 'average price of return ticket' multiplied by 'estimated frequency of travel (per 50 respondents), ♣ calculation of 'estimated frequency' multiplied by 'spend per person per week'

The table suggests that the reduction in air-fares is compensated by the increase in spend per frequency of travel to Morocco. The figures are estimated. They may lack mathematical reliability; however the impact of lower air-fares to Morocco becomes clearer. Although the weekly spend reduces per travel on average (from £673 to £385), by increasing frequency, more money is circulated within the economy on a longer period basis. This suggests a long sustainability of income from tourism receipts if maintained appropriately.

Having created a financial benchmark as indicated in *Table 4.13*, further analysis of the data transposed into supply and demand allows an understanding of the relationship between the variables of price of air-ticket and frequency and judges the adequate price level to be charged per air-fare in order to benefit the economy in the most advantageous way.

The chart below (*Chart 4.98*) suggests £148 as being the most appropriate price that will create the most revenue for the airlines. It is important to highlight this price because the airlines are independent from the government of Morocco, thus their aims would be different. The deregulation article doesn't allow a price-cap to be enforced, thus the competitive nature of the airlines needs to be considered on the assumption their priority is to appease shareholders rather than the economy of the host country.

Chart 4.19: supply and demand of price of return air-fare versus frequency of travel
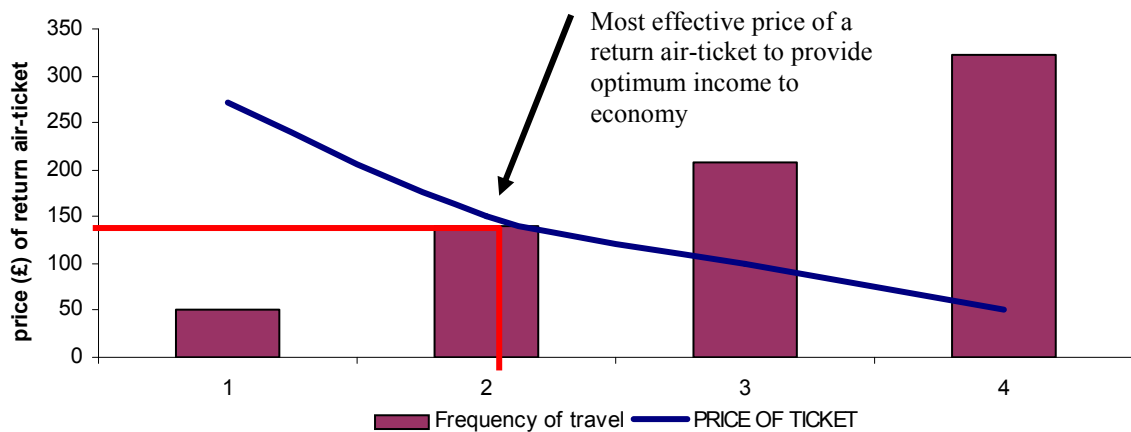
Having demonstrated the most effective price for the airlines *Chart 4.19* exemplifies the suggested price of the air-ticket as an agent of increased tourism spend.

Chart 4.01 suggests that the most effective economic injection as a consequence of decreased prices of air-fares would be achieved if a price of £140 is charged for a return air-fare; contributing to approximately £70,000 estimated financial gain for the economy.

Chart 4.20: Amount of money impacted within the economy
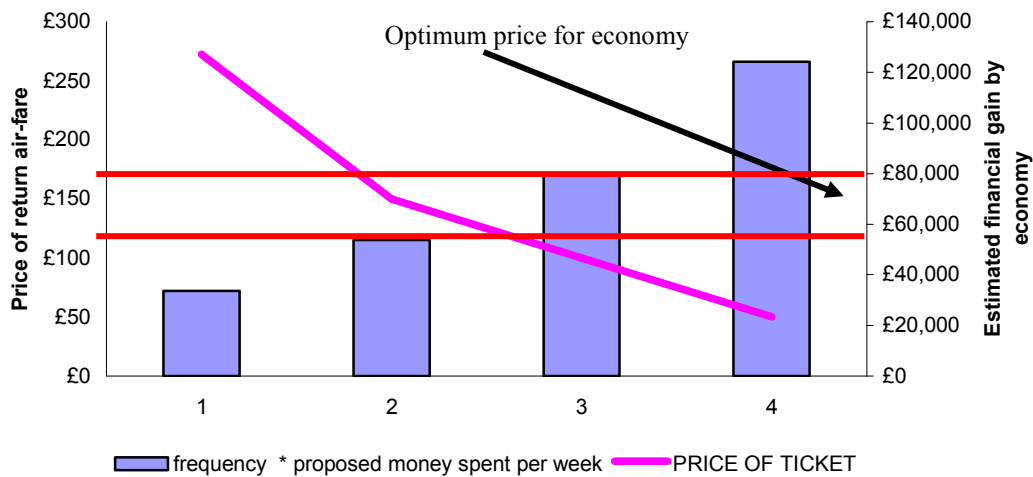
What is worthy of note is the almost similar price level that the model suggests should be charged in order to increase revenue for the airlines and contribute to the economy. Both *Chart 4.19* & *Chart 4.20* suggest the importance of the price of the air-fare. The slight variance between the amounts charged which is most effective for the airlines and the amount charged which is the most effective for the economy shows the altercation between industry and economic prosperity. This further illustrates that if the deregulation does indeed increase frequency and thus economic financial injection both parties benefit. Thus hypothesis four is true that t*here is an apparent relationship between the price of a return air-fare to Morocco, frequency of travel and then money spent in Morocco.*

4.2.6.1 Sustainable Tourism at a Micro-Economic Level

Table 4.13 is based on a number of assumptions as discussed previously. However one aspect not yet elaborated upon is the type of expenditure the economy benefits from by reducing the price of return air-fares. So far all analysis has only suggested that there is an increase in money spent on the economy. However, it is important to highlight that economically sustainable tourism is vital in achieving a longer-term strategy for visitor numbers. As highlighted in the literature review, some critics suggest that money spent in the economy by tourists never remains within the host country but is drawn outside to the multinational corporations based in the more economically advanced countries of the European Union and Northern America (Lea,

1998). This research however suggests that second generation Moroccan spending is mainly concentrated on local development.

The type of expenditure of 2nd generation Moroccans living in the UK appears to remain in the local economy based on the chart below. The two main elements of their expenditure which are clear are 'food & drink' and 'shopping & entertainment'. These two are services are driven by local businesses which contributes directly to the local economy. The third category, 'transport' is also vital for the local economy because it encompasses public transport systems as well as the renting of cars for leisure purposes. The former appears to be more appealing for the development of the transport infrastructure; however the latter may be the easier option for the tourist. Anyhow, both contribute to employment and tourism receipts at a local context. The above chart directly accounts for hypothesis 6; *Most of the money spent in Morocco by 2nd generation Moroccans goes back into the local economy*.

Chart 4.21: expenditure trends; 2nd generation Moroccans while in Morocco

Accommodation, as indicated through the questionnaire earlier does not have such a high level of spending towards on the basis that 2nd generation diaspora living in the UK have family homes in Morocco where they reside, therefore the hypothesis of Lickorish (1994) that money leaves the economy and is not retained has little relevance to the current tourism rituals of the 2nd generation diaspora investigated in this study. However, this research has highlighted that an increase in more tourist engineered accommodation would occur if an increase in frequency is produced as a

result of cheaper air-tickets, therefore there should be a strategy for local based business development in order to keep the economy locally sustained.

4.2.6.2 The Image of Morocco

Respondents were asked as a result of the deregulation of the airline industry in Morocco how they reacted to four factors. These being:

1. Access to Morocco
2. Contact with relatives in Morocco
3. Holiday choices in Morocco &
4. Recommend Morocco to friends

As identified by *Chart 4.22*, all four factors were 'strongly agreed' with by the participants. An insignificant number of respondents strongly disagreed with the statements proposed.

Chart 4.22: Opinion based on lower fares
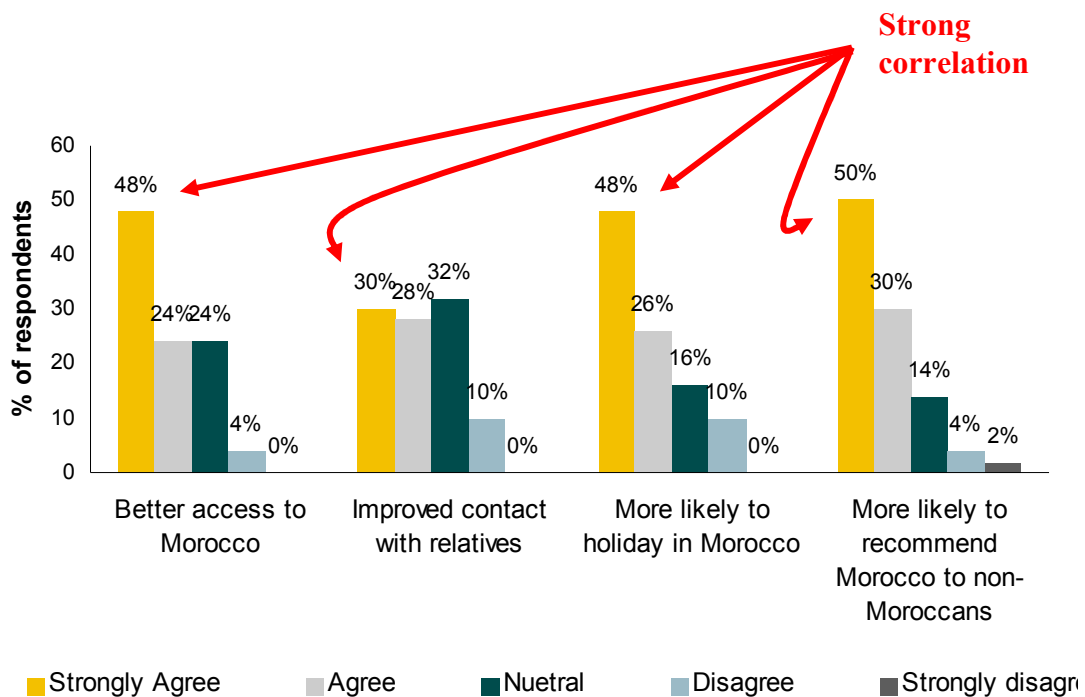
This level of affection now felt towards Morocco by the 2nd generation diaspora living in the UK based on a reduction in air-fares provides the basis that correlations with remittance and an increase in tourist receipts could be fostered if the right policies are incorporated into the tourism vision. However, the most interesting aspect of this data analysis is the disparity of 'improved contact with relatives'. It is interesting that 32%

of respondents thought that by increasing their frequency to Morocco their contact with relatives would be improved. This also suggests the move to tourism tendencies for second generation diaspora. Thus where as before they would be inclined to go for family, it may no longer be the primary reason for travel after the one journey per year. By accounting for second generation Moroccan diaspora living in the UK, tourism policy could find it has contributed to the Moroccan economy far greater and in a more sustainable way than could have been imagined just by manipulating travel frequencies for those current travellers.

4.3   Summary of Chapter

This chapter has displayed the main findings from the research and has identified trends which provide economic synergies for Morocco. It has also discussed elements of the research based on a thematic approach which the next chapter, 'chapter 5: Conclusion', would discuss in broader terms.

CHAPTER 5: CONCLUSION

5.1   Key points from the research

This chapter will bring the individual results of the research together and conclude in terms of how air liberalisation in Morocco impacts upon its tourism strategy through the factor of pricing. Thereafter this chapter will also mention further research possibilities which could be considered.

To summarize the results succinctly (bold includes most important findings);

- **British based tourism is escalating at a faster pace than other European countries (37% y-o-y increase 2005-06). Morocco is actively trying to channel this into increased tourism receipts**

- **Since deregulation, the main route experiencing this impact is the London-Marrakech route. Fares are down [by between 23% to 41%] depending of airport of departure in London. Frequency of departures increased by 250%**

- Selected mass tourism is being developed with concentration on family based tourism services which build links with the local community

- Family is the primary motivation behind ritual travel once annually for second generation Moroccan diaspora in the UK. However as travel frequency increases, tourism inclinations begin to exhibit amongst second generation Moroccan diaspora in the UK

- **Price of the return air-ticket is the most significant factor, but accounts for only 30% of travel decision choices of second generation Moroccan diaspora**

- Although most respondents would increase their frequency of travel, 65% would still prefer to depart from London Heathrow Airport

- **Accommodation choices transform as frequency increases. 30% who would previously have resided at their parents house, would begin using hotels should their frequency increase**

- Greatest change by respondents who paid '£226+' per ticket in the last three years. More dispersion of frequency as price decreases sequentially

- Socio-economic status does not have a great implication either on residential or travel preferences

- **£140-£150 is the ideal price for greatest contribution to the economy from both airline's perspective and local economic benefit**

- As frequency increases amongst second generation diaspora, money spent at destination decreases per week (from £673 to £384). If prices are reduced to £150 then maintained frequency should be at minimum twice a year to maintain current level of spend into economy

- **Second generation diaspora spending patterns suggest they contribute to local business development which directly impacts upon the micro-economy of the region**

- Second generation diaspora are more likely to holiday, recommend and increase their access ability to Morocco as a direct consequence of deregulation as price reductions ensue and frequency increases.

5.2   Modelling 2nd generation Moroccan Tourism Demands

Tourism demand is quite price elastic, and aviation liberalisation has brought down fares, thus increasing tourism overall, and often, altering patterns of tourism.

(Forsyth, 2006)

The first model below is the linear hypothesised model as suggested by previous literature. If all factors are equal it suggests that a reduction in the price of the return air-fare to Morocco would determine an increase in frequency of travel which would then contribute to a greater income from tourism receipts for the economy.

Illustration 5.1: Linear Model of price-effect on tourism
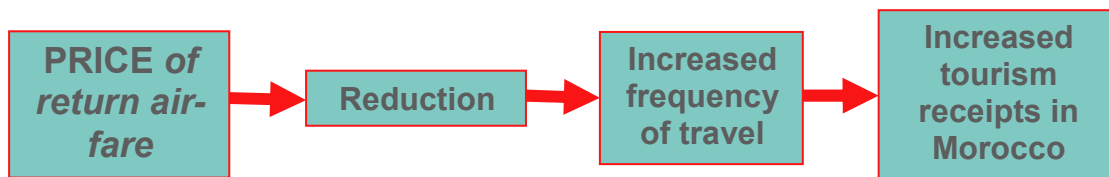
However, this research has highlighted that there are other extenuating factors which contribute to the decision process to travel to Morocco for second generation diaspora in the UK. The following model endeavours to bridge the relationship between past travel trends and how it influences future travel trends in conjunction with the relationship of money spent while in Morocco.

Illustration 5.2: Generated Model of factors affecting price of return air ticket
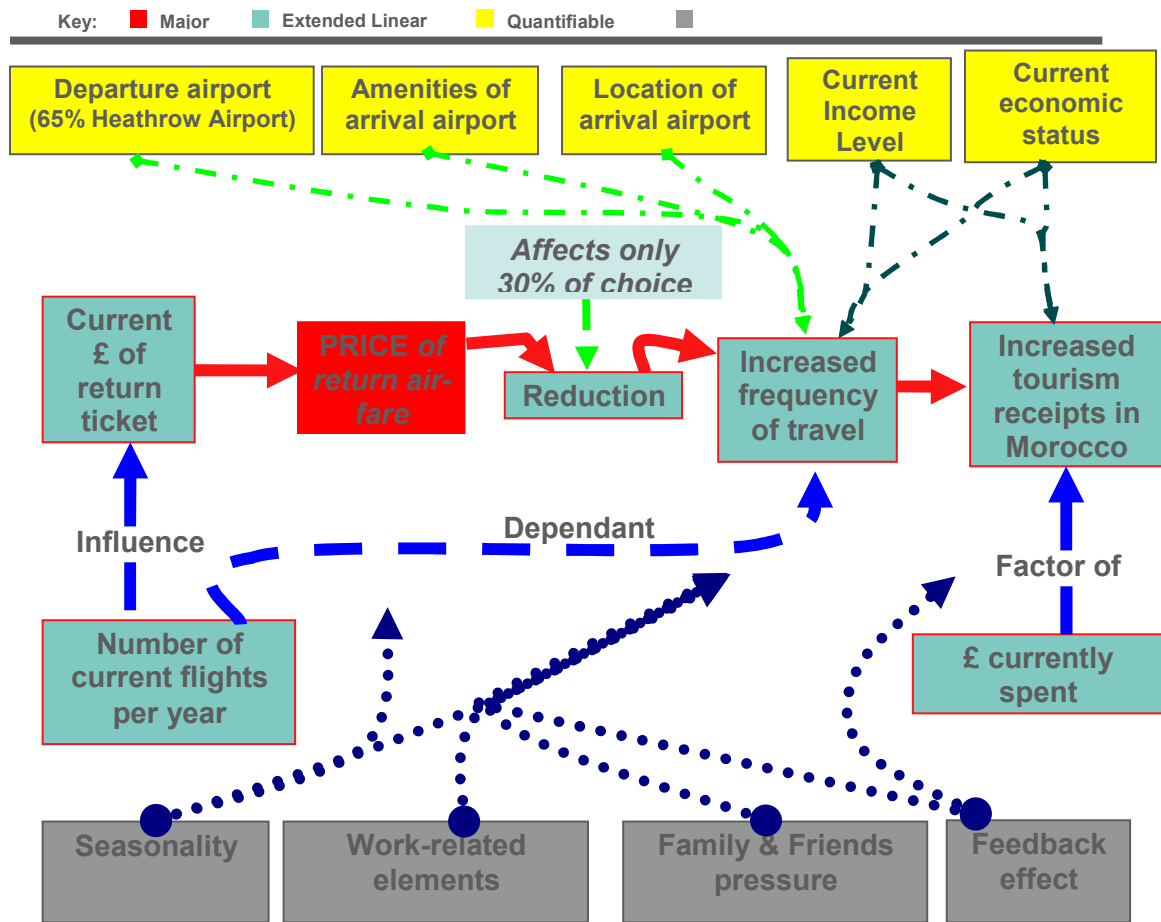
The previous price paid for a return air-ticket heavily influenced the current frequency of travel. The model identifies that it is not simply a question of deregulating the skies over Morocco only and expecting the travellers to choose Morocco. It suggests that although pricing is a key product of deregulation and a key element of increasing frequency of travel, the motives of travelling to Morocco by second generation diaspora need to be considered alongside the current trends. However, more importantly, tourists, whether Moroccan or non-Moroccan cannot be expected to alter their travel habits over night and the process may take some time to become habitual after the introduction of low fares, therefore increasing sustainability.

The issues of this research are multifaceted. The participants who paid £301-£349 previously for one annual trip show the greatest elasticity, and those who previously paid £100-£150 show the least elasticity to price. A further complication to this model

is the connection between increase in frequency and the direct effect on the amount of money spent while in Morocco. This it self, is compounded by the amount of money currently spent amongst other factors.

Ali & Holden (2006) suggest the 'myth of return' of first generation diaspora in the UK strongly influences the travel trends of the second generation, thus this questions the elasticity of 'tourism related trends' for the whole Moroccan diaspora living in the UK and even suggests an underlying 'stronger' force not able to be quantified mathematically or to be encapsulated by the model.

5.3   Feasibility of Proposed Price Strategy

The results from the research suggest an optimum market price of £140-£150 per return air-fare to Morocco from the UK. Schipper *et al* (2007) suggests that airlines choose their frequency and price in order to reduce 'price competition' where there is in-elastic demand. What this research suggests is that through the introduction of LCC's the current identified average price of £272 per return air-fare can be reduced as a direct result of competition through deregulation. LCC's bring a reduction in price of 30%-50% (Doganis, 2001, *cited* Alamdari & Fagan, 2005) which provides theoretical support to the optimum pricing strategy advised during this dissertation (which is a reduction of 43% of the current average return air-fare of £272).

Price is a key differential in estimating the travel frequency of second generation diaspora in the UK (Mason, 2000) Although the current market situation is perceived as price-inelastic, this can be manipulated to the advantage of both carriers and host country in transforming the market into having in-elastic characteristics (ELFAA, 2004). The research quantifies that considering the whole population, if the ticket was reduced to £150, travel would increase to three times a year. If reduced to £100, travel would only increase by one to four times a year. And finally if reduced to £50, travel would be six times annually. Thus although the optimum pricing strategy would be £140-£150 per return air-ticket, in order to increase the economic benefit to the host country the return air-tickets should potentially be sold below this price. The competition of the deregulated market would potentially be a catalyst for creating such competition impacting upon this (Beiger & Wittmer, 2006, Pels & Reitveld, 2004) thereby increasing passenger numbers.

The airline industry does not adjust price of air-fares purely as increasing frequency. Airlines have a structure which dictates the price of individual seats on aircraft. However, by suggesting the price of £140-£150 per 'seat', this suggests that prices can be charged either side of this 'bracket' in order to ensure the aircraft maintains adequate economic capacity (Alamdari & Fagan, 2005).

In terms of government policy, two key issues which may need to addressed is the marketing of Morocco as a tourist destination for Moroccans as well as non-Moroccans in Europe and also further policy revisions which may dictate some suitable sustainability commitment from the airlines (McHardy & Trotter, 2006), specifically the LCC's who enjoy low-barriers to entry to a number of countries keen to increase tourism figures (ELFAA, 2004).

5.4   10 Million Tourists – A Sustainable Vision

Having compared flights to Marrakech and Fez from the London region and identified the decrease in price for flights post-deregulation, it is possible to breakdown how many flights are needed in order to achieve the vision of twenty million tourists.

Currently there are 6.5 million visitors to Morocco who are classified as tourists (based on Moroccan tourism ministry figures, 2007, accessed 23/03/07, http://www.tourisme.gov.ma/english/5-Tourisme-chiffres/1-Chiffres-cles/index.htm).

If a simple calculation is performed, a clearer understanding of the tourists needed to achieve the tourism vision;

10mln tourists [target] – 6.5mln tourists [current] = 3.5mln tourists

3.5 mln tourists are needed in order to achieve the '2010 vision'. By dividing this figure by 52 weeks (52 weeks in a year), we arrive at 70,000. This is the amount of tourists required in addition to the current level per week in order to reach the number of 10mln tourists. In taking this calculation further, the reader should assume the following (ELFAA, 2004:

- All airlines that fly to Morocco from Europe operate a single type aircraft, possibly a Boeing 737 or an Airbus A320 (both seat similar number passengers)

73

- Passenger configuration of 150 passengers per flight
- Passenger load factor is on average 70% (meaning that 105 passengers are on-board every flight)
- Of the 70% of passengers on-board 80% of these are classed as tourists (therefore 84 passengers of every flight are tourists)

Therefore all other factors being equal, the kingdom of Morocco needs to receive a further 833 flights per week in order to arrive at its target of 10mln tourists.

Although this appears a large figure, analysis conducted on the airports in Morocco suggests that if the top ten airports were utilised to their capacity, only an extra 11 flights per day would be needed per airport to accommodate such increases in passenger numbers.

5.5 Diasporic Tourism as a Fruitful Element of Tourism Development

The findings of this dissertation suggest that second generation diaspora in the UK would increase their frequency to Morocco as a consequence of lower air-fares. This is key in bringing together synergetic elements of current GDP development.

As a consequence of the 'myth of return' theory (Ali & Holden, 2006) the diaspora are inclined to travel to Morocco. The research suggests their contribution to the economy is one which is not easily measured by usual tourist measures. Their spending habits become interlinked with the local community which they inhibit (Brouwer, 2006) and as a positive consequence to this, the local regional economy benefits greatly (Lafferty & van Fossen, 2001). Alongside this, the impact of remittance which currently contributes the same volume to GDP as tourism receipts would potentially increase. Thus the economy not only benefits from a touristic perspective, but also a more sympathetic Moroccan diaspora living in the UK.

5.6 Implications for Economic Development

Previous research conducted by Beiger & Wittmer (2006) and Croes & Vanegas Sr (2005) have revealed that tourism can be used as an economic vehicle (Binns & Nel, 2002, Goymen, 2000 & Mansfeld, 1992 as further examples). By liberalising the air transport market Morocco has provided the travel medium for tourists in order to aid this economic vehicle. This has also impacted upon migrant Moroccans in the EU

including the UK, therefore also influencing the travelling habits of 18-30 second generation Moroccans (Ali & Holden, 2006).

Potentially an extension of the current tourism policy should be adapted in order to exploit the relationship between tourism and remittance receipts as well as the other benefits diaspora bring when returning to their 'home' (Ali & Holden, 2006).

5.7 Implications for Responsible Tourism

In understanding the concepts of sustainable tourism development, Morocco has utilised the WTO Global Code of Ethics for Tourism (GCET) (2001) in order to develop the Moroccan Responsible Tourism Charter (MRT, 2007) which attempts to incorporate the interests of local communities as well as that of other traditional stakeholders. The figure below attempts to establish the relationship between the elements involved:

Illustration 5.3: How Responsible (Sustainable) Tourism Policy is implemented

Moroccan Tourism Ministry	External Bodies Policy
Concept of Responsible Tourism	Planning, Delivery, Awareness, Experience
Moroccan Charter for Responsible Tourism	Other partners (UNESCO, WTO)
Guide for Tourists	Charter-mark for Responsible Tourism

Major Dimensions: Culture, People, Environment, Economy
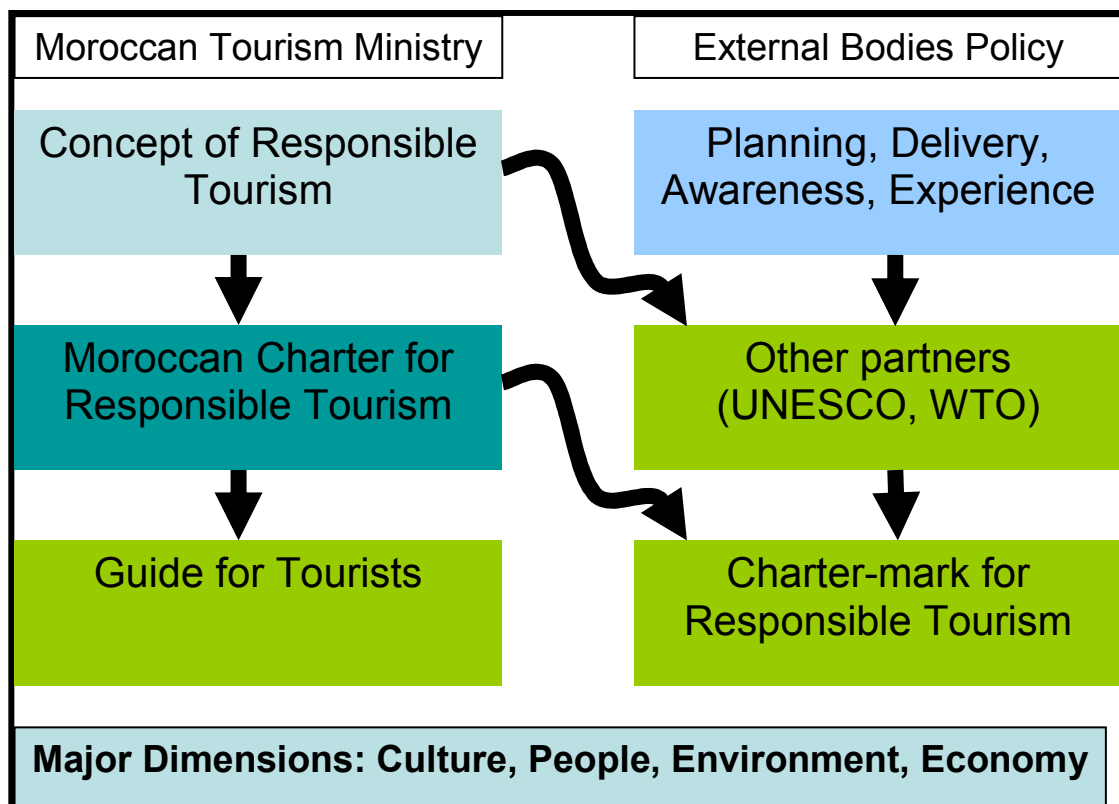
The aim of this strategy and Charter-mark is to incorporate all stakeholders involved in Tourism development and encourage them to be more aware of their environmental considerations which would have never been incorporated before into their business strategy (Ayala, 1995).

5.8 Value of Research & Contribution to Academic Knowledge

This study used a mixed methods approach to ascertain the views of second generation Moroccan diaspora living in the United Kingdom as well as incorporate their travelling habits within the contextualisation of tourism as an economic vehicle. The study began with a specific survey in order to generalise results to the specific population in question to identify trends and attributes of this group of travellers. Quantitative data analysis formed the basis upon which face-to-face interviews were structured. This was so that the unique population traits of the population targeted could be attributed within a wider context. Based on Pansiri's (2005) research framework, this study incorporates triangulation as the most effective method of gathering research in tourism.

The justification for this strategy was to compensate for the flaws of the different methods utilised by the strengths of compensating measures. This helped in achieving the best of each research methodology (Denzin, 1970) and allowed an insight into both macro and micro economic discussions to be based. Mixing methods in this study allowed an understanding of the factors affecting the 2nd generation '18-30 year old' population and the interviews with the Moroccan tourist ministry and the Economic department allowed a wider contextualisation of the factors which could affect this market segment.

5.9 Further Studies

Previous studies have indicated the breadth of research available and conducted over the last ten years from a variety of perspectives including understanding the 'myth of return' theory (Ali & Holden, 2006), Transnationalism development (Brouwer, 2006), Economic theory (Brophy & St.George, 2003), competition (McHardy & Trotter, 2006), passenger welfare (Schipper *et al*, 2007) and pricing behaviour (Pels & Rietveld, 2004) both pre- & post- aviation deregulation. The foundation of this dissertation was to bring together airline pricing strategy and tourism pricing strategy in order to understand 'why?' specific pricing structures should be recommended in order to aid economic development, not only from the airline perspective but also the regional tourism economy. This study also tried to understand 'how?' this impact is

affecting a specific market segment which is already a major contributor to the tourism industry.

In the context of specialised tourism pricing strategy, this research furthers the understanding of the factors affecting the second generation population of Moroccan diaspora living in the United Kingdom and contributes to understanding of the withdrawal of barriers which can contribute to an increase in diasporic tourism of this market segment. This research also advances knowledge in understanding the micro- and macro- economic underlying factors and their contribution and affect to tourism as it is used as an economic vehicle in the Moroccan context.

However as indicated within the methodology chapter only a sample of fifty participants were selected. They were also specifically within the age group of 18-30 years of age. In order to increase the validity of the findings it would be key to increase this number to at least 200 participants of a variety of ages in order to develop an in-depth model of understanding the economic impact of diasporic tourism. This alongside a parallel study of non-diasporic based tourism (i.e. English tourists to Morocco) of the same sample size would provide a basis for cross-sectional analysis and understanding of trends between the two groups, not only regarding the pricing strategy of the airlines but also the spending patterns of tourists while in Morocco.

Further to this study, a cross-section could also be conducted comparing two similar countries, for example, Egypt alongside Morocco (similar in both size, GDP and other economic elements) in order to identify how elastic the air-ticket fare is between the countries and the consequential impact of tourism development within the host country.

END *(15,000 words approx. [excluding tables, graphs & titles])*

Appendix 1: REFERENCES

Anon., (2007) 'Morocco fact-file'. [www]
http://www.cia.gov/cia/publications/factbook/geos/mo.html. [Accessed 24th March 2007]

Anon., (2007) 'Morocco GDP data query'. [www] http://devdata.worldbank.org/data query. [Accessed 23rd March 2007]

Bieger, T & Wittmer, A (2006) *Air transport and tourism – Perspectives and challenges for destinations, airlines and governments*, Journal of Air Transport Management, vol. 12, pp.40-46.

Calder, S. (2004) The Truth behind the Low-Cost Revolution in the Skies,1st Ed, Virgin books, London

Creaton, S. (2005) Ryanair: How a Small Irish Airline Conquered Europe, Aurum Press Ltd, London

Dieke, P (2003) *Tourism in Africa's economic development: policy implications. Management Decision*, vol.41, no.3, pp.287-295.

Erbes, R. (1973) *International Tourism and the Economy of Developing Countries,* OECD, Paris

Falzon, M (2003) *Bombay, our cultural heart: rethinking the relation between homeland and Diaspora*, Ethnic & Racial Studies, vol. 26, no. 4, pp.662-683, *cited* **Ali, N** & **Holden, A**, (2006) *Post-colonial Pakistani Mobilities: the Embodiment of the 'Myth of Return' in Tourism*, Mobilities, vol. 1, no. 2, pp.217-242

Framework Agreement (2001) 'Framework Agreement'. [www] http://www.tourisme.gov.ma/docspdf/accordcadre_en.pdf. [Accessed 1st November 2006]

Intuitive Biostatistics: Choosing a statistical test, http://www.graphpad.com/www/book/Choose.htm [Accessed 2007]

Jensen, T (1998) *Income and price elasticity's by nationality by tourists in Denmark*, Tourism Economics, vol. 4, no.2, pp.101-130, *cited* **Madsen, B** (2003) *Regional economic impacts of traffic regulation on tourism: the case of Denmark*, RURDS, vol.15, no.2, pp.148-169

Lickorish, L. (1994) *Developing Tourism Destinations: Policies & Perspectives*, Antony Rowe, London

McHardy, J & **Trotter, S**. (2006) *Competition and deregulation: Do air passengers get the benefits? Transportation Research Part A,* vol. 40 pp.74-93.

Moroccan Tourism Ministry, (2007) '**Facts & Figures**'. [www] http://www.tourisme.gov.ma/english/5-tourisme-chiffres/1-chiffres cles/index.htm. [Accessed 23rd March 2007]

Office of National Statistics, cencus.customerservices@ons.gsi.gov.uk, 2007. RE: 0103/01/02/ST/PW request of table EF03. [online]. Message to J Touzni (cb03jjt@brunel.ac.uk). Sent Friday 9 March 2007, 11:20. Available from : https://owa1.brunel.ac.uk/exchange/ [cited on 9 March 2007]

Pansiri, J. (2005) *Pragmatism: a methodological approach to researching strategic alliances in tourism*, Tourism and Hospitality: Planning & Development, vol. 2, no. 3, pp. 191–206.

Porter, M (1980). *Competitive Strategy: Techniques for Analysing Industries and competitors*. Macmillan, New York

Powell, T. **C**. (2001) *Competitive advantage: logical and philosophical considerations*, Strategic Management Journal, vol. 22, no. 9, pp. 875–88.

Regression Analysis, http://www.sixsigmafirst.com/regression.htm [Accessed 2007]

Saunders, M *et al* (2006) Research methods for business students. Pearson Publishing, Harlow.

Sinclair, M. (1998) *Tourism and economic development, The Journal of Development,* vol. 34, no.5, pp.1-51.

Statistical Median, http://mathworld.wolfram.com/StatisticalMedian.html [Accessed 2007]

Statistics behind the trends: Spain,   http://www.prayforspain.com/general/index5.html [Accessed 5th April 2007]

SQW Limited, (2003) Economic and social impact of no frills air services in the Highlands and Islands. [www] Available from: http://www.hie.co.uk/no-frills air-services.htm. [Accessed 08th December 2006]

Tourism based on figures, http://www.tourisme.gov.ma/english/5-Tourismechiffres/5 Arrivees-poste-frontieres/arrivees.htm [Accessed 14th & 20th March 2007].

Thomas Cook, Customer.relations@thomascook.com, 2007. RE: club 18-30.[online]. Message to J Touzni (cb03jjt@brunel.ac.uk). Sent Thursday 8 March 2007, 15:23. Available from : https://owa1.brunel.ac.uk/exchange/ [cited on 8 March 2007]

UN Environmental Program (1979), *cited* **Lea, J**. (1988) *Tourism and Development in the third world*, Routledge, London

Appendix 2: BIBLIOGRAPHY

Alam, I. (2003) *Commercial innovations from consulting engineering firms: an empirical Exploration of a novel source of new product ideas*, Journal of Product Innovation Management, vol. 20 no. 4, pp. 300-13.

Alamdari, F & Fagan, S (2004) *Impact of the Adherence to the Original Low-cost Model on the Profitability of Low-cost Airlines*, Transport Reviews, vol. 25, no. 3, pp.377-392

Ali, N & Holden, A, (2006) *Post-colonial Pakistani Mobilities: the Embodiment of the 'Myth of Return' in Tourism*, Mobilities, vol. 1, no. 2, pp.217-242

Ayala, H. (1995) *from quality product to eco product: will Fiji set a precedent, Tourism Management*, vol. 16, no. 1, pp. 39-47.

Barrett, S (1997) *The implications of the Ireland-UK airline deregulation for an EU internal market*, Journal of Air Transport Management, vol. 3, no. 2, pp.67-73

Baumol, W & Blinder, A (1991) Economics – Principles and Policy. HBJ Publishers, London

Binns, T & Nel, E (2002) *Tourism as a local development strategy in South Africa*, The Geographical Journal, vol.168, no.3, pp.235-247

Brophy, S & St. George, D (2003) *How Ryanair has exploited the Economic Theory behind Airline Contestability and Deregulation*, Student Economic Review, vol. 17, pp.245-257

Brouwer, L (2006) *Dutch Moroccan Websites: A Transnational Imagery?,* Journal of Ethnic and Migration Studies, vol.32, no.7, pp.1153-1168

Bruinsma, F *et al*., (2000) *Comparative study of hub airports in Europe: ticket prices, travel time and rescheduling costs*, Tijdschrift voor Economische en Sociale Geografie, vol 91, no. 3, pp.278-292

Busse, M (2002) *Firm Financial Condition and Airline Price Wars*, Rand Journal of Economics, vol.33, no.2, pp.298-318, *cited* **Fournier, G & Zuehlke, T** (2003) *Airline price wars with multi-market carrier contacts and low-cost carrier entrants*, Paper prepared for the International Industrial Organization Conference, Boston, Massachusetts, April 5-6, 2003

Calder, S. (2004) The Truth behind the Low-Cost Revolution in the Skies,1st Ed, Virgin books, London

Cherti, M (2007) *Second generation Moroccan Diaspora in London*. Private communication. Unpublished PHd thesis (not yet submitted to Westminster University).

Cole, S (2006) *Information and Empowerment: The Keys to Achieving Sustainable Tourism*, Journal of Sustainable Tourism, vol. 14, no. 6, pp.629-664

Creswell, J (2003) Research deign: Qualitative, Quantitative and Mixed Methods Approaches. Sage, London

Croes, R & Vanegas Sr, M (2005) *An econometric study of tourist arrivals in Aruba and its implications*, Tourism Management, vol 26, pp.879-890

Damuri, Y & Anas, T (2005) *Strategic Directions for ASEAN Airlines in a Globalizing World – The Emergence of Low Cost Carriers in South East Asia*, [www] Available from http://www.aadcp-repsf.org/docs/04-008FinalLCCs.pdf [accessed 28th March 2007]

Davies, B. (2003) *the role of quantitative and qualitative research in industrial studies of tourism*, International Journal of Tourism Research, vol. 5, no. 2, pp. 97–111.

Davy (2003) Ryanair Holdings Plc – purchase plan report; Davy Stockbrokers, [www] Available from: http://www.davy.ie. [Accessed 22nd February 2007]

Denzin, N. K. (1970) the Research Act: A Theoretical Introduction to Sociological Methods. Chicago, IL: Aldine.

Dillman, D. A. (2000) Mail and internet surveys: the tailored design method (2nd edn), Wiley, New York

Doganis, R (2001) The Airline business in the 21st century, Routledge, London *Cited* **Alamdari, F** & **Fagan, S** (2004) *Impact of the Adherence to the OriginalLow-cost Model on the Profitability of Low-cost Airlines*, Transport Reviews, vol. 25, no. 3, pp.377-392

Dresner, M *et al*., (1996) *The impact of low cost carriers on airport and route competition*, Journal of Transport Economics and Policy, vol.30, pp.309-328, *cited* **Barbot, C** (2004) *Price Competition amongst Low Cost Carriers*, CETE − Centro de Estudos de Economia Industrial, do Trabalho e da Empresa Research Center on Industrial, Labour and Managerial Economics, *available from* [www] http://www.fep.up.pt /investigacao/cete/papers/index.html, [*accessed 28th March 2007*]

Easterby-smith *et al*. (2002) Management research: an introduction (2nd edn), Sage, London

European Low Fares Airline Association (ELFAA), (2004) *Liberalisation of European Air Transport: The Benefits of Low Fares Airlines to Consumers, Airports, Regions and the Environment*. European Low Fares Airline Association, Bruxelles, Belgium

Euromonitor (2006) Travel and Tourism – Morocco, September 2006

Forsyth, M (2006) *Martin Kunz Memorial Lecture. Tourism Benefits and Aviation policy*, Journal of Air transport Management, vol 12, pp.3-13

Goymen, K (2000) *Tourism and Governance in Turkey*, Annals of Tourism Research, vol.27, no.4, pp.1025-1048

Graham, A (2006) *Have the major forces driving leisure airline traffic changed?*, Journal of Air Transport Management, vol. 12, pp.14-20

Grummitt, J. (1980) Interview Skills. Industrial Society, London

Hondagneu-Sotelo, P & Avila, E (1997) *I'm here, but I'm there: the meanings of Latina transnational motherhood*, Gender and Society, vol. 11, no. 5, pp.548-571 *cited* **Kofman, E** (2004) *Family related Migration: A critical review of European studies*, Journal of Ethnic and Migration Studies, vol.30, no. 2, pp.243-262

Hong, S & Harker, P (1992) *Air traffic network equilibrium: Toward frequency,price and slot priority analysis*, Transportation Research, vol.26, no.4, pp.307-323, *cited* **Adler, N & Smilowitz, K** (2007) *Hub-and-spoke network alliances and mergers: Price location competition in the airline industry*, Transportation Research Part B, vol.41, pp.394-409.

Hooper, P (1997) *Liberalisation of the airline industry in India*, Journal of Air Transport Management, vol. 3, no. 3, pp.115-123

Huang, D (1970), Regression and econometric methods. John Wiley & Sons, Inc. New York

Hussey, J and Hussey, R (1997), Business research. A practical guide for undergraduate and postgraduate students. Macmillan Business, Basingstoke

Jankowicz, A. D. (2005) Business research projects (4th edn), Business Press Thomson Learning, London

Krump (1998) *Effect of GM-CSF on leukotriene B-4 synthesis in human neutrophils: facilitation of the priming effect by autologous plasma*, Advanced Exp. Med. Biol, vol.400, pp.583-587

Lafferty, G & **van Fossen** (2001) *Integrating the tourism industry: problems and strategies*, Tourism Management, vol.22, 11-19

Lea, J (1998) Tourism and Development in the Third World, Routledge, UK

Mansfeld, Y (1992) *Group-differentiated Perceptions of Social Impacts Related to Tourism Development*, Professional Geographer, vol.44, no.4, pp.377-392

Mason, K (2000) Marketing low cost airline services to business travellers, Cranfield University, Air Transport Group, Cranfield, UK

Morocco & tourism, (2007) [www] http://www.american.edu/TED/moroccotour.htm. [Accessed 25th March 2007]

MRT (2007) The Moroccan Charter of Responsible Tourism. The Moroccan Committee of Responsible Tourism, Casablanca, Morocco.

Pearce, P (1995) *From culture shock and cultural arrogance to cultural exchange: Ideas towards sustainable socio-cultural tourism*, Journal of sustainable Tourism,

vol. 3, no.3, pp.143-54, *cited* **Cole, S** (2006) *Information and Empowerment: The Keys to Achieving Sustainable Tourism*, Journal of Sustainable Tourism, vol. 14, no. 6, pp.629-664

Pearce, P *et al.*, (1998) *Facilitating tourist-host social interaction. An overview and assessment of the cultural assimilator. In E. Lawas, B. Faulkner and G. Moscardo (eds) Embracing and Managing change in Tourism* (pp. 347-64). Routledge, London *cited* **Cole, S** (2006) *Information and Empowerment: The Keys to Achieving Sustainable Tourism*, Journal of Sustainable Tourism, vol. 14, no. 6, pp.629-664

Pels, E & Rietveld, P (2004) *Airline pricing behaviour in the London-Paris Market*, Journal of Air Transport Management, vol.10, pp.279-283

Raguraman, K (1997) *Estimating the net economic impact of air services,* Annals of Tourism Research, vol. 24, no. 3, pp.658-671

Ross, L (1997) *When Will an Airline Stand its Ground? An Analysis of Fare Wars*, International Journal of Economics and Business, vol.4, no.2, pp.109-127, *cited* **Fournier, G & Zuehlke, T** (2003) *Airline price wars with multi-market carrier contacts and low-cost carrier entrants*, Paper prepared for the International Industrial Organization Conference, Boston, Massachusetts, April 5-6, 2003

Schipper, Y *et al.*, (2006) *Deregulation and welfare in airline markets: An analysis of frequency equilibria*, European Journal of Operational Research, vol.178,pp.194-206

Sieber, S (1973) *The integration of Field Work and Survey Methods*, American Journal of Sociology, vol. 78, pp.1,335-1,359

Silverman, D (2001) Interpreting Qualitative Data: Methods for Analysing Talk, Text and Interaction. Sage, London

Springer, B (1995) *Guyanese journalist calls for Diaspora development*. The New York Amsterdam News, December 8-14

Tashakkori, A. and Teddlie, C. (2003) Handbook of Mixed Method in Social and Behavioural Research. Thousand Oaks, CA: Sage.

Tourism for Prosperity and Peace, http://www.unwto.org/aboutwto/eng/menu.html [Accessed 22nd February 2007].

Witmer, D. F. *et al.* (1999), From paper and pen to screen and keyboard: towards a methodology for survey research on the internet, *in* Jones, S., Doing internet research, Sage, Thousand Oaks, CA.

Worthington, I *et al,.* (2005) Economics for Business – Blending Theory and Practice. Prentice Hall, Harlow, UK.

Van der Veer, P (1995) *The Diasporic imagination*, in Van der Veer, P (ed.) *Nation and Migration, the Politics of Space in the South Asian Diaspora*, Philadelphia: University of Pennsylvania Press, *cited* **Salih, R** (2001) *Moroccan migrant women: transnationalism, nation-states and gender*, Journal of Ethnic and Migration Studies, vol. 27, no. 4, pp.655-671

Van der Zwan, J. 'The phenomenon of low-cost carriers'. [www] http://www.jvdz.net/index2.html. [Accessed 25th November 2006]

Voigt-Graf, C (2005) *The Construction of Transnational Spaces by Indian Migrants in Australia*, Journal of Ethnic and Migration studies, vol. 31, no. 2, pp.365 384

Viken, A *et al.*, (1999) *Responsible tourism: Moving from concepts to action.* 8th Nordic Tourism Symposium, Alta, Norway, 18-21 November, *cited* **Cole, S** (2006) *Information and Empowerment: The Keys to Achieving Sustainable Tourism*, Journal of Sustainable Tourism, vol. 14, no. 6, pp.629-664

Yeoh, B *et al* (2002) *Migration and family relations in the Asia Pacific*, Asia and Pacific Migration Journal, vol. 11, no.1, pp.1-11, *cited* **Kofman, E** (2004) *Family related Migration: A critical review of European studies*, Journal of Ethnic and Migration Studies, vol.30, no. 2, pp.243-262

Youth Holidays-UK, Mintel, [www] Available from: http://www.marketresearch.com/map/prod/1126298.html. [Accessed 22nd February 2007]

Zikmund, W. G. (2000) Business research methods (6th edn), Dryden Press, Fort Worth

Appendix 3: Interview Transcript – Interviewee 1

Interview transcript

Embassy of the Kingdom of Morocco
Minister Counsellor (Economic attaché)
Thursday 15th March 2007

Interviewee - LB
Interviewer - JT

JT **can you tell me a little about the tourism policy and its impact on economic development?**

LB well, Morocco is a country placed strategically next to Europe. We are only 14km from the coast of Spain and have very good relations with the European Union. We have been receiving a number of tourists to Morocco and we felt that we were not addressing their needs particularly. Currently tourism only contributes 7.7% to current GDP; this is a small proportion in comparison to other industries like agriculture and manufacturing…

JT **aaahh ok, so why is Morocco concentrating on tourism then?**

LB we have a lot of potential to expand this sector of the economy, and its implications are vast. Tourism is not just one industry; it incorporates a lot and can generate a lot of business for the country and increase our reputation. Its effects on employment levels, a key indicator of the success of the macroeconomic condition of a country is vast by creating both direct and indirect jobs

JT **yes, I have come across some legislation which claims that tourism could generate up to 600,000 jobs…**

LB 600,000 only direct jobs, the indirect jobs cannot be statistically identified appropriately; however we know the impact is great. Our current unemployment is about 11% and we need to reduce this…

JT **by employing an extra 600,000 people, unemployment would be reduced by about 3 to 4%...**

LB yes, but once again this is only direct employment, tourism has far reaching consequences further than any other industry and because it is a national initiative you will begin to see movements to mass employment at both low-skilled jobs but also at higher skilled jobs and positions and we hope that many of those employed will be Moroccans who can contribute to their economy, so it is all about empowerment from our point of view and sustainability of employment. That's why we are concentrating on such a diverse range of tourism initiatives; there is a lot of tourism potential we could exploit. So far we have been concentrating high-level tourism, a number of 4 and 45 star hotels existed in the 1970's and 1980's and Morocco had a great reputation, in fact when countries like Tunisia and Spain were attracting ass tourism, we were attracting much less, but our tourism receipts were far greater, this was proof that our tourism basis was valid. But we have to expand the market; we have not been taking advantage of our beaches and other resorts like we should have. This was a problem and we have identified it. We also want to bring greater competition, we want our organisations to be able to compete on an international level, and we want Morocco to be recognised, so tourism has far reaching consequences that you may consider. Err, if you just consider that tourism accounts for only 7.7% we hope that this figure is doubled by the time we finish our projects which are currently in place

JT **so Morocco is aiming for 14% GDP contribution of tourism…**

LB   yes, it is easily achievable; we are ambitiously contributing to the r. Funding which wasn't previously available now is, and that is the most important aspect now, getting the money to the right projects and getting them complete on time and on budget. We have been contacted by a number of European and Arab companies who wish to invest in Morocco and we are giving them incentives in order to carry out their projects. And back to employment, these projects empower the local people to work and thus we hope that we can contribute to the economic development of Morocco in this way.

JT   how about in terms of specific types of tourism…

LB   well this is very important, because we have been attracting the high spenders so far, but we want to open the market to the other more important markets which we haven't concentrated on such as mass beach tourism. This is a section of Morocco we have only exploited in Agadir, but with the 'plan Azure' in place we hope that we can build a further six resorts to accommodate such huge influxes of tourists we anticipate.

JT   **so we are moving from specific tourism to mass tourism…is this good?**

LB   yes it is, but we are careful at the same time, we realise the implications of inviting such a diverse range of people to our country, and we are aware of this. When we say mass tourism we want people to appreciate our culture and appreciate our way of life. In Marrakech and Fez they can see the cultural sites of Morocco and history and understand the growth of civilisation. We want this appreciation. And then they could go to the beach and appreciate our natural beauty of the sand and water. Then we also have the mountains and trekking…so we have everything they need as tourists, we just need to market it properly and allow them access

JT   **by access you mean deregulating the airline industry**

LB   this is just one step and this is very important, we need to allow them to enter Morocco and we need to make it as cheap and convenient as possible. And by opening the skies we can achieve this through competition. And we have had a great response form European airlines who want to enter Morocco. They know we have a market here and they know that the European people like Morocco, so they want to exploit this market as well.

JT   **but is this good**

LB   yes it is, but like I said before we need to police this appropriately. We are not keen to attract people who want to destroy our land, but we want people to respect our culture and values and have a good time at the same time.

JT   **so why not concentrate on only Moroccans living abroad**

LB   well we have incorporated them into our plans. They are very important to us, their remittances have increased over the last few years and this is very important for our development as a country. We also value their skills in contributing to their local economy. At the end of the day they are Moroccans too, but also tourists

JT   **what do you mean?**

LB   Moroccans like you who were born abroad have followed the traits of their colleagues abroad. You want resorts and you want to have a holiday. So for you we want to incorporate this too. It is not just about family but it is about having a holiday too and bringing your friends. This is also important. Sustainability. We want the tourists to come and bring their friends. Areas like Saidia in the north of Morocco where 35% of the houses have been bought by British families. This is a large amount, and we have realised they are investing in two bedroom property. We have spoken to the developers and most apartments are being sold with one master bedroom and a bedroom for two kids. This is a sign that our family based strategy is working. These kinds of tourists want the culture and also the beach. And we can provide both in the same place. Their investment in property also means that they would regularly visit Morocco so this is what we want as well. Frequency is important for the economy to be sustained. So like I said, tourism is being attributed to further impact that just short-term contributions.

JT	**so what about the other sectors we mentioned before like agriculture?**
LB	yes, they are also important. Tourism is only one part of the economy and we cannot rely on it forever. It is a volatile industry so we have also begun investing in other sectors which are also important. We should dismiss agriculture or manufacturing. Morocco has a lot of opportunity to contribute on all fronts. Tourism though is what connects us to the world.
JT	**how about inflation in macroeconomic terms**
LB	well there is no connection to tourism for inflation in our eyes. Inflation for Morocco has been affected by the price of oil. But we have been able to reduce this cost and this is impacting on our inflation figure of 2.5%. Tourism has no connection with this.
JT	**ok, so what's the most important macroeconomic factors which influence tourism development and the strategies currently in place?**
LB	well the key for us is unemployment and training. We want to reduce the number of unemployed people. We have been building the schools to teach tourism and the like and we want to see a contribution to our economy as a sign of success. Indirect employment is important also but we cannot put an exact figure to this. Direct employment is 600,000 people but indirect could impact much more. We are looking to stabilise the economy and exploit all our strategic opportunities which we haven't been able to do before due to lack of funding. But we have a number of interested partied who are keen on developing infrastructure in Morocco and this is a good sign. We are moving forward
JT	**so how about the impact of deregulation**
LB	well this is a good sign. We introduced policy to improve our transport links for tourists. And the low cost airlines are taking advantage of this. Their European market is reaching maturity and we are a new market which can bring significant benefits to their business.
JT	**how about the impact on tourists already visiting Morocco, like those who have family in Morocco**
LB	this is an important market too. By introducing competition to the market, we are inviting airlines to fly new routes and therefore increase capacity. Also our Moroccans living abroad will start coming to Morocco more frequently. So by improving access to the region we are hoping they would want to rekindle their Moroccan spirit also.
JT	**is there a relationship with remittance which incidentally contributes the same amount as tourism currently does, around 8% of GDP**
LB	well…eerrmm…there is no specific relationship with tourism is there…
JT	**well not general tourism, but Moroccans living abroad**
LB	yes…with this in mind…err…it is something we do not want to miss as an opportunity. If you mean a relationship such as by Moroccans living abroad coming over more frequently then also sending money, then this is important also. Remittances have risen recently but we should be aiming to increase this. The problem is that a lot of Moroccans coming into Morocco bring cash with them instead of bank transfers. Therefore we do not actually see this money come across in the traditional systems which we derive statistics from. Therefore we realise that there is a contribution and we like this as it will inevitably improve the economy at least regionally, however we cannot measure this appropriately and this is a problem. But remittance and investment back into Morocco by Moroccans living abroad is important, but we do not want to stop there. The skills Moroccans learn abroad are also important for us, such as management skills and the like. We need these kinds of skills and we need them fast and we need Moroccans to contribute. So, with that, encouraging them to travel more frequently to Morocco is important even if it doesn't show directly on our GDP figures. But whether its Moroccans or non-Moroccans, tourism doesn't discriminate. We want sustainability which allows us to reflect our culture and pride as well our welcoming attitude to the world. So we want our tourists

to have a great time, enjoy it and then bring their friends. That's what we want Morocco to be. A good time and a happy memory.

JT **ok then, that's great. Thanks a lot for your time.**

End of interview

Appendix 4: Interview Transcript – Interviewee 2

Interview transcript

Ministry of Tourism – Tanger, Morocco
Regional Director – Tanger-Tetouan region
Monday 26th February 2007

Interviewee - RI
Interviewer - JT

JT **the framework agreement signed in 2001 doesn't mention any type of specified market segments for tourism; it doesn't seem to cater for Moroccans living in Europe who spend a lot of money coming back to Morocco on an annual basis?**

RI yes, well the framework agreement is a long term general vision. It is for all tourists and Moroccans living abroad actually travel into Morocco as tourists, they are not differentiated in anyway from other tourists so they too are covered by the initiatives put forward. Actually they also will benefit greatly from a lot of the initiatives in place especially since they are regular travellers. Cheaper air tickers, cheaper hotels, better quality of holiday, better facilities. So although not specifically mentioned, they too have an opportunity to benefit. In the longer term part of the framework agreement will be geared towards Moroccans living abroad as we do want to encourage them to visit us and invest in their home country. We realise the implications that they bring and the benefits of the money which they spend in Morocco and this is important. But the framework agreement is still in early stages and now we are attracting mass tourism, but still trying to ensure we make the most out of the tourist receipts and at the same time the tourists have a good time and our residents also feel a contribution to their culture and working life. We hope to be building links with tour operators who can bring in the mass tourists and we are trying to build services to accommodate these tourism segments as well as our Moroccans living abroad who can take part in these tour operator-style strategies.

JT **in terms of tour operators, why is this the main approach?**

RI well the issue is that we are building large hotels and we want to build reputable relations with the hotel managers and the tour operators who block book a significant part of the hotel rooms, and thus we can guarantee an income to the hotel whether or not the room is occupied as the tour operator would pay in advance for the bookings. This is illustrated by the building of six new resorts alongside the beaches of the Atlantic and the Mediterranean where we hope we can accommodate most of these tourists when they come. So we will be centralising their experiences. Everything they want in one place. So these resorts will include entertainment and food and obviously the beach if they want it.

JT **is there a specific type of market aimed at such as a specific country? Morocco currently gets a large portion of its market from France…**

RI well in Tanger-Tetouan we realise that British tourism is impacting much more than other tourists from other countries. In fact recently we have seen a 41% jump in the number of tourists originating from the United Kingdom. This is a huge increase and this is positive. And this is proof that the framework agreement is working. Our other markets such as France and Belgium are almost stable or even stagnant. There is little change from the numbers we receive annually. Though this is contributed heavily by the Moroccans who travel every year during the holidays to be with their family. With the British, we don't have many Moroccans living there in comparison to the European continent but we are aiming at a market which we haven't exploited properly and the British have a lot of money to spend. We want them to spend it with

us and have a good time. This is important. But of course, we want them to contribute positively to our culture. We have been approached recently by companies like 'Hampton's international' based in London who are keen to invest in Morocco. They realise the ability of Morocco to attract all kinds of tourists, from culture seekers to the beach-goers who want to have some fun in the sun. Emaar, the investment firm from the Emirates is also working alongside 'Hampton's international' in purchasing residential property and building apartment blocks themselves. This is proof though that we are not just getting tourists from the European side but also from the Arab side. So we are spreading our risk and inviting all to enjoy Morocco and the wonders of this country. It can also be seen as a west meets east experience. But the greatest thing is that we are on the door step of Europe.

JT   **so Morocco is taking a mass tourism approach…inviting all?**

RI   well, you cannot say that, because we are selective in who we want. And this is all down to advertising. We advertise specific locations for specific reasons, some tourism advertisers for Morocco aim for understanding the 'couples' atmosphere and we try to create this in cities like Marrakesh, and others aim for the 'family' segment like that of Tanger. However we don't want to invite people who disrespect our culture. This is important. We want them to appreciate our way of life and we want them to know that we are hospitable people who are welcoming. This is important for us and we want to portray ourselves like we are.

JT   **in terms of the open skies, is this the best way of bringing forward the aviation industry and increasing frequency?**

RI   of course it is. We are building competition, and through competition we can make the companies attract more visitors through their pricing strategies. Thus we all benefit, the visitor gets a cheap ticket and we get a visitor who can spend the money they have saved. So we want the low-cost airlines like Ryanair and Easyjet and Jet4U to fly to Morocco. We have enough airports to accommodate them. And we have a big enough market we feel. And the tickets should be at competitive prices.

JT   **so mass tourism is affected by elasticity of price of the return air ticket?**

RI   of course this is important but we do not want to discount the impact of our good relations with current tourists. Like you said, Moroccans living abroad are important to us. They spend a lot of their money here in Morocco and they send lots of money too. This is a good sign of our values being transferred to other cultures and we realise that they remain Moroccans even in other countries. So we want to reduce the price of return-air tickets to attract our current tourists more times a year. But when it comes to statistics we do not differentiate between Moroccans or non-Moroccans and we appreciate this. Our tourism product is general to those who appreciate our culture whether Moroccan or not. But the importance is the open skies agreement for us. We want the airlines to fly here at competitive prices so that tourists will want to visit Morocco. And we want to increase their possibly of access. In terms of my region alone, Tanger Tetouan, we hope to bring the low-cost carrier model by 2008. By then we would have had the infrastructure in place to accommodate all the new tourists who will arrive. We have renovated a number of hotels

JT   **yes, I have noticed that while in Morocco…**

RI   well that's great, because we want to recreate the wonderful years of the late 1970's and 1980's when Morocco was the place to be

JT   **yes, I have heard they were the wonder years**

RI   of course, we had great publicity. We had the celebrities here and we had the infrastructure, but now, we are renovating everything. We want to modernise our facilities. We are giving companies the best chance to take advantage of the many opportunities we have. We want the hotels to upgrade their systems and their decorations and we want them to provide a welcoming place for tourists. We want them to be modern and learn from their European counterparts. And innovate. This is important for us as a country in moving forward.

JT   **so how do the Moroccans living abroad gain from this?**

RI   well inevitably, the mass tourism culture will bring down prices of air tickets, and this will provide access opportunities for Moroccans living abroad. So instead of now just coming once during the summer, they can afford to come here during the year too. And when they come they will spend money. It's wonderful for our economy. Tourists need to sleep, they need to eat, and they need to be entertained. This is important for them all. And these contribute to other sectors of the economy. So tourism brings benefits to all. Thus it also brings benefits to Moroccans abroad or not. The community benefits too, so if Moroccans get the right visas they can cross over to Europe and this would be a good thing for them.

JT   **what about the social effects of tourism? It's not all good**

RI   well the types of tourists we attract are high class. Even the mass tourists we aim at are families, much like the Moroccan families living abroad. So when they come they have family values. We don't want to invite those corporate parties who want to trash our beautiful cities. We want them to appreciate all the effort we have done to make sure they have a good time. This is also important for us. Cultural understandings. The social effects of tourism are important also for us. Through tourism initiatives we can improve infrastructure. And when the tourists leave who benefits? Well the local people of course. They can take advantage of all these great blessings we have provided. Better roads, better transport, better facilities. So we are looking for legacy as an important issue here. We need to accept modernisation and globalisation. We are in the 21st century; we should move forward and accept cultural integration

JT   **does that mean we forget our cultural values**

RI   of course not, but we must be open to others. The problems are if we are not open to them at all. Because if we are not they will simply go somewhere else and forget us. And this is not good for the economy. Anyway, Morocco has a great strategic location and we have this to our advantage. All we have to do is make the most of it and understand that we are blessed with such a strategic position. On the edge of Africa and on the border of Europe. We can attract all kinds of tourism if we want. But of course, like I said we want to keep some tourists out of our country. Marrakech did have a small reputation for sex tourism. We do not want this, but these are bad habits form bad people who want to corrupt us. We don't want them here. The problem was never as bad as Thailand. But nonetheless we do not welcome any sort of tourism like that which seeks to exploit our people. We want to welcome people who appreciate us, our values and our families. This is the most important thing for us. Maybe if you have a discussion with the ministry of tourism in London they can expand more on this. I'm not sure what kinds of tourists specifically originate from the United Kingdom but we welcome all those who respect our values. And we will respect their too. Our main problem now is we have opened the skies to competition but we haven't completed building the infrastructure in all our cities. But the results are positive so far from Marrakech and Fes. We have a significant number of tourists entering through their respective airports. What is great about this is that they all spend money while on holiday. As soon as we get enough hotels and renovate them in the Tanger region, we will be inviting airlines to start services. We are improving the airport, we are building a new terminal and we want to bring in new passengers. Tanger has the capability of attracting much more tourists and we want to do this also. But it is not just air policy. We have built a specific sea-port for commercial use away from the city. And this is important for us as we want to keep the current sea-port for tourism and we want Tanger to be a stopping point for cruises around the Mediterranean. So that the tourists can hop off here and spend money. This is important also. The link between money and spending and cheap ways of getting to Morocco.

JT   **how will Moroccans be incorporated into this plan?**

RI   well like I said before they already are as they are classed as tourists. The issue with Moroccans living in Europe is that they have family here so they don't spend time in hotels. They spend time with family so their statistics are not caught. Therefore we

cannot triangulate their movement figures like that of non-Moroccans who spend time in hotels. Then we could calculate their stays per week and the important factor of money spent while in the hotel form additional services like traditional Moroccans restaurants and traditional entertainment methods.

JT   **it appears that pricing is an important factor for tourists?**

RI   of course, tourism is now a global industry. We are no longer fighting got tourists who want to go to the Mediterranean region; we are fighting to stop them from going to other eastern European countries and the Middle East. What we are saying is that we are closer than all these other places and it is cheap to get here and we will give u what ever u want in terms of tourism. Whether you want culture or beach. We can cater for your needs. It's important to count in the globalisation issue. But also the speed of the internet and how it has impacted this. We need to understand these modernising issues which have come up. They contribute to the success of Morocco as a tourist destination. What's great as well is that we have the Moroccan banks on our side. They too realise the market we are creating and they are providing products for tourists and Moroccans who can take advantage of their lending arrangements for property and business development.

JT   **thank you for your time. That's it.**

End of interview

Appendix 5: Interview Transcript – Interviewee 3

Interview transcript

Ministry of Tourism – London, United Kingdom
Trade & media officer – United Kingdom & Ireland
Tuesday 13th March 2007

Interviewee - AM
Interviewer - JT

JT	**thanks for taking the time to see me today at such short notice, so how is everything going in the London office for tourism in Morocco?**
AM	its really really busy. We are getting people coming in everyday asking for events in Morocco and even more call by phone. We also get constant emails about events. The British public is interested in Morocco, we are strategically placed very close to the major European cities and with the introduction of low cost airlines we are anticipating and have already realised a large influx of extra visitors especially for short breaks usually associated with intra-European travel, who may have considered Morocco before but had never had the money to visit our country.
JT	**yes, I have seen flights being advertised for very cheap**
AM	we are concentrating on getting the tourists into Morocco. We want them to experience it first hand and enjoy it, rather than just hear about it on the news and travel channels.
JT	**so you just want them to come and that's it?**
AM	of course not! We want them to come and spend their money with us. We want them to tell their friends and for them to bring their friends. We are making big avenues with this regard. We are allowing non-Moroccans greater flexibility in Morocco. A lot of them want holiday homes and apartments…so we are building them. And not just in one place. All over the country and this is the important thing for Morocco. It's a national initiative not just a regional one in a specific location. And that's the beauty of Morocco. We have the beaches and we have the mountains. All within a few hours from each other. So one moment you could be in Agadir on the beach and then in the evening you would have arrived in Marrakech at the foot of the Atlas. This is a great opportunity which we have not exploited yet
JT	**so Morocco is trying to get all different types of tourists then?**
AM	yes, we are trying to get tourist who want to enjoy the Moroccan way of life. This is important as well. We want them to come and visit us and respect us. The worse thing that could happen is if they come to our hotels, and bring their duty free food and drink from the airport and just stay cooped up in the hotel. We wouldn't want that because they won't be contributing to the community and economy as we want them to. We want the tourists to come and use the hotels to sleep in and for the rest of the day explore the wonders we have to offer. This is important for us. We also want to sustain this level of tourism so by buying a second home in Morocco we can almost guarantee that they will return year after year. And this is a great opportunity for us and to develop our economy. The more times they come, the more they spend. So our advertising budgets try to accommodate this kind of long term prospects. After a while it's no longer about big advertisements. It's all about people making up their mind to travel to Morocco again. So not just one experience but many experiences. And to bring their friends too. We are specialising different cities for different tourism types. Agadir has long been known for surfing and beach style sports, Marrakech is for young couples or those celebrating their anniversaries and Saidia is for families. So we are trying to cater for every type of tourism which we think can

contribute to the economy in a positive way. In Saidia we want to continue developing family based accommodation. Those that have already invested in property there have already created links with the community and their children; this could be the beginning of a better kind of social integration and understanding between Moroccan and European Children.

JT   **so in order to stimulate this demand, the deregulation of the airline industry occurred.**

AM   yes, this was the most important step. If you can't afford to go somewhere once, why would you go there twice? It's a simple question and answer. We want to provide the opportunities and we want to reap the benefits as well. It's all about the local economic boost. We want to create local jobs and local opportunities for our population and this appears to be the best way forward.

JT   **but this tourism may cause a confrontation for the local values and customs, Morocco is traditionally a Muslim country, how about alcohol?**

AM   we need to modernise our system and appreciate other points of view. We still want to hold on to our core values but if tourists want to think then as long as its in appropriate places like the bar or restaurant or the like then its fine, we don't want them drinking in the streets though. Of course not. And the worse thing like I said would be if they buy alcohol from duty free and just stay in their hotel rooms, then it wouldn't be nice for the economy and we wouldn't be achieving much. We do not want this. We want responsible tourism and an appreciative tourist. We have a number of policies about responsible tourism. In fact we have a whole charter and we have an event coming up in April which will discuss responsible tourism. We will be inviting the airlines and tour operators to sign a responsible tourism charter which commits them to build links with the community within which they operate, so that the cultural environment is kept in good condition for future generations. However this change needs to embrace by the industry itself such as the hotels which were built in the 1970s and 1980s. Some of them haven't even changed their décor since then and this is a problem. When we speak to them they say they don't have any money, so we have been speaking to banks and other organisations to begin joint initiatives to address these kinds of issues and renovate these hotels. As soon as we do this we can make the tourism experience better for the tourist and for the local community who can be empowered by the jobs they undertake.

JT   **how about in terms of the airlines?**

AM   this is an important part too. Actually Easyjet first approached us in 2002 and they said they might be interested in flying to Morocco. But they were not too keen as we hadn't even started on the infrastructure just yet. They said they would reconsider us at the earliest in 2007…but they saw the opportunity a year earlier so in 2006 they started negotiations and as soon as they were complete their first flights began to Marrakech. This was great news and great publicity and this is what we needed. It's funny how royal air Maroc can start their own low-cost airline, Atlas-blue, and not have a dramatic impact on the market, but as soon as Easyjet comes in the market begins picking up. The Easyjet brand is huge in the United Kingdom and Europe and we are sure that they will begin flying elsewhere in Morocco soon. They already have a Casablanca-Madrid link and the London Luton-Marrakech link and we are sure they will begin else where. Ryanair have also started flying to Fez and Marrakech. This was great news for Morocco. The two most reputable brands in the low-cost market are flying to Morocco and we anticipate that they won't be the last. We have already been approached by TUI to fly from the United Kingdom; they already do so from Belgium and France…so the market is expanding for us

JT   **sounds like great news then?**

AM   of course it is for us, the more people that come the more money they bring. Easyjet underestimated us and then re-tracked and came a year earlier than planned. This is proof we are doing some really good things in Morocco. Both these airlines could be

flying to Tangiers the next busiest airport in Morocco by 2008 and this will be great for tourists both Moroccan and non-Moroccans

JT   **so is there a drive for More British tourists?**

AM   of course there is. Currently only about a handful travel to Morocco from the United Kingdom which explains why our marketing budgets aren't that great, about 300,000 tourists last year, in comparison to a couple of million from both France and Belgium, our two biggest markets.

JT   **how about second generation Moroccans living in the United Kingdom?**

AM   well Moroccans generally have a greater portion of the population in France and Belgium. Therefore we even have policies and incentives in place which encourage them to travel back home to visit the land of their forefathers. We give them substantial discount for using hotels and services in Morocco because we want them to experience these services as well as they too are tourists for our economy and they introduce a lot of money into the economy. The reason though why we had to bring this into play is due to the bad experiences of many of the 1st generation migrants who moved abroad. They got used to travelling by car to Morocco as it was the most cheapest method and they used to get very tired on the three day journey form most European cities as often travel involved going through France and Spain, so by us introducing these incentives we are saying thanks for going through the pain but now we want you to enjoy yourselves. So we are trying to dynamically change the image of Morocco not only in the face of non-Moroccans but also in the face of Moroccans. We also want them to teach their kids about their culture where they were born. We want to instil a pride of being Moroccan and a pride of our tourist initiatives that we have. So that we can sustain Morocco as a developing economy in the world.

JT   **so it's all about changing images from the past then when things were not done properly?**

AM   well you can't really say it was their fault or ours. Moroccans living abroad were low-skilled uneducated people so on the living they earned they couldn't exactly transport their whole families back home by plane and those days it was really expensive anyway. But you can look at Spain as an example of changing its image from beach mass tourism to cultural tourism. They have exploited the beach market and they feel the market is mature, they have enough investments going on at the moment but they have realised that the market they haven't been able to capture is the cultural market, so if you see all their advertisements now are about Andalucía and how cultural it is. Its no longer about beach holidays, it's about cultural understanding. Spain appears to be having a problem with the mass tourists they attract. So where we are saying yes to mass tourism, we are also saying look after our land and culture as well and appreciate the peace, however Spain in the early 1990s was saying just come, we have the beaches, we have the climate, just come and party. And that is what it has become. A huge party place for low-class tourists who don't contribute positively to the environment. It's interesting when you consider the cross-section of the British tourist. 65 million travelled abroad last year in 2006. Fifteen million to Spain, and then followed closely by France and then about eight million to the United States. Morocco was very little of this travel trend. Morocco has to learn form this and concentrate on the changing demographics of tourists and concentrate on the tourists who want to contribute to our society as well as have a great time. And that's important, an appreciation of culture. Which is why we are also encouraging weekend breaks. We are close enough to Europe for the short trips to our cities and we have both Beaches and Culture. So they can enjoy what they want.

JT   **so where does deregulation come into it?**

AM   well this is important to do with access to our airports and the like. Also from the United Kingdom Royal Air Maroc, the Moroccan flag carrier and British Airways have enjoyed the bilateral rights of being the only airlines to fly between the United Kingdom and Morocco. They have charged people a lot of money and they have kept the tourist destinations closed for the vast majority of people. Through deregulation

we will let the market take control. This will lead to greater frequency and greater price cuts through competition. And this can only be good for the consumer, though maybe not for British Airways and Royal Air Maroc who now have to share the market with airlines like Easyjet…

JT   yeah iv seen flights to Marrakech heavily reduced…

AM   …and Ryanair. Just looking at flights to Marrakech like you said…well pre deregulation we didn't have fares starting at around £50 return…these are wonderful prices and they are cheap and this is because of competition. There are flights to Marrakech by Ryanair, Easyjet, Thomsonfly and the usual British Airways and Royal Air Maroc, who are even competing with their own subsidiary airline Atlas-Blue. So the competition is working. Ryanair now even fly to Fes…who would have thought that. Ryanair in fez is wonderful news. Morocco has a number of airports which can accept and readily accommodate the new tourist arrivals, but we need to attract the airlines and deregulation is the way to do this. Easyjet have even started flying from Madrid to Casablanca. Royal Air Maroc is in for a hard time. But this is needed. A good shake up of the industry to improve efficiency of the airline network and competition. The consumer wins at the end of the day. And so does the economy, because with greater tourists in Morocco, the greater money gets spent. What's great about this deregulation is that we are the first African country to begin the deregulation process. Tunisia on the other hand only has three scheduled flights a week to their country and the rest is all charter visitors. We are moving rapidly ahead of our competitors in the tourism industry.

JT   how about Moroccans living abroad…

AM   well with Moroccans living abroad we have a different market altogether I think. They already come to Morocco but we need them to come more. They may not necessarily want to come to the tourist areas like Agadir and Marrakech and we want to change this. We want them to come to our tourist sites and have a good time in their country but this is usually impacted by them wanting to go and visit family instead which is understandable. But we want to change this. So if you come to Morocco to visit family once a year, we want them to come twice or three times a year. Once for family, once for skiing and another time for the beach. We have a lot of advantages which can be taken care of, but sometimes its just ignorance and people don't know and it is our job to inform them. For 1st generation migrants to Morocco, the myth of return for them is about visiting family and coming back to a place where their memories may not all be one hundred percent happy. But we want their kids to turn around and say that they had a great time and the chain continues like this. Our budget for tourism expenditure and advertising is increasing so we are trying to attract the whole market by drawing attention to ourselves but at the same time segmenting the market by specialising in resorts and special facilities like romantic locations in Marrakech and family holiday homes in Saidia. But what's important is to understand that tourism encompasses all visitors to the kingdom. Moroccans and non-Moroccans benefit at the same time and this is good for our economy. British tourists travel more; they have no beaches in comparison to southern Europe and North Africa so they are a market which is very important to the southern European countries including Morocco. The British also do not have any sort of national initiative such as the French who actively try to insist that their nationals only travel within France or French territories. This is in order to keep the money within the country.

JT   thanks for your time.

End of interview

Appendix 6: Travel habit questionnaire – 2nd generation Moroccans in UK – final version (*for electronic version: www.mos3ab.net/jawad.html*)

I am a student at Brunel University conducting research on the travel habits of 2nd generation Moroccans living in the United Kingdom with regards to visiting Morocco. I would kindly request you participate in a short questionnaire highlighting your reflections on past travel and future plans to travel to Morocco. All information is completely anonymous and strictly confidential.

Please Tick Appropriate Boxes and Specify when Ticking 'Other'

Demographic

1. How old are you?

   18-20 years   21-23 years   24-26 years   27-29 years   30 years
   ☐   ☐   ☐   ☐   ☐

2. How would you describe your Gender?

   Male   Female
   ☐   ☐

3. What is your Current Economic Status?

   Working full-time (over   Working part-time   Unemployed &   student   other
   30hrs week)   (under 30hrs   seeking work
                               week)
   ☐   ☐   ☐   ☐   ☐

4. What is your annual income amount?

   0-5k   6k-14k   15k-21k   22k-27k   27k+   Prefer not say
   ☐   ☐   ☐   ☐   ☐   ☐

Motives for travel

5. What is your primary reason for travelling to Morocco?

   family   leisure/holiday   business   holiday   Other
   ☐   ☐   ☐   ☐   ☐

6. In order from 1-5 (with 5 being the most important and 1 being the least important), what factor is the most important when deciding which airport to travel from and which airport to arrive at in Morocco)?

   Departure   Arrival   Proximity   Price   Who I
   airport   airport   to final   of   am
                         destination ticket   travelling

with

☐   ☐   ☐   ☐   ☐

Accommodation

7. In order from 1-5 (with 5 being the accommodation most used & 1 being accommodation least used) which accommodation did you use on average when you travelled to morocco in the last 12 months? (Insert 'nil' for accommodation NEVER used)?

Hotel/ hostel	Extended Family house	Parents/ Own house	Camping	other
☐	☐	☐	☐	☐

8. In order from 1-5 (with 5 being the accommodation most used & 1 being accommodation least used) which accommodation do you PROPOSE to use when you travel to morocco in the next 12 months? (Insert 'nil' for accommodation NEVER used)?

Hotel/ hostel	Extended Family house	Parents/ Own house	Camping	other
☐	☐	☐	☐	☐

Travel

9. How many times have you travelled to morocco in the past 3 years?

none	Once	twice	Three times	Four times	Five times+
☐	☐	☐	☐	☐	☐

10. How much did you pay on average for your return flight in the past 3 years?

Less than £100	£100-£150	£151-£225	£226-£300	£301+
☐	☐	☐	☐	☐

11. How many times do you plan to travel in the next 12 months to morocco if the average price you paid in the previous 3 years stayed the same?

none	Once	Twice	Three times	Four times	Five +
☐	☐		☐	☐	☐

12. If the price of the ticket to morocco was reduced to an average of £150 how many times would you travel in the next 12 months?

1-3	4-6	7-8	9-11	12+
☐	☐	☐	☐	☐

13. If the price of the ticket to morocco was reduced to an average of £100 how many times would you travel in the next 12 months?

     1-3   4-6   7-8   9-11   12+

□   □   □   □   □

14. If the price of the ticket to morocco was reduced to on average £50 how many times would you go in the next 12 months?

     1-3   4-6   7-8   9-11   12+

□   □   □   □   □

15. How long did you stay on average in morocco in the last 12 months?

  Weekend   3-5 days   1 week   Fortnight   4 weeks+

□   □   □   □   □

16. How long would you stay in morocco in the next 12 months on average?

  Weekend   3-5 days   1 week   Fortnight   4 weeks+

□   □   □   □   □

17. Assuming you travelled at least once in the last 12 months to Morocco, where did your main journey depart from?

  Heathrow   Gatwick   Luton   Stansted

□   □   □   □

Money Spending Habits

18. How much on average did you spend WEEKLY when you travelled to Morocco in the <u>last 12 months</u> (incl. money spent on others)?

£0-£50	£51-£100	£101-£149	£150-£199	£200-£399	£400-£699	£700-£999	£1,000+
□	□	□	□	□	□	□	□

19. Towards which element did you spend most of your money (order 1-5, with 5 being the most expenditure towards and 1 being the least)?

Accommodation	Food & Drink	Shopping & entertainment	Transport (excl. air ticket)	Other
□	□	□	□	□

20. How much on average are you budgeting to spend in the next 12 months in Morocco based on previous spending and if travel increases due to lower prices?

£0-£50	£51-£100	£101-£149	£150-£199	£200-£399	£400-£699	£700-£999	£1,000+
□	□	□	□	□	□	□	□

21. What do you propose to spend your money on in the next twelve months of travel to Morocco? (Order 1-5, with 5 being the most expenditure towards and 1 being the least)?

Accommodation	Food & Drink	Shopping & entertainment	Transport (excl. air ticket)	Other
☐	☐	☐	☐	☐

Outcomes

22. Please state to what extent you agree with the following statement; 'As a result of new lower-priced flights from London to Morocco…

		Strongly agree	**Agree**	**Neutral**	**Disagree**	**Strongly disagree**
a)	I now have better access to Morocco	○	○	○	○	○
b)	I now have improved contact with friends & relatives	○	○	○	○	○
c)	I am now more likely to holiday in Morocco	○	○	○	○	○
d)	I am now more likely to recommend Morocco as a holiday destination to my friends	○	○	○	○	○

THANKS FOR YOUR TIME

Appendix 7: Questionnaire Matrix

From the 50 questionnaires that were carried out, the summary results are displayed in the form of a matrix table.

Table: Matrix of Results

Question Number	Question Title	Possible responses	Number of respondents	Percentage of respondents (%)
1	*How old are you?*			
		18-20 years old	15	30
		21-23 years old	16	32
		24-26 years old	11	22
		27-29 years old	4	8
		30 years old	4	8
2	*What Gender are you?*			
		Male	21	42
		Female	29	58
3	*What is your current Socio-economic status?*			
		Working full-time	25	50
		Working part-time	3	6
		Unemployed & seeking work	3	6
		Student	19	38
4	*What is your annual income?*			
		£0-£5,000	14	28
		£6,000-£14,000	7	14
		£15,000-£21,000	5	10
		£22,000-£27,000	8	16
		£28,000 +	9	18
		prefer not say	7	14
5	*What is your primary reason for travelling to Morocco?*			
		Family	29	58
		Leisure/Holiday	15	30
		Business	1	2
		Other	5	10
6	*In order from 1-5 (with 5 being the most important and 1 being the least important), what factor is the most important when deciding which airport to travel from and which airport to arrive at in Morocco)?*			
	Departure Airport in UK			
		never considered	4	8
		not important at all	4	8
		unimportant	7	14

		neutral	10	20
		important	12	24
		very important	13	26
	Arrival Airport in Morocco			
		never considered	1	2
		not important at all	7	14
		unimportant	5	10
		neutral	5	10
		important	10	20
		very important	22	44
	Proximity of airport to final destination			
		never considered	1	2
		not important at all	4	8
		unimportant	2	4
		neutral	12	24
		important	16	32
		very important	15	30
	Price of return air-fare			
		never considered	3	6
		not important at all	4	8
		unimportant	4	8
		neutral	7	14
		important	7	14
		very important	25	50
	Whom I am travelling with?			
		never considered	7	14
		not important at all	13	26
		unimportant	11	22
		neutral	4	8
		important	8	16
		very important	7	14
7	In order from 1-5 (with 5 being the accommodation most used & 1 being accommodation least used) which accommodation did you use on average when you travelled to morocco in the last 12 months? (Insert 'nil' for accommodation NEVER used)?			
	Hotel	never even considered	24	48
		never used accommodation	7	14
		rarely used accommodation	4	8
		neutral	6	12
		used some of the time	4	8

		accommodation		
		used majority of the time accommodation	5	10
	Extended family house			
		never even considered	15	30
		never used accommodation	6	12
		rarely used accommodation	6	12
		neutral	3	6
		used some of the time accommodation	8	16
		used majority of the time accommodation	11	22
	Parents/ Own house			
		never even considered	5	10
		never used accommodation	3	6
		rarely used accommodation	1	2
		neutral	1	2
		used some of the time accommodation	4	8
		used majority of the time accommodation	36	72
	Camping			
		never even considered	36	72
		never used accommodation	5	10
		rarely used accommodation	2	4
		neutral	2	4
		used some of the time accommodation	2	4
		used majority of the time accommodation	3	6
	Other			
		never even considered	39	78
		never used accommodation	5	10
		rarely used accommodation	3	6
		neutral	3	6

		used some of the time accommodation		
		used majority of the time accommodation		
8	In order from 1-5 (with 5 being the accommodation most used & 1 being accommodation least used) which accommodation do you PROPOSE to use when you travel to morocco in the next 12 months? (insert 'nil' for accommodation NEVER used)			
	Hotel	never even considered		
		never used accommodation	22	44
		rarely used accommodation	3	6
		neutral	7	14
		used some of the time accommodation	8	16
		used majority of the time accommodation	10	20
	Extended family house			
		never even considered		
		never used accommodation	16	32
		rarely used accommodation	7	14
		neutral	2	4
		used some of the time accommodation	8	16
		used majority of the time accommodation	17	34
	Parents/ Own house			
		never even considered		
		never used accommodation	16	32
		rarely used accommodation	3	6
		neutral	2	4
		used some of the time accommodation	5	10
		used majority of the time accommodation	24	48

	Camping			
		never even considered		
		never used accommodation	38	76
		rarely used accommodation	4	8
		neutral	1	2
		used some of the time accommodation	2	4
		used majority of the time accommodation	5	10
	Other			
		never even considered		
		never used accommodation	43	86
		rarely used accommodation	3	6
		neutral	1	2
		used some of the time accommodation	2	4
		used majority of the time accommodation	1	2
9	How many times have you travelled to morocco in the past <u>3 years</u>?			
		once	16	32
		twice	12	24
		three times	11	22
		four times	4	8
		five times +	7	14
10	How much did you pay on average for your return flight ticket?			
		less than £100	2	4
		£100-£150	1	2
		£151-£225	5	10
		£226-£300	17	34
		£301-£349	16	32
		£350+	9	18
11	How many times do you plan to travel in the next 12 months to Morocco if the average price you paid in the previous 3 years stayed the same?			
		none	2	4
		once	36	72
		twice	7	14
		three times	2	4
		four times	1	2

		five times +	2	4
12	If the price was reduced to £150 how many times would you go in the nest 12 months?			
		1-3 times	41	82
		4-6 times	6	12
		7-8 times	1	2
		9-11 times	2	4
		12 times+	0	0
13	If the price was reduced to £100 how many times would you go in the nest 12 months?			
		1-3 times	29	58
		4-6 times	11	22
		7-8 times	4	8
		9-11 times	4	8
		12 times +	2	4
14	If the price was reduced to £50 how many times would you go in the nest 12 months?			
		1-3 times	11	22
		4-6 times	17	34
		7-8 times	8	16
		9-11 times	6	12
		12 times +	8	16
15	How long did you stay on average in Morocco in the last 12 months?			
		weekend	2	4
		3-5 days	4	8
		1 week	3	6
		fortnight	21	42
		4 weeks +	19	38
		Total	49	98
16	How long would you stay in the next 12 months on average?			
		weekend	3	6
		3-5 days	0	0
		1 week	5	10
		fortnight	15	30
		4 weeks +	27	54
17	Assuming you travelled at least once in the last 12 months to Morocco, where did your main journey depart from?			
		Heathrow	38	76
		Gatwick	3	6
		Luton	2	4
		Stansted	6	12
18	How much on average did you spend WEEKLY when you travelled to Morocco in the last 12 months (incl. money spent on others?			
		£0-£50	7	14

		£51-£100	5	10
		£101-£149	10	20
		£150-£199	7	14
		£200-£399	9	18
		£400-£699	5	10
		£700-£999	2	4
		£1,000+	4	8
19	what did you spend your money on (order 1-5, with 5 being the most expenditure towards and 1 being the least)			
	Accommodation			
		least expenditure towards	26	52
		little expenditure towards	9	18
		neutral	3	6
		expenditure towards	6	12
		most expenditure towards	2	4
	Food & Drink			
		least expenditure towards	4	8
		little expenditure towards	7	14
		neutral	10	20
		expenditure towards	9	18
		most expenditure towards	18	36
	Shopping & entertainment			
		least expenditure towards	5	10
		little expenditure towards	1	2
		neutral	12	24
		expenditure towards	8	16
		most expenditure towards	23	46
	Transport			
		least expenditure towards	7	14
		little expenditure towards	6	12
		neutral	10	20
		expenditure towards	12	24
		most expenditure towards	13	26
	Other			
		least expenditure	39	78

		towards		
		little expenditure towards	2	4
		neutral	2	4
		expenditure towards	1	2
		most expenditure towards	5	10
20	How much on average are you budgeting to spend in the next 12 months in Morocco based on previous spending and if travel increases due to lower prices?			
		£0-£50	7	14
		£51-£100	5	10
		£101-£149	6	12
		£150-£199	17	34
		£200-£399	5	10
		£400-£699	5	10
		£700-£999	1	2
		£1,000+	4	8
21	What do you propose to spend your money on in the next twelve months of travel to Morocco? (order 1-5, with 5 being the most expenditure towards and 1 being the least)			
	Accommodation			
		least expenditure towards	28	56
		little expenditure towards	8	16
		neutral	5	10
		expenditure towards	4	8
		most expenditure towards	3	6
	Food & Drink			
		least expenditure towards	4	8
		little expenditure towards	9	18
		neutral	6	12
		expenditure towards	9	18
		most expenditure towards	22	44
	Shopping & Entertainment			
		least expenditure towards	4	8
		little expenditure towards	4	8
		neutral	14	28
		expenditure	9	18

		towards		
		most expenditure towards	19	38
	Transport			
		least expenditure towards	10	20
		little expenditure towards	10	20
		neutral	8	16
		expenditure towards	9	18
		most expenditure towards	13	26
	Other			
		least expenditure towards	37	74
		little expenditure towards	1	2
		neutral	1	2
		expenditure towards	10	20
		most expenditure towards	1	2
22	Please state to what extent you agree with the following statement; 'As a result of new lower-priced flights from London to Morocco			
	I now have better access to Morocco			
		strongly agree	24	48
		agree	12	24
		neutral	12	24
		disagree	2	4
	I now have improved contact with family in Morocco			
		strongly agree	15	30
		agree	14	28
		neutral	16	32
		disagree	5	10
	I am now more likely to holiday in Morocco			
		strongly agree	24	48
		agree	13	26
		neutral	8	16
		disagree	5	10
	I am now more likely to recommend Morocco to my friends			
		strongly agree	25	50
		agree	15	30
		neutral	7	14
		disagree	2	4
		strongly disagree	1	2

Appendix 8: Moroccan data statistics

Morocco Data Profile			
Click on the indicator to view a definition	**2000**	**2004**	**2005**
People			
Population, total	27.8 million	29.8 million	30.2 million
Population growth (annual %)	1.1	3.4	1.1
Poverty headcount ratio at national poverty line (% of population)	..	..	..
Life expectancy at birth, total (years)	68.8	70.1	..
Fertility rate, total (births per woman)	2.6	2.5	..
Mortality rate, infant (per 1,000 live births)	45.0	38.2	..
School enrollment, primary (% gross)	93.2	105.9	..
School enrollment, secondary (% gross)	38.7	47.6	..
School enrollment, tertiary (% gross)	9.0	10.6	..
Ratio of girls to boys in primary and secondary education (%)	83.0	88.0	..
Literacy rate, adult total (% of people ages 15 and above)	..	52.3	..
Environment			
Surface area (sq. km)	446.6 thousand	446.6 thousand	446.6 thousand
Forest area (sq. km)	43,280.0	..	43,640.0
Agricultural land (% of land area)	68.7	..	..
Economy			
GNI, Atlas method (current US$)	34.0 billion	46.9 billion	52.3 billion
GNI per capita, Atlas method (current US$)	1,220.0	1,570.0	1,730.0
GDP (current US$)	33.3 billion	50.0 billion	51.7 billion
GDP growth (annual %)	1.0	4.2	1.6
Inflation, GDP deflator (annual %)	1.5	1.5	1.8
Global links			
Official development assistance and official aid (current US$)	419.3 million	705.9 million	..
Workers' remittances and compensation of employees, received (US$)	2.2 billion	4.2 billion	..
Source: *World Development Indicators database*, April 2006			

Adapted from
*http://devdata.worldbank.org/external/CPProfile.asp?SelectedCountry=MAR&CCODE=MAR&CNA
ME=Morocco&PTYPE=CP*

Appendix 9: Content Analysis of Semi-structured interviews

	Interviewee 1	Interviewee 2	Interviewee 3	Total
Strategic location of Morocco	√	√		2
Synergies between economic factors (such as GDP, unemployment and remittance)	√	√	√	3
Employment creation	√		√	2
Resort creation	√	√		2
Deregulation of the airline industry	√	√	√	3
Remittance receipts	√		√	2
Property development (both apartments and hotels)	√	√	√	3
Increase of seat capacity to regional airports and tourist locations	√			1
Respect of culture		√		1
Sustainability of tourism product	√	√	√	3
Banking incentives		√		1
British tourism development	√	√	√	3
2nd generation Moroccan Diaspora	√	√	√	3
Mass tourism direction	√	√	√	3

Appendix 10: Regression analysis

Table 4.11.2   Regression table: ANOVA testing

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	43.627	3	14.542	9.277	.000(a)
	Residual	103.459	66	1.568		
	Total	147.086	69			

a Predictors: (Constant), ifpricereducedto£50, ifpricedreducedto£150, ifpricereducedto£100
b Dependent Variable: proposedtravel12months

Table 4.11.3   Regression table: Coefficients (a)

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	.423	.375		1.129	.263
	ifpricedreducedto£150	.154	.285	.098	.539	.592
	ifpricereducedto£100	.077	.304	.069	.253	.801
	ifpricereducedto£50	.414	.199	.417	2.084	.041

A Dependent Variable: proposedtravel12months

The regression model suggests that frequency is dependent on the price of the return air-ticket. However, Table 4.11.2, the ANOVA statistical testing side of the regression model indicates that the model could only forecast a third of the correlation between prices of return air-fare alongside the frequency figure.

Appendix 11: Dissertation Diary

	Start	End
Proposal	November 2006	December 2006
Dissertation Construction		
Introduction	*December '06*	*March '07*
Literature Review	*December '06*	*April '07*
Methodology	*January '07*	*April '07*
Findings, Analysis & Discussion	*February '07*	*April '07*
Conclusion	*March '07*	*April '07*
Research (Primary Research)		
Interview 1 (location: Morocco, Tangiers)	*February 26th 2007 (duration 1hr)*	
Interview 2 (location: UK, London)	*March 13th 2007 (duration 1hr)*	
Interview 3 (location: UK, London)	*March 15th 2007 (duration 40min)*	
Questionnaires	*February '07*	*March '07*
Research (Secondary Research)		
Journal search (via Brunel library)	*November '06*	*April '07*
Non-academic sources	*November '06*	*April '07*
Moroccan Tourism Ministry Statistics	*January '07*	*April '07*
Key Events		
Responsible Tourism Conference	*April 12th 2007 (one day conference)*	
Drafts		
First draft		*March 29th 2007*
Second draft		*April 11th 2007*
Third draft		*April 17th 2007*