Observatoire Régional de Veille Stratégique et d'Intelligence Territoriale de Tanger–Tétouan–Al Hoceïma

RÉGION TANGER - TÉTOUAN - AL HOCEÏMA

Monitoring Bulletin

NEWS

N°7

July 2025

Tourism in TTA: Towards an International Repositioning

Executive Summary

Summer 2025 confirms the strong tourism traction of the Tangier–Tetouan–Al Hoceima region: MRE arrivals rose by +10.37% as of early August, with Tangier Med consolidated as the main entry point (35.87% of flows). The TTA CRT offer combines cultural tours, upgraded beaches, and medina events, asserting a positioning that blends quality with accessibility.

In terms of accessibility, the strengthening of Al Boraq frequencies (6 a.m.–10 p.m.) and the extension project at Tanger Ibn Battouta Airport towards a capacity of 7 million passengers by 2028 improve the price/time ratio, crucial for short stays and business/event tourism.

Internationally, the recognition of the Moroccan destination by Welcome Travel Group (Italy) and the targeted Wego digital campaign (Gulf) open opportunities to convert into off-season sales, via packaged offers and performance-based contracts with clear KPIs.

Impact Plus

1. Context and Stakes

The Tangier–Tetouan–Al Hoceïma (TTA) region enters summer 2025 in a context confirmed by the most recent data. By August 4, 2025, the Kingdom had welcomed 2,789,197 MREs (+10.37% vs 2024). Tangier Med accounted for 35.87% of port/land arrivals (555,753 people, 175,808 vehicles), consolidating its role as the main entry point for MRE flows to the north. These dynamics directly support coastal activity (accommodation, food services, leisure, crafts) and strengthen TTA's position on the national tourism map.
On mobility, ONCF deploys a summer plan built around Al Boraq with hourly service 6 a.m.–10 p.m., reinforced Intercités (up to 70/day), and continued night trains on the Tangier–Oujda line, improving the price/time ratio for short stays and business/event clientele. In parallel, Tangier Ibn Battouta Airport is entering its expansion phase (~MAD 1.9 bn) to raise capacity to ~7 million passengers by 2028, a key milestone for opening targeted non-summer routes.
On quality/sustainability, the Blue Flag 2025 edition strengthens the coastal upgrade: 33 labeled sites nationwide, including in TTA the beaches of M'diq, Achakar, Dalia, Rifienne, Ba Kacem, and Tanja Marina Bay for marinas. This label, driven by the Mohammed VI Foundation for Environmental Protection, aligns the destination with Mediterranean standards expected by international and domestic markets.
Market diversification is intensifying: recognition of Morocco by Welcome Travel Group (Italy) and ONMT × Wego digital campaign in the Gulf/MENA, focusing on city breaks, nature, and premium stays. Goal: convert visibility into off-season sales via co-marketing performance contracts (integrated KPIs) and 3–4-night packages (Tangier–Chefchaouen–Tamuda Bay).
Response to Regional Council remarks: seasonality, structuring projects, domestic market. TTA remains marked by high seasonality (July–August peaks); the legacy of major events (AFCON 2025, World Cup 2030) is a lever to combine with transport/hospitality investments to enhance international appeal. The still-under-captured domestic market will be worked through "Train + Stay + Experience" offers (September–May window) and an early-bird policy aligned with rail frequencies. These axes are integrated into the roadmap (R1–R5) and will be developed into "4-seasons" products.
For priority issues raised by the Regional Council, the region must address: (i) road congestion toward beach resorts (rail/intercity shuttle complementarity to be developed), (ii) price/quality tension at peak times (monitoring via ADR/RevPAR/NPS observatory and voluntary price-moderation charters), (iii) coastal waste management (operational anchoring to Blue Flag label), and (iv) skill gaps in hospitality trades (micro-certifications, e-distribution, languages). These points are addressed in operational sections and associated public-private governance.

2. Summer Season 2025: Attendance and Occupancy

In summer 2025, the Kingdom's flagship destinations – Tangier, -Martil, M'diq, Al Hoceïma, Agadir, and Marrakech – recorded an average hotel occupancy rate estimated at 80%, according to statements from several Regional Tourism Council presidents relayed by the specialized press. This level, at the upper end of performance observed over the past five years, reflects a combination of strong inflows of Moroccans living abroad (MREs), a dynamic domestic clientele, and the direct impact of promotional actions led by the TTA CRT in target markets.
In the TTA region, this performance is further supported by proximity to Europe, the concentration of Blue Flag beach resorts, and the international renown of emblematic cities such as Chefchaouen, Tangier, and Assilah.
The 2025 Marhaba Operation confirms this dynamism. By August 4, 2025, the Kingdom had welcomed 2,789,197 MREs across all entry points, an increase of 10.37% compared to the same period in 2024. Tangier Med consolidates its role as a strategic hub, accounting for 35.87% of port/land arrivals, representing 555,753 people and 175,808 vehicles. The impact on TTA's coastal areas is direct: demand for accommodation, food services, and leisure rises significantly in zones such as Tangier, , M'diq-

Fnideq, and Al Hoceïma, generating positive spillovers for related markets, notably crafts, tourist transport, and local product consumption.
Summer 2025 thus appears as a season of recovery and consolidation, marked by stabilization after post-pandemic adjustments and the fluctuations of 2023–2024. The performance of Tangier Med, combined with a dense cultural program of festivals, sports events, and exhibitions, should enable TTA to sustain high occupancy rates through mid-September. However, the strong concentration of arrivals over just a few weeks highlights the need to extend the season through events scheduled outside the summer period and thematic offers capable of stimulating year-round demand.

3. CRT Products and Initiatives – Summer 2025

The region's seaside offer for summer 2025 is structured around the dual axis of "quality and accessibility." Beaches benefited from a redevelopment and modernization program aimed at improving visitor facilities, notably through shaded areas, sanitary blocks, and public showers. Accessibility for people with reduced mobility has been strengthened, while multilingual signage has been introduced to enhance visitor comfort.
In parallel, cultural and heritage events have been staged in the historic medinas of Tangier, , and Chefchaouen. New cultural circuits link to M'diq, combining guided tours, gastronomic experiences, and encounters with local artisans. The offer is further enriched with complementary attractions such as water activities – diving, kayaking, sailing – and summer sports competitions designed to appeal to both family and international audiences. The strategic objective is clear: to increase average visitor spending by stimulating out-of-accommodation consumption, particularly in crafts, dining, and leisure.
The summer hosting programs are based on close coordination between the TTA Regional Tourism Council (CRT), coastal municipalities, and private operators. Actions include the deployment of specialized teams to ensure cleanliness and maintenance of beaches and public areas, reinforcement of lifeguard stations with trained rescuers, mobile health coverage and prevention systems, as well as the introduction of tourism mediation agents tasked with guiding and assisting visitors, particularly MREs and foreign tourists.
These measures are applied primarily on Tangier's urban beaches and Corniche, the high-end resorts and family beaches of Tamuda Bay, as well as the highly frequented Blue Flag coves and beaches of Al Hoceïma.

4. Nature, Sustainability, and Labels

The Blue Flag 2025 emerges as a major indicator of environmental quality and sustainable management of coastal and port areas. At the national level, Morocco now counts 33 certified sites, including 28 beaches meeting international standards for environmental management, bathing water quality, safety, and environmental education; four marinas certified for best practices in waste management, yachting services, and preservation of marine ecosystems; as well as one lake site integrated for the first time into the network, marking the extension of certification beyond the coastline.
In the Tangier—Al Hoceïma region, several beaches were recognized in 2025, among them M'diq, Achakar, Dalia, Rifienne, and Ba Kacem. On the port side, Tanja Marina Bay International joined the network of Blue Flag-certified marinas, confirming its status as a benchmark marina in the Mediterranean basin and its compliance with sustainability requirements.
The strategic impact of this recognition is multifaceted. It sends a strong signal in favor of the destination's sustainable positioning, aligned with national and international objectives for responsible tourism. It also contributes to upgrading coastal standards, with the Blue Flag serving as a lever of competitiveness against other Mediterranean destinations, strengthening the confidence of both foreign and domestic visitors in the quality of beaches and services. Finally, this distinction represents

an opportunity to enhance the tourism offer around nature and ecotourism themes, by integrating the label into promotional campaigns of the Regional Tourism Council and partner offices.

5. Access and Mobility – Drivers of Competitiveness

Rail strengthening is one of the pillars of the Special Summer 2025 Plan implemented by the National Railways Office (ONCF). On the Tangier – Kenitra – Rabat – Casablanca axis, the Al Boraq high-speed train now runs hourly from 6:00 a.m. to 10:00 p.m., with increased capacity to absorb strong summer demand. This optimization reduces waiting times and offers smoother travel for short stays, long weekends, and business trips. In parallel, the Intercity network reaches up to 70 daily connections, ensuring enhanced links to the South and East of the Kingdom, while night trains on the Tangier–Oujda axis are maintained and optimized, facilitating long-distance travel and maximizing time spent at the destination. These developments directly improve accessibility for city breaks, event tourism (MICE), and short stays, while diversifying visitor profiles.

On the maritime front, Tangier Med Passengers confirms its role as a strategic hub. In 2024, the port welcomed 3.05 million passengers, up 13% compared to 2023, thanks to post-pandemic recovery, competitive pricing, and reliable connections. The positive trend continues in 2025, driven by Marhaba Operation flows, with records set as early as August, notably more than 555,000 passengers in a single month through Tangier Med. This performance boosts attractiveness among MRE and European markets, consolidating the port's position as the Kingdom's main maritime gateway.

In the air sector, Tangier Ibn Battouta Airport is undergoing a strategic modernization and extension phase, backed by a budget envelope estimated at MAD 1.9 billion. The goal is to increase annual capacity to about 7 million passengers by 2028. Works have entered an active phase with the awarding of the first packages, and the expansion is designed to support sustained growth in international traffic, particularly in the MRE, Gulf, and Southern Europe segments.

The combined effect of these investments in rail, maritime, and air sectors positions the Tangier—Al Hoceïma region as one of the best-connected territories in Morocco. The simultaneous improvement of the three transport modes enhances attractiveness for high-value international markets, smooths tourist flows during seasonal peaks, and opens the way to reducing seasonality of demand thanks to optimized connectivity year-round.

6. Target Markets: MREs, Italy, Gulf/MENA

The market of Moroccans living abroad (MREs) represents a structural seasonal accelerator for the Tangier—Al Hoceïma region. A strategic driver of the summer high season, MREs are an essential engine of regional tourism, with a significant share of their flows transiting through the port of Tangier Med. This concentration strengthens the direct impact on the coastline and nearby inland areas. Diversification opportunities are numerous: developing offers that combine family, seaside, and nature tourism to capture additional spending beyond accommodation, and designing targeted packages to extend demand into September and October, historically weaker months. This segment also maintains a strong strategic link with local crafts, regional gastronomy, and cultural circuits, thereby consolidating local economic benefits.

The Italian market, for its part, benefits from a high-visibility partnership. In April 2025, Morocco was designated "Best Partner Tourist Destination" by Welcome Travel Group (WTG) at its annual convention in Casablanca. This international recognition offers the TTA Regional Tourism Council (CRT) the opportunity to launch targeted co-marketing operations, highlighting city breaks in Tangier and Chefchaouen as well as cultural and nature circuits featuring heritage sites and ecotourism experiences. Geographic proximity and the existence of direct air and maritime connections with northern Italy further strengthen attractiveness. The region's premium positioning fully matches the expectations of an Italian audience seeking authenticity and comfort.

The Gulf/MENA market also constitutes a strategic development axis, particularly through the ONMT

× Wego joint campaign launched in June 2025. This initiative targets travelers from the Middle East and North Africa by leveraging a leading booking and travel inspiration platform. The program includes the distribution of digital content, guides, influencer campaigns, and packaged offers. Flagship products promoted include Chefchaouen as an iconic destination, the northern coastline with its resorts and Blue Flag beaches, as well as nature getaways and authentic experiences in mountain and rural areas. The objective is to capture a high-spending clientele sensitive to premium stays and exclusive experiences, thereby diversifying visitor sources and increasing the regional tourism value added.

7. Structural Barriers to Monitor

Tourist activity on the northern coastline remains heavily concentrated in July and August, generating saturation peaks followed by significant underutilization of infrastructure and accommodation in autumn and winter. This high seasonality constitutes a major strategic challenge for the Tangier—Al Hoceïma region. The development of "4-season" products appears as a necessary response to smooth demand throughout the year. Proposed solutions include organizing cultural and sports events off-season, creating wellness offers, promoting business tourism (MICE), and developing nature and heritage circuits. Such a strategy would improve infrastructure profitability, extend seasonal employment, and stabilize the revenues of local operators.

Airport capacity is another area requiring attention. In 2024, Tangier Ibn Battouta Airport handled around 2.4 million passengers for a nominal capacity of 2 million, i.e. an occupancy rate above 120%. The ongoing extension project, aimed at reaching nearly 7 million passengers annually by 2028, is strategic to absorb this growth. However, its effects will only be felt after the summer 2025 peak season, raising concerns about continued strain on incoming flows during seasonal peaks and a potential impact on the traveler experience.

Finally, strong summer inflows place considerable pressure on beaches, road networks, and urban infrastructure. This overload increases the risk of declining service quality in terms of cleanliness, safety, and fluidity, which may lead to visitor dissatisfaction and harm the region's image. To address this, it is recommended to implement standardized inter-municipal norms for beach management, urban maintenance, and safety. This could involve pooling rescue services, strengthening logistical coordination, and adopting unified maintenance and hosting standards.

8. Off-Season Diversification Levers

The Tangier—Al Hoceïma region holds multiple assets enabling the extension of tourism activity beyond the summer high season. The development of ecotourism and mountain tourism ranks among the priorities. In Talassemtane National Park (Chefchaouen), the creation of hiking routes with accommodation in mountain lodges and guided activities, coupled with the promotion of goat-based local products, constitutes a structuring lever. Extending the Goat Fair beyond late June to cover September and October would broaden the season, highlight terroir products, and enhance the upgrading of the nature offer.

The cultural and heritage dimension represents a second major axis. Off-season programming of events in the medinas of Tangier and —concerts, street theater, craft workshops—could be complemented by the creation of thematic circuits. These could include a trail on Tangier modernism (architecture and design), an itinerary dedicated to the Beat Generation and the writers of the 1950s–1960s, as well as a circuit on Jewish-Moroccan heritage with guided tours and cultural events. These initiatives aim to attract a cultured and international audience outside summer and to consolidate the region's cultural identity.

Nautical activities and cruising also represent promising avenues. With the recent Blue Flag certification of Tanja Marina Bay, the region could host nautical rallies, regional races, and position itself as a wintering base for yachting by accommodating boats for several months. The reception of

repositioning cruises in spring and autumn would strengthen port activity and support nautical businesses and service providers year-round.
The MICE segment (Meetings, Incentives, Conferences, Exhibitions) and sports also offer significant potential. Thanks to rapid Al Boraq service, its high-standard hotels, and sports facilities, the region can host business events, sports competitions, and seminars. Organizing trail runs in the Rif, surfing competitions, and golf tournaments in autumn or winter, combined with "event + accommodation + transport" packages, would increase off-season overnight stays and diversify clientele.
Finally, a co-marketing strategy targeting Italian and Gulf/MENA markets could complement this effort toward reducing seasonality. Packages of 3–4 nights combining "city break + nature" in Tangier, Chefchaouen, and Tamuda Bay could be promoted through partnerships with Welcome Travel Group (WTG) for Italy and Wego for the Gulf/MENA. The quantified objective would be to achieve an occupancy rate of at least 55% between November and March, thereby reducing dependence on the high season and strengthening presence in high-spending markets.

9. Priority Watchpoints (2025–2026)

To strengthen the tourism competitiveness of the Tangier—Al Hoceïma region and reduce dependence on the summer season, five strategic recommendations are proposed.

R1 – "4-Season" Offers

The creation of a "TTA Off-Season Collection," adapted for autumn, winter, and spring, would structure an attractive year-round tourism offer. This range would include signature experiences such as guided meditations in the Rif, immersive craft workshops, and gastronomic routes around local products (goat-based goods, olive oil, citrus fruits). The introduction of smart pricing through seasonal yield management would optimize off-summer occupancy rates. Expected impacts include lengthening the tourism season, improving return rates, and strengthening customer loyalty.

R2 – International Visibility Contracts

Strengthening the region's presence in foreign markets would involve concluding co-marketing contracts with key partners such as Welcome Travel Group (Italy) and Wego (Gulf/MENA). These agreements would incorporate quantified sales objectives, an annual editorial calendar for digital and press campaigns, and measurable performance indicators. Expected outcomes include greater international awareness and increased targeted bookings in premium segments.

R3 – Mobility and City Breaks

Synchronizing CRT promotions with Al Boraq's reinforced hourly frequencies (6 a.m.–10 p.m.) and Intercity trains would serve as a lever to boost domestic tourism. "Train + Stay + Experience" packages tailored to long weekends, along with hotel-train formulas for MICE events or 2–3-day getaways, could be developed. This approach aims to stimulate demand for short, high-value stays.

R4 – Labels & Perceived Quality

The internationally recognized Blue Flag label should be leveraged as a central marketing tool to establish the destination's image of quality and sustainability. Installing QR codes on beaches and stations, linking to multilingual descriptive sheets, would facilitate reliable information sharing. In parallel, the labeling logic could be extended to "green itineraries" integrating eco-lodging, waste-sorting sites, and sustainable water management systems. These actions would strengthen the region's environmental credibility.

R5 – Targeted Air Strategy

In anticipation of Tangier Ibn Battouta Airport's expansion to a capacity of 7 million passengers by 2028, a targeted route plan should be designed. This would include developing connections with Italy (Milan, Bergamo, Turin) and the Gulf (Riyadh, Dubai, Doha). Incentives such as winter-route bonuses and co-marketing programs with airlines would open the region to new customer segments and reduce dependence on the high season.

R6 – Develop an integrated public-private strategy to sustainably capture tourism flows, building on upcoming major sports events.

R7 – Deploy targeted digital marketing campaigns to improve TTA's positioning in international markets.

R8 – Establish tariff regulation and quality control mechanisms to limit the negative effects of seasonality.

R9 – Further integrate the environmental dimension (coastal management, sustainable tourism) to reinforce the image of a responsible and competitive region.

Key Sources

Assahifa. (August 2025). *Provisional report on Operation Marhaba 2025.* https://fr.assahifa.com

Atalayar. (July 2025). *Tangier modernizes its airport to welcome more passengers.* https://atalayar.com

Barlaman Today. (August 2025). *MRE arrivals: increase of 10.37% compared to 2024.* https://www.barlaman.today

Bladi.net. (July 2025). *Tangier Ibn Battouta: launch of the expansion.* https://www.bladi.net

Mohammed VI Foundation for Environmental Protection. (July 2025). *Press release – Blue Flag 2025.* https://www.fm6e.org

Foundation for Environmental Education. (2025). *Blue Flag – Awarded Sites 2025.* https://www.blueflag.global

Hespress. (July 2025). *Blue Flag: international recognition of Moroccan beaches.* https://www.hespress.com

Infomédiaire. (June 2025). *Summer mobility: ONCF strengthens its services.* https://infomediaire.net

Le Matin. (July 2025). *Blue Flag 2025: Morocco aligns 33 sites.* https://lematin.ma

LesEco.ma. (June 2025). *ONCF: special plan for summer 2025.* https://leseco.ma

Maroc.ma. (April 2025). *Morocco recognized by Welcome Travel Group.* https://www.maroc.ma

Médias24. (April 2025). *Tourism: Morocco named best partner destination by WTG.* https://medias24.com

Médias24. (July 2025). *Sustainable tourism: Morocco's Blue Flag beaches in 2025.* https://medias24.com

Morocco World News. (June 2025). *ONMT and Wego launch campaign to attract Gulf travelers.* https://www.moroccoworldnews.com

National Railways Office (ONCF). (June 2025). *Special summer 2025 plan: reinforced schedules and new services.* https://www.oncf.ma

National Airports Office (ONDA). (July 2025). *Tangier Ibn Battouta Airport expansion: capacity raised to 7 million passengers.* https://www.onda.ma

Moroccan National Tourism Office (ONMT). (April 2025). *Morocco, best partner tourist destination 2025.*

Tangier Med Port Authority. (2024). *Annual press release – 2024 passenger and freight traffic statistics.* https://www.tmpa.ma

Wego. (June 2025). *Press release – Morocco Tourism Board and Wego join forces.* https://company.wego.com

Yabiladi. (August 2025). *Operation Marhaba 2025: More than 2.78 million MREs welcomed by August 4.* https://www.yabiladi.com

Annex: Economic Benchmarks (Tangier—Al Hoceïma Region)

- **Share of "tourism" in regional GDP (proxy Hotels & Restaurants, 2023):** ≈ 3.7% of regional GDP (MAD 5,741 bn out of MAD 156,251 bn; current prices). *Baseline reading of tourism weight: the "Hotels & Restaurants" branch does not cover the entire tourism ecosystem (transport, trade, leisure, etc.).*
- **Jobs linked**
    - *Direct (order of magnitude):* ≈ 53,000 jobs. *Method: distribution of the national estimate of direct tourism jobs (~ 550,000) prorated by TTA's share of EHTC overnight stays (≈ 9.73% in 2022). (CESE)*
    - *Direct + indirect (indicative range):* ≈ 80–95,000 jobs (applying a cautious multiplier of 1.5–1.8, to be documented during a statistical update). *(Estimate, not official data).*
- **Share of overnight stays (EHTC, 2022):** Domestic: ~ 53% / International: ~ 47% (TTA ≈ 1.85 m overnight stays; 976.9k residents vs 872.3k non-residents).
- **Regional tourism revenues – order of magnitude estimate**
    - *2024:* ≈ MAD 10.9 bn (allocation key = TTA share of 2022 EHTC overnight stays, applied to the MAD 112.5 bn of national "travel" receipts). *(mapbusiness.ma, Challenge)*
    - *2023:* ≈ MAD 10.2 bn (same allocation key applied to the MAD 104.6 bn national total). *(Scribd)*
- **Top 5 markets (including domestic) (latest detailed year available, EHTC 2022 – "region" aggregation by main TTA destinations):** Domestic, France, Spain, Netherlands, Belgium. *By destination: in Tangier, France > Spain > Netherlands/USA > Belgium; in Chefchaouen, France/Spain with a notable US share; in Al Hoceïma, strong Dutch and Belgian presence.*
- **Seasonality profile (EHTC 2022):** peak July–August, trough November–March. *Examples: share of July–August overnight stays in the year — Tangier ~ 32%, M'diq Fnideq ~ 36%, Tetouan ~ 37%, Al Hoceïma ~ 57%, Chefchaouen ~ 26%.*