

Tourism expansion strategy in Algeria between the Tourism Development Master Plan 2030 and the reality of achievements

Bourayou Hadjer Amira¹, Mesmous Radhwane^{2*}

¹ University of Blida 2 Ali Lounici (Algeria)

eh.bourayou@univ-blida2.dz

² University of Blida 2 Ali Lounici (Algeria)

r.mesmous@univ-blida2.dz

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Abstract: This paper aims to examine the current state of achievements and ongoing projects within Algeria's tourism sector by analyzing the number of hotel establishments and inbound tourists, and comparing these indicators with the objectives set out in the Tourism Development Master Plan -Horizon 2030.

Based on statistical data available up to 2023, the study identifies several administrative and financial obstacles that have hindered the completion of a significant number of projects and delayed the initiation of others. These challenges have contributed to a noticeable gap between the actual capacity of the tourism infrastructure –particularly in terms of available beds- and the strategic goal outlined in the national plan, as well as the actual number of tourists visiting the country.

In order to prepare this study and answer the various questions, the descriptive-analytical method was adopted, which is appropriate to the nature of the subject and which enables us to reach the stated objectives.

The paper concludes by emphasizing the need for more serious engagement with tourism development initiatives through enhanced administrative and financial facilitation, along with effective monitoring mechanisms to ensure timely and successful project implementation.

Keywords: Tourism, Tourism development plan 2030, Algeria.

Jel Classification Codes : Z32-Z39

* Corresponding author.

Introduction:

Tourism is a leisure activity that goes beyond the daily routine of the tourist. It contributes significantly to the economic growth of most countries by providing financial resources in foreign currency and improving the balance of payments, while also representing an important industry grounded in scientific and cultural foundations. Given its importance as a key driver of attraction, Algeria seeks to develop its tourism sector, as it possesses remarkable potential. This potential stems from its great diversity of natural factors, including a 1,600 km coastline with many beaches and scenic landscapes, forests, plains, plateaus, and mountains. Additionally, the vast Sahara Desert, covering over two million square kilometers, is considered one of the most beautiful deserts in the world.

Despite these natural and historical assets, Algeria's tourism development efforts remain modest compared to its potential. This study therefore aims to assess the progress of tourism development and planning strategies in Algeria by addressing the following research question:

To what extent have the achievements outlined in Algeria's tourism development plans been realized?.

The study employs a descriptive and analytical approach covering the period 2018–2023 to evaluate the actual situation compared with the targets set out in the National Tourism Development Plan - Horizon 2030.

I- The Nature and Importance of Tourism:

I.1. The Nature of Tourism:

I.1.1. Definition of Tourism:

The concept of tourism has been defined in different ways depending on the perspective adopted. The first known definition was provided by the German scholar Guyber Froehler in 1905, who described it as: “A phenomenon that arises from the growing need to change one’s environment, stay in regions with particular characteristics, while also strengthening contacts among peoples, which has contributed to the expansion of trade and industry as a result of advances in transportation”. (El-Jallad, 1988, p. 108)

Another widely accepted definition was given by Professor Hunz Kinse, President of the International Association of Tourism Experts, who defined it as: “The set of relations that arise from the travel and temporary stay of a foreign individual in a place, as long as this stay does not turn into permanent residence and is not linked to profit-generating activities”. (Boufleih & Tegrouret, 11-12 May 2010)

In general, scholars differ in their perspectives: some consider tourism as a recreational activity enabling cultural exchange, while others define it as an economic phenomenon with strong impacts on trade, international relations, and investment. In Islamic tradition, tourism is also considered as travel for knowledge, trade, or spiritual purposes. (Boulassas & Saihi, June 2025, p. 720)

From these definitions, it can be concluded that tourism represents an economic, social, and cultural activity, as well as a channel for human interaction and communication.

I.1.2. Importance of Tourism:

Tourism is a multidimensional sector with importance in several fields: (Metlef, 11-12 May 2010)

- **Economic importance:** Tourism significantly boosts economic output, acting as a primary driver of development and a key source of foreign currency inflows.

- **Cultural importance:** Tourism facilitates the exchange of cultures and civilizations across nations, playing an important role in societal development.

- **Political importance:** Tourism serves as a tool for interaction among nations, strengthening international relations.

I. 2. Characteristics of Tourism:

Tourism has a number of distinctive characteristics: (Smaini, 2014, p. 21)

- The components of tourism activity are diverse and interconnected with other economic activities.

- The suitability of the comprehensive concept of the tourism climate constitutes an influential factor in the demand for tourism products both locally and internationally.

- Tourism demand does not rely solely on the availability of resources, the diversity of attractions, services, and facilities, but is also shaped by other factors such as the prices of essential and complementary tourism services.

- Tourism demand largely depends on the financial capacity of the tourist, since it often reflects a desire to satisfy luxury needs rather than essential ones.

- It is influenced by the level of economic prosperity in the country, by technological advancements in transportation and communication, and by economic fluctuations, in addition to cultural and political factors over which governments have limited control.

- Tourism serves as a driver of cultural and social creativity and as a field for the application of advanced technology, which requires higher levels of efficiency and qualification in the face of international competition.

- It also represents an effective instrument of public policy in creating social integration at both the national and international levels, while serving as a means to foster the development of other industries

and to promote a form of international harmony—particularly among neighboring countries and more broadly on a global scale.

II– Algeria’s Tourism Potential and Barriers to Exploitation:

II.1. Obstacles to Algerian Tourism:

Despite its rich natural and cultural heritage, Algeria’s tourism sector faces a number of challenges, including: (challali & Aouinan, 11-12 May 2010)

- The absence of a unified vision for Algerian tourism products;
- The weakness in the quality of the tourism product:
 - * Poor quality of tourism services;
 - * Very weak and low-standard accommodation and hotel services;
 - * Low quality of transportation.
- The poor performance of travel agencies and the lack of training and qualification of personnel;
- Limited integration of information and communication technologies within the tourism sector;
- Financial services, management, and organization that are not adapted to the tourism industry:
 - * Banking and financial services incompatible with tourism needs;
 - * Management and organizational practices that are not suited to modern tourism.
- Lack of security, along with deficiencies in promotion and marketing.

II.2. Algeria’s Tourism Potential:

Despite the aforementioned constraints, Algeria possesses significant tourism assets that constitute fundamental pillars of the sector. The country is endowed with a rich civilizational, cultural, and

religious heritage shaped by successive civilizations throughout history.

The main natural and historical endowments of Algeria can be summarized as follows: (Bouamoucha, 2012, p. 107)

- Location:

Algeria represents the beating heart of the Maghreb and serves as Africa's gateway to Europe and the Mediterranean. It combines both African and Mediterranean characteristics, making it unique in its geographical and cultural positioning. With an area of 2,381,741 km², Algeria is the largest country in Africa. It also has a coastline stretching over 1,600 km, characterized by breathtaking landscapes and beaches.

- Natural:

Regions Algeria is divided into natural regions extending from east to west in parallel belts:

- The Coastal Region: A narrow strip running along the Mediterranean coast.

- The Tell Region: Comprising several low coastal plains and higher inland plains, enclosed by mountain ranges.

- The Sahara Region: Covering nearly 80% of the national territory, it constitutes the largest part of Algeria's land area.

- Climate:

Algeria enjoys remarkable climatic diversity:

- The North: Mediterranean climate, warm and dry in summer, mild and rainy in winter, with relatively high humidity. Annual rainfall ranges between 400–1000 mm, and temperatures vary between 25°C in summer and 11°C in winter.

- The High Plateaus: Semi-continental climate, cold and humid from October to May, with temperatures occasionally dropping below 5°C in some areas.

- The South: Characterized by extreme summer temperatures exceeding 40°C, large climatic variations, and very low annual rainfall not exceeding 102 mm. Winds and aridity are among its defining features.

- Vegetation:

Vegetation in Algeria varies according to rainfall distribution:

- Coastal Highlands: Dominated by maritime pine, Aleppo pine, oak, cork oak, as well as beech and evergreen oak forests in higher altitudes.

- High Plateaus: Dense olive groves on elevations above 1,300 meters.

- Steppe Zones: Rich in esparto grass (*Stipa tenacissima*).

- The Sahara Desert:

The Algerian Sahara, the second largest desert in the world, covers nearly 2 million km². It is a prime destination for international tourists, admired for its striking landscapes, majestic silence, and mountains. It is home to the Hoggar and Tassili national parks, renowned for prehistoric rock paintings dating back to the Stone Age, as well as volcanic mountains of captivating beauty. The Hoggar, in particular, is celebrated by UNESCO as offering the most magnificent sunrises and sunsets in the world. Desert tourism, however, requires significant investments to upgrade and modernize its facilities. (Chebouti, 2011, p. 85)

III- Strategy for the Promotion of the Tourism Sector in Algeria: Prospects 2030:

III.1. The National Tourism Development Master Plan 2030:

The Tourism Development Master Plan (SDAT) for the 2030 horizon constitutes a reference framework for a new policy adopted by the Algerian state. It forms part of the National Spatial Planning Scheme 2030 (SNAT) and clearly reflects the state's aspirations in the field of sustainable development. (BENMIR & MESNADI, 2025, p. 48) This plan contributes to achieving a threefold balance encompassing social progress, economic efficiency, and environmental sustainability.

On this basis, and within the framework of sustainable development, the state guides its strategic policy for tourism planning at the national level as a whole. The plan was developed based on a set of studies, consultations, surveys, and dialogues involving national and local stakeholders, both public and private. Through this integrated vision, Algeria reaffirms its commitment to enhancing national tourism development in order to foster sectoral growth and position the country as a future tourism destination.

Given Algeria's considerable tourism assets, it is expected that the supply of tourism services will be diversified in accordance with the diversity of demand. This will be achieved through the development of new areas focused on the valorization of cultural and civilizational heritage, notably via the restoration of archaeological sites and historical landmarks—a role carried out at the national level by the Ministry of Culture, as illustrated by the rehabilitation projects in Algiers' Casbah and in Tlemcen.

The diversification of the tourism offer is also reinforced through the exploitation of available resources in fishing and marine sports-related activities, with the aim of responding to global demand trends. The plan proposes six branches requiring either comprehensive or sectoral upgrading: (Smagini, 2014, p. 121)

- Mediterranean positioning through the “Blue Plan”, covering coastal cities such as Annaba, Jijel, Béjaïa, Boumerdes, Algiers, Tipaza, Mostaganem, Oran, Aïn Témouchent, and Tlemcen;
- Promotion of Saharan and trekking tourism, focusing on the cities of Biskra, El Oued, Ghardaïa, Djanet, Tamanrasset, El Guerrara, Béchar, Naâma, and El Bayadh;
- Development of urban and business tourism under the “Urban Tourism Plan”, targeting major cities such as Annaba, Constantine, Algiers, Oran, and Ghardaïa;
- Identification and promotion of health and therapeutic tourism, in areas such as Guelma, Biskra, Blida, Aïn Defla, Mascara, and Saïda;
- Launching of cultural and religious tourism linked to seasonal events and festivals, particularly in Tebessa, Souk Ahras, El Tarf, Batna, Sétif, Mascara, Tipaza, and Illizi;
- Focus on high-end niche tourism, highlighting value-added activities such as golf, aerial sports, and water sports.

The following table presents the number of designated Tourism Expansion Zones across the national territory:

Table (1): Tourism expansion areas

Year	2018	2019	2020	2021	2022	2023
Number of Tourism Expansion Zones	225	225	224	224	249	249

The source: Ministry of Tourism and Handicrafts, 2025

From the above table, it can be observed that the number of Tourism Expansion Zones has remained almost unchanged throughout the study period. This stands in contrast to the objectives set by the Ministry of Tourism and, more broadly, by the Algerian state within the framework of the National Tourism Development Master Plan 2030.

The Tourism Development Master Plan for the 2030 horizon outlines five critical dimensions, in addition to the Tourism Quality Plan and the Public–Private Partnership framework, as well as the financing mechanisms for the sector, as follows: (Charef & Bouamama, 8-7 April 2008)

- Enhancing Algeria’s tourism destination: by structuring the registered tourism destination, increasing competitiveness, and creating diverse, high-quality tourism offers;

- Launching tourism excellence hubs: through the structuring of tourism hubs that serve as an international model for tourism development, while strengthening these hubs by improving service quality and promoting their tourism image;

- Implementing the “Quality Plan” in the tourism sector: a necessary step to ensure distinctive, well-categorized tourism offers that correspond to the profiles of national and international customers, whose expectations and demands are steadily increasing;

- Establishing Public–Private Partnerships: aimed at mobilizing all public and private stakeholders for the development of the tourism sector, given that tourism growth requires coordination across multiple economic sectors;

- Developing a financing strategy for the tourism sector: in order to ensure the previously mentioned dynamism, a practical financing strategy is required. This strategy primarily aims to support investors through adequate measures designed to promote investment in the tourism sector, taking into account the specific nature of such investments.

The following table illustrates the status of tourism projects:

Table (2): The development of the number of tourism projects in Algeria

Year	2018	2019	2020	2021	2022	2023
Projects under implementation	799	889	804	747	701	674
Suspended projects	181	239	308	342	427	455
Non-initiated projects	1163	1220	1380	1385	1342	1017
Completed projects	67	107	87	111	92	89
Total	2210	2455	2579	2585	2562	2235

The source: Ministry of Tourism and Handicrafts, 2025

From the above table, we observe stability in the number of projects under implementation, with a slight decline in 2023.

However, completed projects represent only slightly more than 10% of the total each year. It is worth noting that the sum of projects not yet initiated and those suspended is approximately double the number of projects under implementation. This raises several questions regarding the administrative and financial obstacles hindering the launch or continuation of projects, which will inevitably impact the achievement of the objectives of the National Tourism Development Plan 2030.

The national awareness of tourism development as a driver of economic and social growth necessitates the development of a strategic framework and vision for 2030, in support of the objectives outlined in this plan. Through this framework, the new tourism strategy aims to achieve five key objectives:

- Position tourism as a contributor to economic growth and as an alternative to the hydrocarbons sector;
- Ensure the involvement of other sectors, such as public works, agriculture, and culture;
- Reconcile tourism promotion with environmental protection;

- Enhance the value of historical, cultural, and religious heritage;
- Permanently improve Algeria's image.

The literature suggests that the relationship between tourism openness and revenues may vary depending on the short- and long-term effects, (MESSANI, 2024, p. 390) and the following table illustrates the contribution of the tourism sector to the Gross Domestic Product outside the hydrocarbons sector:

Table (3): Share of Tourism in GDP (outside hydrocarbons)

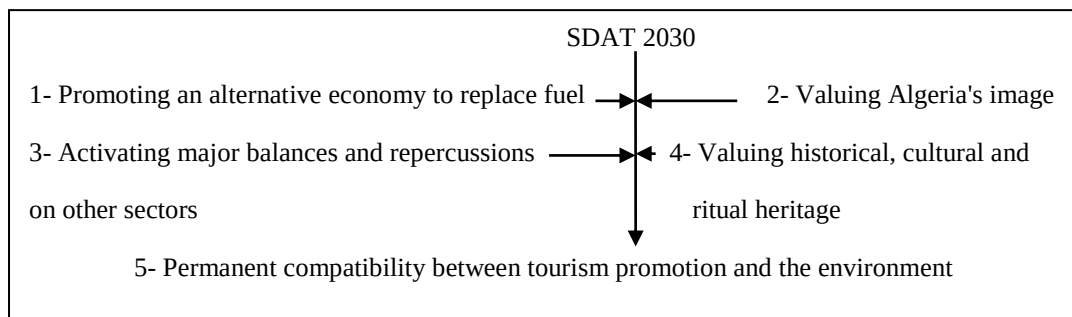
Year	2018	2019	2020	2021	2022	2023
Tourism share in GDP (%)	-	1.38	0.61	0.81	1.06	1.47

The source: National Office of Statistics, 2025

From the table above, we note that the tourism sector's share of GDP has been gradually improving since the COVID-19 crisis. However, the results achieved remain very modest and fall short of the planned aspirations to make tourism a contributor to the country's economic resources and an alternative to the hydrocarbon sector.

The dimensions of the master plan for tourism development can be illustrated in the following figure:

Figure (1): Dimensions of the master plan for tourism development



The source: Ministry of Territorial Planning, Environment and Tourism (currently Ministry of Tourism and Traditional Industries), 2008

The reality of achievements compared to the plan's estimates and objectives:

Given that tourism generates a slow return on investment, improving profitability requires state support in the measures indicated in the previous figure. The financing plan was adopted as follows:

- Protecting and supporting small and medium-sized tourism enterprises;
- Ensuring that tourism projects are safeguarded against suspension or dissolution;
- Attracting and protecting major national and foreign investors;
- Encouraging investment in the tourism sector through tax and financial incentives;
- Facilitating and adapting bank financing for tourism activities, particularly investment through the Tourism Investment Bank.

Despite the measures adopted to ensure the success of tourism development based on the aforementioned plan, the reality of achievements up to 2023 remains below expectations. The hotel infrastructure includes 1,638 accommodation establishments with a total capacity of 151,052 beds, as summarized in the following table:

Table (4): Accommodation Capacity by Classification category

Year	2018	2019	2020	2021	2022	2023
5* Hotels	6734	7234	7345	7613	8559	8724
4* Hotels	4746	6161	6824	7935	10223	11705
3* Hotels	5886	6427	6861	7707	9083	10505
2* Hotels	5185	5381	5995	7935	10403	11893
1* Hotels	11684	12612	12724	13027	14075	15060
Unclassified Hotels	8590	9456	9456	9456	9456	9019
2* Tourist Residences	384	384	384	384	384	400
1* Tourist Residences	313	313	313	313	806	806
2* Motels	93	93	93	93	152	209
1* Motels	30	86	86	148	168	280
2* Rural Inns	16	16	16	16	16	16
1* Rural Inns	20	20	20	20	20	20
3* Holiday Villages	274	274	274	274	434	434
2* Holiday Villages	0	0	0	0	0	625
1* Holiday Villages	0	0	0	0	616	670
Furnished single-class hotel	91	205	205	205	205	205
Single-class family hotel	426	426	426	426	426	426
Other hotel-oriented structures	9786	9984	9984	9984	9984	9984
Single Class Rest Stop	170	170	170	170	170	170
Total Classified Establishments	54428	59242	61176	65706	75180	81151
Institutions on the path to classification	64727	66434	66438	66560	70346	69901
Total	119155	125676	127614	132266	145526	151052

The source: Ministry of Tourism and Handicrafts, 2025

From Table 04, it is observed that the evolution in the number of hotels and beds has been very modest from year to year, with occasional declines in some cases. The objective set by the plan—to reach 75,000 luxury beds in the first phase (by 2025)—remains far from being achieved. By the end of 2023, the total number of beds amounted to approximately 151,052 across all classified and unclassified hotels, which cannot be considered luxury accommodations. It is noteworthy that the number of 5-, 4-, and 3-star

hotels—which can be regarded as luxury—recorded just over 30,000 beds in total.

Table (5): Inbound Tourists to Algeria

Year	2018	2019	2020	2021	2022	2023
Algerians residing abroad	638360	437278	81295	58243	640668	1096989
Foreign tourists	2018753	1933778	509736	66995	757380	2195519
Total	2657113	2371056	591031	125238	1398048	3292508

The source: Ministry of Tourism and Handicrafts, 2025

From Table 05, it can be observed that the number of tourists arriving in Algeria, including foreigners and Algerians residing abroad, declined in 2019 compared to 2018. This was followed by two consecutive decreases in 2020 and 2021 due to health-related reasons linked to the spread of COVID-19, which nearly paralyzed the tourism sector globally and, consequently, in Algeria. Despite the slight recovery recorded in 2022 and then 2023, during which Algeria recorded more than 3 million tourists, including more than 2 million foreigners, the number of tourists targeted by the National Tourism Development Plan 2030 is far from the recorded reality. This is due to several reasons, perhaps the most important of which are: (Baddech, 2014)

- Security and stability in tourist areas;
- Lack of tourism services;
- Limited and insufficiently diversified hotel accommodation capacity;
- General lack of cleanliness, particularly on beaches;
- Transportation and mobility challenges that have caused the isolation of many tourist areas;
- Underdeveloped communication networks;

- The problem of seasonal tourism, as many destinations experience an almost complete absence of tourists outside peak seasons due to insufficient promotion of off-season cultural and recreational attractions;

- Lack of professionalism among Algerian travel agencies, which tend to focus on outbound tourism while neglecting domestic tourism;

- Difficulty in obtaining local currency through standard international exchange practices due to the absence of currency exchange offices;

- Lack of facilitation for foreigners in obtaining entry visas to Algeria.

The success of tourism sector depends also on the joint efforts of other sectors that have a direct or indirect relationship with tourism, such as the sectors of transportation, environment, healthcare, safety, culture etc that also contributes for the development of the tourism sector. (AISSA, 2025, p. 537)

Conclusion:

In general, the main results reached can be summarized as follows:

- Algeria enjoys geographical, natural, and historical diversity that qualifies it to become a distinguished tourism hub.

- The Tourism Development Master Plan Horizon 2030 represents an integrated strategy that addresses all dimensions while taking into consideration Algeria's unique tourism assets.

- A significant number of projects are either stalled or have not yet been launched, mainly due to administrative and financial obstacles.

- The contribution of the tourism sector to the national output remains very weak and extremely limited.

- Despite the increase in tourist arrivals in 2023, which exceeded 3 million visitors, this figure remains modest compared to the targets set in the Master Plan and in comparison with neighboring countries that lack Algeria's resources and historical heritage.

The shortcomings observed in terms of projects, facilities, and the number of tourists can be attributed to several factors already discussed. These are formulated as recommendations, which also represent major challenges for stakeholders in Algeria's tourism sector:

- Reinforce the seriousness of efforts in implementing tourism development projects and provide greater administrative and financial facilitation in order to achieve the objectives of the Tourism Development Master Plan 2030.

- Establish a "tourism police" to ensure compliance with tourism rules and regulations.

- Provide accessible tourism information and guiding brochures to targeted groups.

- Diversify recreational activities and improve the development of forest areas.
- Rely on awareness-raising activities that contribute to environmental preservation.
- Upgrade restaurant service standards and enforce strict regulations on vendors who fail to comply with hygiene requirements.
- Activate price control mechanisms to combat rising costs, particularly in tourist areas.
- Focus on international marketing strategies for tourism products to attract foreign tourists, while facilitating visa procedures and reducing airfares.

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