

El Azzaoui, I., Carnicelli, S., & Khodadadi; 2022; Tourism development in Algeria and the Horizon 2025 Plan; *Tourism Cases*; CAB International, Wallingford, UK.

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Title: “Tourism Development in Algeria and the Horizon 2025 Plan.”

Overview (accompanying the title): An example of a tourism development plan for international recognition aspiration and the emerging trend of domestic tourism.

## Summary

Despite Algeria's strategic geographical location as a portal to Africa from Europe and the continuous attempts to reform its tourism sector, this postcolonial country has failed to become a tourism hub in the Mediterranean area. In Algeria, the year 2008 witnessed the birth of a tourism development plan named "Horizon 2025", projecting strategies and goals to be achieved by 2025. However, the plan did not reach its expected results because of various socio-political and external issues such as the country's recent political instability and the global Covid-19 pandemic. However, surprisingly, Algeria's domestic market has witnessed noticeable growth in the last 20 years, especially during the global COVID-19 pandemic. The present case study reflects on the development of the "Horizon 2025" plan and its contribution to the re-branding of Algeria as a destination and the consequential outcomes that helped the growth of its domestic tourism market. Through the case study, we showcase the efforts made to build Algeria as an attractive destination and how Covid-19 challenged the plan's forecasted goals while paving the way for the development and promotion of domestic tourism.

### The value and interest of the case study

The case study evaluates Algeria's tourism development plan and its ambitions to become an international tourism destination. In this case study, we demonstrate that while the global pandemic and socio-political instability have disrupted Algeria's tourism agenda, the domestic market has experienced substantial growth, according to the Euromonitor report of 2021. Hence, the case study illustrates how domestic tourism became an emerging trend amid various difficulties and challenges.

## Historical and Geographical Background

Historically, Algeria witnessed settlers, conquests and invaders from various civilisations; namely the Romans (146BC-439), the Umayyad Caliphate -Arab Muslim military expansions (661-750), the Ottomans (1574-1830), and the French (1830-1962), and endured a Civil War, also known as the Black Decade (1989-1999). However, by 2000, the nation was finally able to sense peace, serenity and stability, and people felt confident enough to travel locally and explore the country. Meanwhile, authorities began preparing a tourism development strategy to revive the tourism sector. In 2008, they introduced a new campaign, called Horizon 2025, which aimed to bring Algeria back to the international arena and open

opportunities for investors to develop the tourism sector, improve services, and welcome international visitors. The plan reflects the government's aim to use the historical, cultural, and natural resources to enhance Algeria's tourism and make the country an attractive Mediterranean destination (Aouinane, 2013). The key goals emphasised in the plan are developing human resources to plan appropriate infrastructure for tourism activities, the construction of international-level hotels and leisure sites, railways and roads expansion, and the reconstruction and expansion of old hotels and touristic parks.

From a geographical perspective, Algeria is Africa's largest portal for inbound tourists to the Mediterranean region, with over 1600km of coastline. It covers an area of 2,381,741 km<sup>2</sup>, making it Africa's largest country, the tenth-largest in the world, and the world's largest Arab country. The country's northern region, where almost 90% of the population resides, consists of various natural and human-made assets. Its tourism assets include:

- Eight national parks (Belezma, Chrea, Djurdjura, El Kala, Gouraya, Taza, Theniet El Had, and Tlemcen national park) and mountains that are part of the Great Atlas Mountain chain.
- Eight national museums of art, archaeological and prehistoric-era treasures.
- Three Roman Catholic cathedrals dating back to the 1800s (the Cathedral of Sacred Heart in Oran, St. Augustin Basilica in Annaba, and St. Mary's Cathedral in Oran).
- Six popular mosques, one of which is Djamaa el Djazaïr, the third-largest mosque in the world and the tallest building in Africa.
- Five UNESCO World Heritage Sites (Beni Hammad Fort, Djemila and Timgad (preserved ruins of two Roman cities), Casbah of Algiers (a walled citadel), and Tipasa (Roman outpost established in conquered territory to secure it)) (see Figure 1).

The southern part of Algeria is the Sahara, separated from the North, with two large mountain chains stretching over 1500km from Morocco to Tunisia (see Figure 2). The Sahara covers approximately two million square kilometres, with a small population residing near oases. The region is famous for three UNESCO World heritage sites (see Figure 1);

- Tassili n'Ajjar is a sandstone rock formation covering an area of over 72,000km<sup>2</sup>, in which prehistoric engravings narrate climatic changes and human evolution since 7000 BC.
- The M'Zab Valley is a traditional human habitat with indigenous engravings.
- The Hoggar Mountains, a highland region in Central Sahara, covers approximately 550,000 km<sup>2</sup> of land and displays prehistoric paintings dating back to 6000 BC.



Figure 1 UNESCO Heritage Sites in Algeria

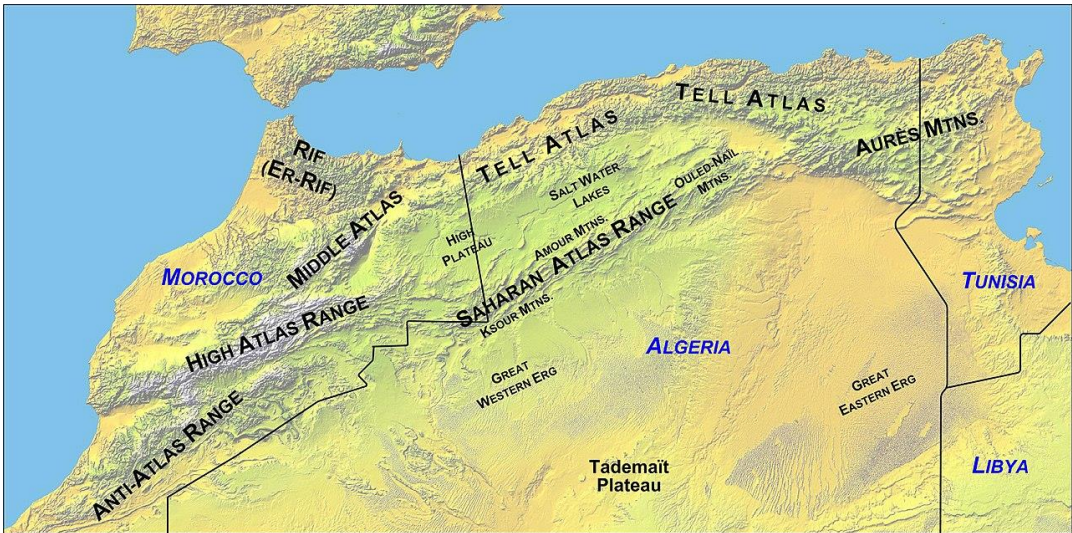


Figure 2 Atlas Mountains in North Africa (source: Williamborg, 2016)

## Horizon 2025 Plan and Emerging Trends

### Tourism Development in Algeria and the [Horizon 2025](#)

When Algeria gained independence in 1962, the government launched a construction and renovation process in many sectors and industries. The French colonisation's culturally and socially destructive outcomes led the Algerian authorities to focus mainly on crucial sectors like education, health, agriculture, and the construction and manufacturing industry, considered to be the nation's pillars and the most important sectors for a postcolonial country. Due to the lack of financial resources and possibilities for a newly independent country, tourism was given little attention, with initial reforms including the creation of the Tourism Ministry in 1963 and the National Office of Algerian Tourism (ONAT) with the aim of gradually evaluating and developing tourism programmes, and protecting and renovating touristic sites. In the early stages of the new government, a lack of finances encouraged the authorities to allow foreign investors to bring their businesses to new soil and help Algeria access the international market. Later on, the tourism ministry was continuously setting strategies and investment plans to renovate the coastal cities and develop accommodation and hotels, protect the cultural, historical, and religious diversities across the country, create transportation lines to link cities, facilitate administrative regulations and money exchange, and create links with tour operators, both locally and internationally.

From 1966 to 1989, the tourism ministry focused mainly on refurbishing Northern cities by building hotels, attraction sites and urban facilities as part of the country's drive to 'modernise'. However, according to Zytnecki (2013), Algeria has always been a destination known for its oriental characteristics and Islamic heritage, and both features ought to be preserved and promoted for tourism prosperity.

The period of 1989-2005 witnessed major instability across the country. At this time, tourism could not grow due to the Civil War and its consequences (i.e., fear, terrorism, poverty, and grief). Therefore, it was essential for the Algerian government to find solutions, revive its industry, and truly construct a strong destination image.

By 2008, and in the context of promoting Algeria's destination image to the global market to attract more tourists and counteract negative stereotypes (e.g., terrorism, lack of safety, underdevelopment and poverty), Horizon 2025 was developed by Algerian tourism experts and the French Committee of Observation, Development and Tourism Engineering (ODIT France). The collaboration was launched based on three years of research and evaluation of previous tourism strategies to accommodate tourists' needs for originality and a natural atmosphere (Yahiaoui, 2017).

The tourism development plan aimed to develop the sector as part of the economic diversification strategy set by the government, allowing more sectors to cooperate for the good of the nation's development. Hence, there was a need for reforms in transport, culture, handicrafts, agriculture, communication, hygiene, and health to ensure consistent and homogenous development (Bouadam, 2011). The plan constitutes two main stages in which various goals were to be achieved to ultimately locate Algeria as an attractive Mediterranean destination.

#### 2008-2015 Stage:

The first stage of the tourism development plan was from 2008 to 2015. Tourism experts had to evaluate existing tourism infrastructure and set the initial investments needed. The plan was to encourage developing national and international hotel chains across the country, create tourism cities of excellence, construct national parks, develop health and leisure centres for Thalasso tourism in mineral water baths, and launch 80 tourism projects in six regions to raise the number of accommodation beds (BenTalbi et al., 2018). Table 1 reflects the plan's forecast by 2015 and goals to welcome international tourists, accommodation building, tourism contribution to GDP and economy, creating jobs, and providing training in hospitality schools.

Year	2007	2015 Forecast
Number of international tourists	1.74 million	2.5 million
Number of beds	84,896 to be reconstructed	75,000 luxury beds
Tourism contribution to GDP	1.7%	3%
Contribution to Economy	US\$2.5 million	US\$1.5-2 billion
Direct and Indirect Jobs	200,000	400,000
Tourism training seats in hospitality schools	51,200	91,600

Table 1- Guideline for Tourism Development for the Horizon 2025, (source : “Le Plan Stratégique : les cinq dynamiques et les programmes d’actions touristiques prioritaires, 2008)

In 2015, the Ministry of Tourism reviewed the plan's progress as part of the evaluation process and checked if the goals of the first stage had been achieved.

	Goals	Results
Inbound Tourists'	2.5 million	1.71 million
Beds	159,869	102,244
Contribution to GDP	3%	1.2%
Contribution to economy	US\$1.5-2 billion	US\$304 million
Direct and Indirect Jobs	400,000	265,803

Table 2 – Review of Horizon 2025 Progress in 2015 (source : Ministère de l’Aménagement du Territoire de l’Environnement et de Tourisme)

As shown in Table 2, the plan did not accomplish all the goals identified in its agenda. The tourism sector aimed to generate a minimum of US\$1.5 billion for the economy, yet it only generated US\$304 million in 2015. These statistics reflect the tourism industry's contribution to the GDP of 1.2% when it was forecasted to reach a 3% contribution.

The number of tourists arriving in Algeria did not reach the forecasted 2.5 million arrivals either, indicating the weakness in branding Algeria as a desirable destination and failure in surpassing the 2007 statistics of tourist arrivals. However,



as shown in Table 3, progressive growth in the number of inbound tourists was witnessed during the first phase.

Year	Number of International Tourists (million)
2008	1.77
2009	1.91
2010	2.07
2011	2.40
2012	2.63
2013	2.73
2014	2.30
2015	1.71

*Table 3 Number of international tourists in Algeria 2008-2015 (source: UNWTO)*

As for the number of beds to be reached, the target was also not met. The delay was directly linked to bureaucratic hurdles for investment and a lack of finance to complete the accommodation projects and hotel construction. Hence, the predicted number of direct and indirect jobs in the hospitality sector was adversely affected.

#### 2015-2025 Stage:

The second stage of the tourism development plan is from 2015 through 2025. The stage is an ongoing process to achieve the goals set regarding accommodation and airport expansions, creating more leisure sites, and facilitating transport through air, road, and rail. At this stage, the Algerian Ministry of Tourism is still focusing on achieving the first goals set and finalising the uncompleted projects. According to the UNWTO, Algeria witnessed gradual growth in international tourist numbers between 2015 and 2018, as shown in Table 4. However, 2019 saw a decline in tourists' numbers. This drop was related to fear of a potential Arab Spring after the public's demands for political change and social justice.

Year	Number of International Tourists (million)
2015	1.71
2016	2.04
2017	2.45
2018	2.66
2019	2.37

*Table 4 Number of international tourists in Algeria 2015-2019 (source: UNWTO)*

The Algerian Ministry of Tourism recently updated the tourism development plan, now called Horizon 2030, while keeping the same goals and reinforcing their efforts. This expansion in the plan's duration seeks to rectify the delays and provide additional time to pursue all the agreed-upon goals when the plan was launched.

The plan as a whole was primarily driven to promote Algeria's image for foreign tourists, with little interest in the domestic market. However, the global pandemic of Covid-19 caused unprecedented disruption to Algeria's and the world's industries. The global pandemic affected Algeria's tourism plan and led to all projects being put on hold until the situation was managed. The Algerian government set a borders closure policy as of March 2020 to curb the spread of the Coronavirus (Farrah, 2020). Hence only Algerian nationals with substantial motives were allowed to enter. For safety and health measures, Algerians were prevented from leaving the country for tourism purposes. This policy has led to an unexpected outcome. With the inability to travel abroad for tourism purposes, Algerian travellers became more interested in Algerian destinations, specifically cultural and heritage sites.

### Why the sudden interest in domestic cultural tourism?

Algerian citizens forged a new habit and became more confident to travel locally, especially in the early 2000s. In recent years, railroad and highway developments have further facilitated this mobility. Additionally, social media platforms gained popularity in an era of globalisation and technological advancements (see table 5). They offered more convenience for Algerians to plan their holidays based on other travellers' opinions regarding popular destinations and mobilise internally to experience new challenges and travel opportunities. As a result, digital marketing became a popular strategy to promote products, services, and places. Algeria's domestic tourism has benefitted from the digital marketing strategy as it helped shape electronic word of mouth recommendations (e-WOM) and provide visual access to destinations to ease decision-making processes for people. Hence, the number of domestic leisure trips gradually grew (see table 6), coinciding with the period in which the number of active users on social media exponentially grew.

	Jan 2017	Jan 2018	Jan 2019	Jan 2020	Jan 2021
Number of Active Social Media Users	18 million	21 million	23 million	22 million	25 million

Table 5 Number of Active Social Media Users in Algeria January 2017-January 2021 (source: Datareportal.com)

Year	2015	2016	2017	2018	2019	2020
Number of domestic leisure trips	1.49 million	1.54 million	1.59 million	1.65 million	1.72 million	1.42 million

*Table 6 Number of Domestic Leisure Trips in 2015-2020 (source: Euromonitor International; Passport, Travel in Algeria: October 2020)*

Algerian social media content creators, also called influencers, play a major role in endorsing and shaping local travellers' attitudes and opinions regarding certain destinations and travel agencies' offers on social media. The significant influence of the e-WOM motivated travel agencies in Algeria to seize the opportunity to advertise their destination offerings through travel content creators (Momtaz et al., 2011). With such a strategy, a larger reach of the promoted offers is ensured and results in gaining new customers influenced by the travel content creators. Out of all Algerian destinations advertised digitally through content creators, the Sahara gains higher interest from Algerian travellers. Such compelling interest resulted from the host communities' integration of culture in travel agencies' offers and their constant desire to celebrate their cultural heritage through annual festivals. With attempts to make the tourists' experiences memorable, travel agencies aim to focus on the tourists' involvement with the destination, the pleasure stemming from the social interaction with the host communities, and the intellectual cultivation gained from experience (Karayilan and Cetin, 2016). However, despite the efforts in e-marketing campaigns and travel agencies' offers, numerous challenges are constantly hampering the ability of the tourism sector to succeed internationally.

## **Challenges Affecting Tourism Development in Algeria**

Tourism in Algeria faces numerous challenges in achieving its Horizon 2030 goals and becoming a key player on the Mediterranean coast. The difficulties in developing the sector are mostly organisational, with governmental authorities neglecting tourism's importance to the country's GDP. Algeria's business climate is a challenging one, with numerous bureaucratic and financial limitations on private investments. It is difficult for a national or foreign investor to build a private business without facing complications. In addition, the banking system is mostly state-dominated and does not provide currency exchange bureaus for foreigners

or at the level of their branches. Instead, there is a reliance on the so-called "black market" in which currencies are exchanged above the official prices.

From another perspective, Algeria's natural gas and petroleum reserves led authorities to an almost full dependency on the hydrocarbon industry and its revenues (Camporeale et al., 2021). The authorities focus on petroleum and gas, which accounts for almost 85% of the country's annual exports, and the neglect of investment in the remaining sectors has affected the development and progress of the country's viable sectors, including tourism.

Regardless of the country's wealth of natural resources, it is relatively poor, with 35% of the population living below the poverty line, earning US\$1.45 per day, according to LADDH (The Algerian League of Defence for Human Rights). The poverty issue hinders people's ability to travel and spend on leisure activities and hotels. In addition, the Algerian currency depreciation in the international market in 2015 led to inflation in the prices of tourism services and products, which drove people away from purchasing the services provided and towards convenient and affordable options.

With the inability to afford tourism services, people are more likely to opt for short stays, solo travelling, and visiting friends and family. Nevertheless, these are not the ultimate options in a postcolonial country with an atrocious history of violence and trauma. The Algerian society still shows signs of fear and insecurity when travelling, denoting a deeply rooted psychological dilemma triggered throughout generations (Lazali, 2018). These feelings negatively affect social freedom and the individuals' rest and wellbeing, especially when dealing with terrorism, societal damage and cultural translatability. The road to eliminating the sources of "unfreedom" and 'immobility', like poverty and social unrest, is a challenging process for authorities and decision-makers. They continuously attempt to develop Algeria as a desirable destination and revive related sectors but provide little emphasis to solve societal issues.

Domestic tourism grew rapidly and autonomously regardless of the many issues within Algerian society and their impact on the tourism industry. Since the pandemic affected all sectors globally, domestic tourism in Algeria has witnessed considerable growth, especially after the border closure policy, according to Asma Lahou, the Algerian tourism representative and spokesperson. Travelling abroad was not allowed unless substantial reasons were provided (for example residing abroad, or providing a work invitation), while in previous years, Algerians were travelling to affordable destinations for tourism purposes, like Tunisia, Spain, and Turkey. This policy limited the options for Algerians to solely domestic destinations

while digital content creators were the main source of visual content to promote affordable and attractive cultural sites in a country with multiple natural assets.

The challenges mentioned above are continuously affecting travellers, but their desire to explore domestic destinations and learn about their country's richness surpassed them. Such enthusiasm helped shape the knowledge about local destinations and influenced more people to travel. In this context, societal issues are mostly seen as daily struggles that Algerian society is accustomed to rather than as limitations for leisure and travel.

## **Final Thoughts: Algeria – What is Next?**

On a societal level, the primary initiative for authorities to focus on should be improving the infrastructure and tourism-related services. Once achieved, more job opportunities will prevail to reduce the poverty rate and criminal behaviour, enhance citizens' lives, and provide a safe environment for foreign tourists.

As for the administrative legislation of the tourism industry, it is important to regulate bureaucratic rules of investments to ease the establishment of national and international businesses. Improving regulations and setting an open platform for these businesses will increase the competitiveness among service providers to lower their prices, improve their quality, and increase demand from domestic tourists. The initiative will benefit the domestic market and create societal ease. On the one hand, the Algerian society will be accustomed to tourism trends and be familiar with the concept of mobility. On the other hand, the emerging awareness of tourism and mobility will reduce social issues and set the ground rules for plans aimed at the international scale. Hence, accomplishing Horizon 2030's primary aims of reforming the tourism sector will be reached once further requirements are added internally, such as establishing cooperation and bridging boundaries with the remaining sectors for the sake of enhancing Algeria's image, both nationally and internationally.

From a political perspective, Algeria witnessed a drastic shift of power and a rising fear of a potential Arab Spring in February 2019 when Algerians protested peacefully every week against the former president's right to a fifth mandate. The Hirak (the Arabic word for "movement") across Algeria imposed pressure on the political ruling power, asking for a change for a better-built nation. During this period, the government's primary focus was to ensure stability and prevent another Civil War while managing the country's vital sectors. Out of fear of terrorist attacks and potential civil war, the year 2019 marked a slight decline in

international tourists' arrivals compared to 2018, with 2.37 million arrivals in 2019 and 2.65 million arrivals in 2018.

The year 2020 witnessed the unprecedented global pandemic linked to Covid-19, causing a sudden global shutdown. For health reasons, the protests were halted. As for the newly elected government, the state had tough measures to cope with, having no chance to proceed with the people's aim to build the nation. Consequently, Horizon 2030 was affected by the people's protests against the government and the pandemic, leading to delays in reaching the strategy's goals. Lastly, although these challenges are prevailing and complicating the development of the tourism industry in Algeria, it is necessary to consider setting reasonable and attainable milestones. Most importantly, the tourism sector must prioritise the domestic market in the branding plan and thrive to grow beyond the stereotypical labels of a poor third-world country and terrorism association for a future aimed at gaining the interest of international tourists.

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