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Destination Libya: Developing Libya as an Internationally – Competitive Tourism Destination

By

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Declaration

I declare that this work has not previously been accepted in substance for any degree and is not being concurrently submitted for any other degree. I further declare that this thesis is the result of my own independent work and investigation, except where otherwise stated (a bibliography is appended). Finally, I hereby give consent for my thesis, if accepted, to be available for photocopying and for inter-library loan, and for the title and abstract to be made available to outside organisations.

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Dedication

I dedicate this work to my mother and father who provided me with unbounded support and encouragement.

I also dedicate this work to my wonderful teachers, tutors, supervisors and anyone else who taught me, especially those at Kiklah's Secondary School. Additionally, a particular dedication goes to my brothers Nasir, Adub-Almunim and Salah, and also to my uncles Hussian Omar Ali and Mohammed Abid-Alnabi.

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Abstract

Libya is an emerging tourism destination in the Middle East and North Africa (MENA) region. Early efforts to encourage tourism in the 1990s were re-energised after the lifting of UN sanctions in 2003 following dramatic changes in Libya's foreign policy. Despite a healthy economy, high rates of unemployment (30%) combine with a dominant source of income - oil - which contributes 95% of GDP. Thus Libya is considering tourism for economic diversification. This thesis explores the challenges that face Libya in this endeavour and develops a best practice model (SCDM2) to help Libya achieve its ambitions as an internationally-competitive tourism destination.

Data collection from key stakeholders in the Libyan tourism product (government officials, tour operators, hotel managers, tourists and local communities) involved five qualitative methods (focus group interviews, semi-structured interviews, document analysis, audio-visual materials and participant observation).

Libya is a unique destination with: long untouched coastal beaches; stunning and well-preserved Roman and Greek antiquities; amazing desert adventure opportunities; pre-historic civilisations; generous and hospitable people. Despite being very safe, Libya has an image problem in the UK: desert; hot; a culture similar to other Arab countries; controlled by Qudaffi who promotes anti western policies. The tourism industry faces enormous challenges, mostly related to the absence of a clear strategy for tourism development: destination accessibility; poor protection for tourism attractions/antiquities; weak human resource development, environmental and quality service issues.

The demand side of SCDM2 focuses on destination image. The supply side addresses destination elements: destination accessibility; destination planning and management; supporting resources; local communities; comparative advantage; the significance of global environment.

The thesis concludes that despite good comparative advantage there are major challenges to delivering appropriately-priced, high-quality products enabling Libya to compete with other MENA destinations and makes a number of recommendations to Libya's decision-makers to address the key challenges.

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List of Abbreviations

ABTA	Association of British Travel Agents
AFOM	American Federal Office of Management
ATMs	Automatic Timing Machines
ATOL	Air Travel Organisers License
BBC	British Broadcasting Corporation
CBC	Canadian Broadcasting Corporation
CIA	Central Intelligence Agency
CSR	Corporate Social Responsibility
DMOs	Destination Marketing Organisations
EA	Environment Audit
EDE	Economic Development Board
EFQM	European Federation Quality Model
EIA	Environment Impact Assessment
EU	European Union
EWP	Executive Wilderness Programmes
GBTTI	General Board for Tourism and Traditional Industry
GDP	Gross Domestic Product
GICD	General Corporation of Infrastructure and Constructive Development
GMRA	Great Man-made River Authority
GPC	General People's Committee
HRD	Human Resource Development
HRM	Human Resource Management
ICC	International Chamber of Commerce
ICC	International Chamber of Commerce
IEU	Intelligent Economic Unit
ILO	International Labour Organisation
IQM	Integrated Quality Management
IT	Information Technology
LD	Libyan Dinar
LGPC	Libyan General People'
MBC	Middle East Broadcasting Centre
MENA	Middle East and North Africa
NTDP	National Tourism Development Plan
OECD	Organisation for Economic Co-operation and Development
OPEC	Organisation of the Petroleum Exporting Countries
SCDM	Sustainable Competitive Destination Model
SMEs	Small and Medium Enterprises
SWOT	Strengths, Weaknesses, Opportunities and Threats
TBLS	Triple Bottom Line Sustainability
TDI	Tourism Destination Image
TIES	The Internet Ecotourism Society
TNSW	Tourism New South Wales
UAE	United Arab Emirates
UK	United Kingdom
UN	Untied Nation
UNESCO	United Nations Educational, Scientific and Cultural Organisation

UNWTO	United Nation World Tourism Organisation
US	United State
UW	United World
WFP	Work Force Plan
WTO	World Tourism Organisation
WTTC	World Travel and Tourism Council

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Chapter 1: Introduction

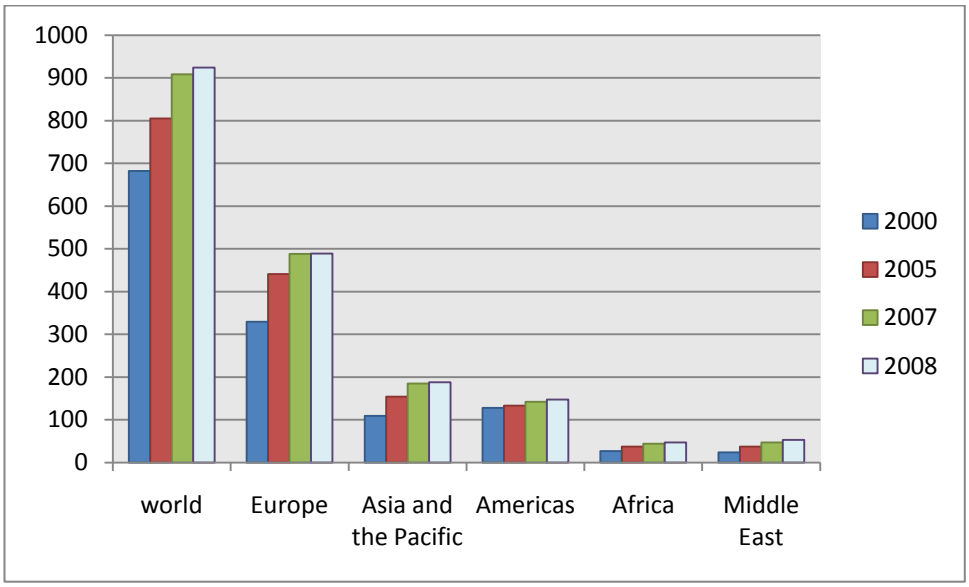
1.1 Background

The United Nations World Tourism Organisation (UNWTO) reported that 2008 was a turbulent year for the tourism industry, with a dramatic decline in international arrivals and there is no sign that this downward trend will recover in 2009 (UNWTO, 2009). However, despite this downturn tourism remains an important source of Gross Domestic Product (GDP). By 2016 the contribution of the tourism industry is expected to increase to 12% of World GDP, and employ about 13% of the total population (Ianniello, 2007).

> *The growth in international tourist arrivals has slowed drastically worldwide under the influence of an extremely volatile and unfavourable global economy - due to factors such as the credit crunch, the widening financial crisis, commodity, oil price rises, and massive exchange rate fluctuations.*
>
> (UNWTO, 2009, p.5)

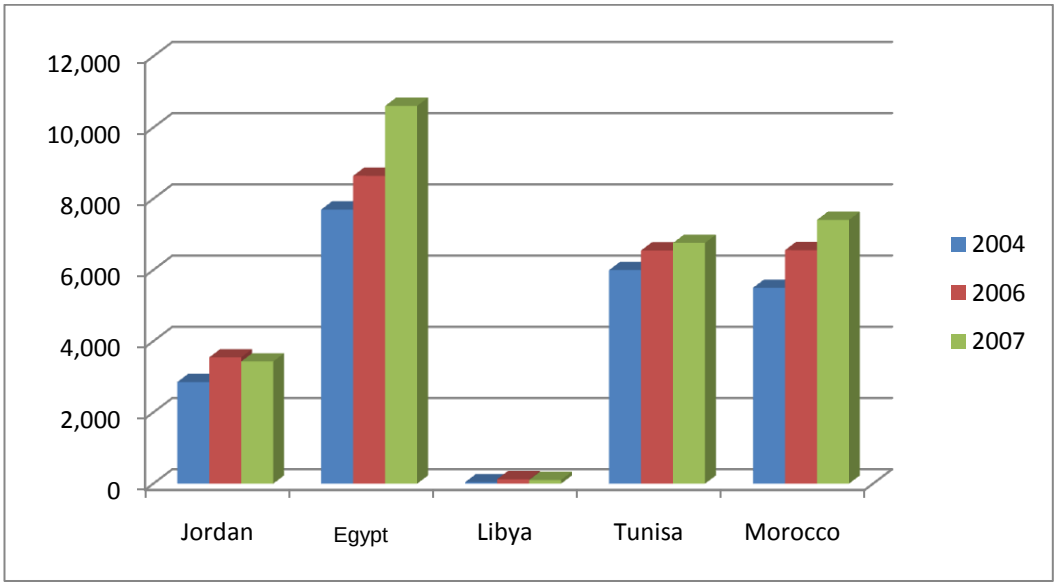
Despite the decline of international arrivals worldwide, the Middle East experienced a significant increase in performance of 11% (see Figure 1.1). In 2008, the number of international tourist arrivals increased in the Middle East area to a total of over 52 million. The biggest increase was recorded by Egypt, which increased by 23.8%, whereas Tunisia grew by 5.4% and Morocco by 7.9% (UNWTO, 2009). According to the Libyan General Board for Tourism and Traditional Industry (GBTTI), the number of international arrivals declined by 19%, from 125,480 to 105,997 tourists. Figure 1.2 shows the gap between Libyan international arrivals and its competitors.

Figure 1.1: International tourist arrivals by region



Source: UNWTO (2009, p.3)

Figure 1.2: International arrivals in the main MENA countries

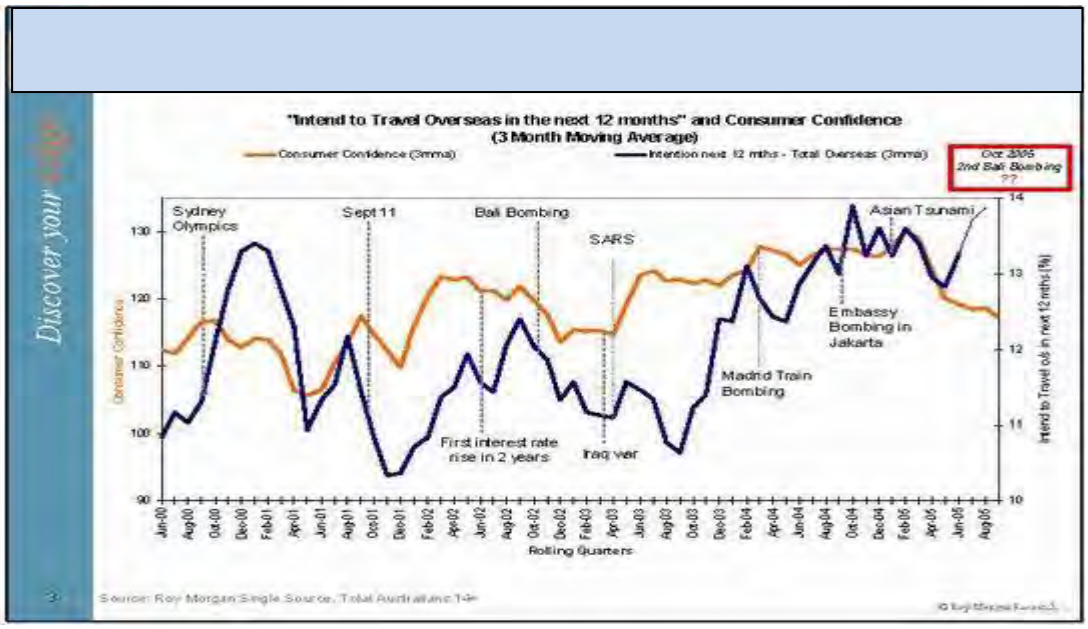


Source: Adopted from UNWTO (2009) - The number of international arrivals for Libya passed on to GBTTI (2008) reports

The tourism industry is becoming increasingly competitive, dynamic and influenced by global issues (Heat, 2003). According to Levine and Iannielo (2005), travel and tourism in the twenty-first century are being shaped and influenced by many global forces: Globalisation as a phenomenon has had a huge impact on the tourism industry worldwide and international events, such terrorism and war, have restricted the growth of the tourism globally. Figure 1.3 shows the impacts of major global terrorism and wars. Despite terrorism attacks, wars and natural disasters, tourism appears to have a bright future and the globalisation phenomenon will continue (Holjevac, 2003). Because of uncertainty and the impact of globalisation, UNWTO (2009, p.8) claims that:

> *It is more critical than ever before to work closely together in the tourism value chain - between the public and private sectors, and destinations and the travel trade.*

Figure 1.3: Globalisation and the effects of terrorism, war and pandemics



Source: Levine and Iannielo (2005)

Attractive prices and relatively short-haul flights for European tourists, mean that sun and beach destinations (such as Egypt, Tunisia and Morocco) remain the most popular, whilst Jordan (known for its cultural tourism product) has experienced steady growth. Travel and tourism is an increasingly important sector for most Middle East and North Africa (MENA) countries and is a vital source of foreign exchange. It is also a generator of employment opportunities and a means to reduce dependency on other economic sectors, such as the oil industry (UNWTO, 2004).

The Libyan economy mainly relies upon income from the oil industry. In fact, oil sales contribute about 95% of export earnings, which accounts for one quarter of the GDP and covers approximately 60% of the state sector wages (CIA, 2009). Thus, the boom in the oil industry and its relatively small population has given Libya one of the highest GDP's per capita in Africa. Libya is still some way from achieving the liberalisation of its economy, but some progress has been made, such as applying for UNWTO membership, announcing plans for privatisation and inviting direct foreign investment (CIA, 2009).

> *The oil and gas industry is the driving force behind Libya's economic development, providing the massive investment needed for the country's ambitious infrastructure plans. To sustain the impetus, Libya is already mid-way through its short-term plan to raise its oil production from the 2006 level of 1.6 million b/d to 2 million b/d by 2010, with longer-term ambitions to raise it to 3 million b/d by 2015.*
>
> (National Oil Corporation, 2009, p.1)

The Libyan General People's Congress (LGPC) has also decided to fully open its doors to local and foreign investors and to exempt them from tax. In this way they may invest in particular profitable sectors, such as tourism, fishing and agriculture, and diversify the economy (LGPC, 2004). Business Week reported on 14 March 2007 that son of

Libyan leader Muamer Qudaffi, Saif al-Islam, had made extraordinary efforts to integrate Libya into the international community. He also invited Professor Michael Porter and the Monitor group, a consultancy firm, to plan how Libya could develop and diversify its economy to meet future challenges (Reed, 2007a). Saif al-Islam has not just solved most of Libya's complicated political issues, but also he is adopting a programme for developing Libya with a new vision.

Although Libyans have high expectations for their tourism development, there are many challenges facing the tourism industry and considerable work needs to be undertaken to develop the country as a competitive tourism destination. It may however surprise many people that Libya possesses some of the most interesting archaeological ruins in the world, dating back to the Roman and Greek periods, including some well-known World Heritage sites (Mahmood, 2007).

Today, global competition in the tourism industry is intense and marketing strategies play a critical role in successful tourism destinations. Destination marketers therefore have to position particular locations as favourable destinations in the minds of potential tourists (Lee, 1999). This can be achieved by creating a positive image of the destination (Mill and Morrison, 1992) accompanied with the creation of brand saliency vis-à-vis competitor destinations (Pritchard and Morgan, 1998; 2004).

1.2 The autobiography of the researcher

The researcher has come to the study of tourism from a totally different discipline. He gained his first degree in Business Administration from the Gar-Younis University in

1988. This was followed by a pre-MBA in 1999 from the MLS International College in Bournemouth (UK) and in 2001, he obtained a Master's degree in International Business Administration from Northumbria University- Newcastle (UK). In addition, he worked part-time as a tutor, teaching marketing principles, human resource management and personal management at the Yefrin and Gharin High Institutes. Since then the researcher has come to realise that Libya has very few people qualified in marketing, despite this being a subject that has become increasingly important for manufacturing organisations and service providers. From 1995 to 1998, the researcher was also appointed as head of the financial department in the General People's Committee of Education and Vocational Training.

From 2001 until 2005 he was a director of the Shift to Production Fund at the Gharin Branch in Libya when the Libyan government decided to send him to the UK to study for a PhD degree. The Shift to Production Fund is a state bank which aims to shift over-employment capacity from the state sector to the private sector through the granting of easy loans; it also provides primary requirements and facilities to support the establishment of small and medium-sized businesses. This position enabled the researcher to become a member of the local planning council in the province of Gharin. Here, he gained significant experience in government polices and planning processes and was also able to identify the obstacles facing the planning, organising, executing and controlling of projects. The researcher and the research itself are very much interlinked. They work as elements in open system where both affect, and are affected, by the surrounding environment. The researcher experienced many difficulties in relation to the Libyan government planning, management and performance.

Many Libyans, including the researcher, have doubts about developing the country under the current situation. For instance, when the researcher was a director of the Shift to Production Fund, he reported to two different line managers - the head of the bank and the secretary of People's Committee of Gharin province, who had very different objectives. Both had come to power through political decisions. At official meetings the researcher was often not in agreement with them. Time has shown that the researcher was right, for example, in objecting to the establishment of a ware and ceramic factory and the development of the Gharin water project. After five years the factory had still not been completed and only about 70 per cent of building had been developed. Equipment imported in 2006 remain boxed and in poor storage. The location of the factory is distance from potential labour and water resources. Also the contract for the project places management control in the hands of foreign managers who have little understanding of local culture and traditions. The Gharin water project is a second example of problems. When the project was completed they discovered that the well did not have any water - a point which had been raised four years previously by the researcher. A final example relates to when the head of the Shift to Production Fund threw out a report prepared by the researcher regarding deficiencies in the bank's policy relating to mechanisms for granting loans and the lack of guarantees. Later the GPC announced that the Shift to Production Fund was under high risk and too close to bankruptcy.

These are just a sample of the many tragic stories which have left significant marks in the researcher's memory. Despite all of these stories, the researcher has a strong feeling

that the situation in Libya is changing and the right people will be appointed for the right positions, particularly with the increased power of Saif-al-Islam, Quddafi's son and his interventions to develop Libya's economy. Therefore, the researcher is well-placed to exploit his experience, efforts and ideas developed in this study to contribute to the development of Libya as internationally-competitive tourism destination, moreover, the researcher will be nominated as the head of the National Planning Council in the West Mountain province, where there will be opportunities to implement the findings of this study.

The UN sanctions were lifted in 2003, when the country came back to the international community and resumed its relationships with the West. For this reason, the field of tourism seems to be a potential and attractive industry, particularly when considered from the point of view of Libya's neighbouring countries, Tunisia and Egypt. Therefore, the researcher felt the importance of developing and marketing Libya's tourism product. Thus, this study was very timely and will contribute to the development of Libya as a competitive tourism destination.

1.3 The research problem

The Libyan economy relies mainly upon non-renewable oil resources, which makes a total contribution of about 95% of export earnings (CIA, 2009). Since the early years of Libyan revolution, Libya has been hoping to diversify its national income sources and reduce its dependency on the oil industry by investing in profitable industries, such as agriculture, tourism, fisheries, mining and natural gas (Clough, 2008). However, to date there are no signs of any progress have been achieved in this regard. Qudaffi argues that

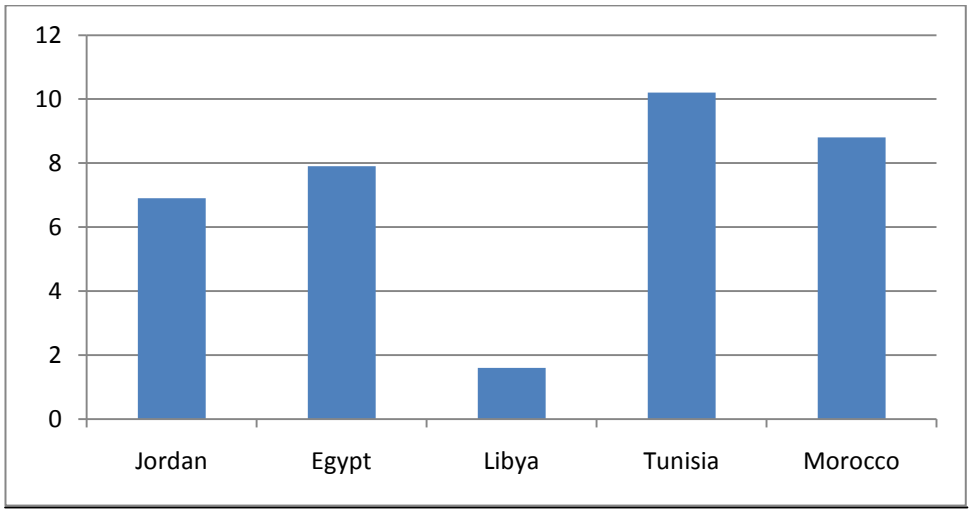
the country is overly dependent on oil and aims to stop the country relying exclusively on imports. He maintains: "*We sell only oil and consume everything'* (Goncalves, 2006, online). The Libyan General Secretary of the GBTTI has also declared that in a meeting with United World (an independent, international media communication agency based in the USA):

> *I believe in the tourism sector more so than in the oil sector here. Oil is a non-renewable resource and it will not last forever. Tourism can last for centuries.*
>
> (United World, 2006, p.1)

Libya realised the importance of tourism at the beginning of the nineties. However, since it was under UN sanctions until 2003, with no inbound and outbound flights to Libya, it could be argued that Libya actually entered the MENA tourism market in 2003 when the sanctions were lifted. 2003 was a tough time for Libya and the country faced many problems, such as oil price fluctuations, corruption, high unemployment rate, low prosperity for ordinary people, image problems and weak private sector contributions.

Libya's travel and tourism industry contributed 1.6% to Libyan GDP in 2004, compared with 10.2% in Tunisia, 7.9% in Egypt and 8.8% in Morocco (see Figure 1.4). It also sustained 110,900 jobs in comparison with 576,200 in Tunisia and 3,084,800 in Egypt (UNWTO, 2005). However, jobs in the travel and tourism industry accounted for just 2.2% of total employment in 2004, compared to 10% in Tunisia, 7% in Egypt, and 8% in Morocco. These statistics demonstrate the weak contribution of the Libyan travel and tourism industry compared to its competitors in the MENA region (World Travel and Tourism Council WTTC, 2005).

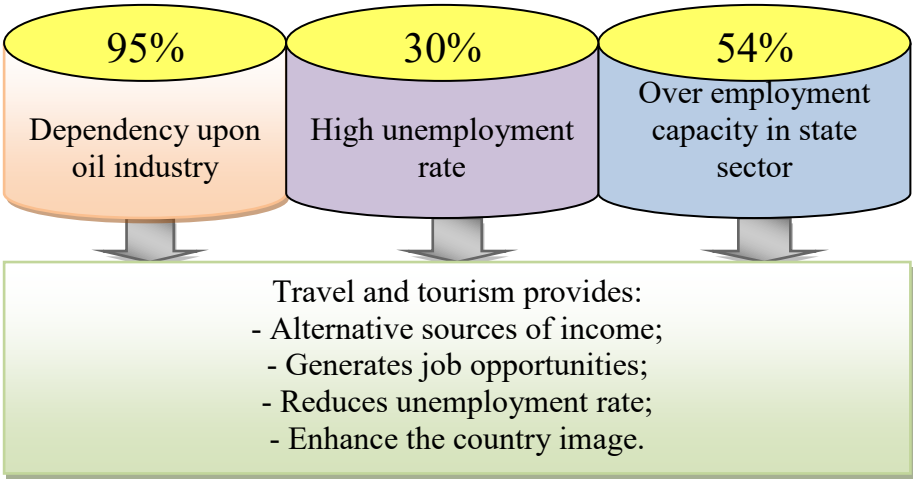
Figure 1.4: Travel and tourism contributions to GDP in the MENA



Source: UNTWO (2004)

Unemployment is one of the major concerns worldwide, with the unemployment rates estimated to reach 8.5% in the Euro-zone for 2009 (UNWTO, 2008). Despite economic reforms, the Libyan unemployment rate remains high, at around 30% of the total population (CIA, 2009). In addition, the state sector has suffered from over-employment since the beginning of the seventies, this amounting to over 54% of the total workforce (Ghariany, 2005). The Secretary of the General People's Committee (GPC) claims that they are reducing the number of state employees, which, according to 2005 statistics accounted for 850,000 of the employees. He also made clear that unemployment is the most pressing problem that concerns Libya (Middle East Transparency Report, 2005). The GPC for Manpower and Training (previously) attempted to reduce the over-capacity of employment in the state sector, but all solutions put forward so far have been unpractical. Clearly, therefore, the travel and tourism industry can create job opportunities to reduce the high unemployment rate, and shift a number of employees from the state to the private sector as illustrated in Figure 1.5.

Figure 1.5: Potential role of travel and tourism industry for Libya



According to the UK International Passenger Survey (2004) the number of British tourists who visited Egypt and Tunisia in 2004 was about 345,000 and 280,000 respectively. However, the number of British tourists who visited Libya in 2004 was about 1,367 tourists. The Association of British Travel Agents (ABTA) stated that:

> *Until recently there was almost no mainstream tourism from Britain to Libya.*
>
> (Coughlan, 2004, online)

According to Dany (2004), for most people worldwide, Libya is a place associated with terrorism, yet the Libyan Tourism Minister is not aware that his country continues to have an image problem (Thomson, 2004). In 2006, Mr Amar Eltayef, the secretary of Libya's GBTTI claimed that:

> *The American media is responsible for portraying a false image of Libya to its people. Over the past 25 years, it has been hammered into the American consciousness that Libya is a terrorist nation.*
>
> (United World, 2006, online)

While Libya had ambitions to attract a million tourists in 2008, as Mr Eltayef stated in a meeting in London in 2004, that it also aspired to increase its market share in the MENA market. Such hopes cannot be achieved without the integration of all Libyan stakeholder efforts with the Libyan Government taking the lead by putting into place a phased plan. Obviously, Libya's tourism industry faces critical challenges, which make developing tourism unachievable unless a scientific approach is adopted and integrated into tourism stakeholder efforts. Whilst, Libya is an emerging tourism destination with potential tourism attractions, obviously, Libya missing the experience of selling its tourism products, particularly with an increase competition in the MENA market. Thus, this study provides an extensive analysis for Libya' tourism market and focuses upon how Libya could market itself as internationally-competitive tourism destination.

1.4 Research questions

The study attempts to answer the following questions:

Q1: How can Libya become a significant, sustainable and competitive tourist destination?

Q2: What is the Libyan image in the UK market compared to the image of its competitors in the MENA region?

Q3: What are the challenges that face the Libyan tourism industry, particularly after the lifting of the UN sanctions in 2003?

Q4: To what extent does Libya have the ability to compete in the MENA tourism market?

1.5 Research agenda

This study attempts to identify Libya's image in the UK, making comparisons with its main competitors in the MENA region, namely Jordan, Egypt, Tunisia and Morocco which have common characteristics; similar geography, history, culture, language, religion and climate. However, UAE is excluded as it is a unique case. This objective is achieved by focus group interviews conducted with British non-visitors to Libya.

The study then analyses the Libyan tourism industry through employing a comprehensive case study methodology. The required data is collected by semi-structured interviews, document analysis, audiovisual materials and participant observation, while the five sources of information were: government officials, tour operators, hotel managers, tourists and local residents.

1.6 Aims and objectives

1.6.1 Research aims

The aim of this study is to develop an enhanced understanding of Libya's tourism potential and to develop a Sustainable Competitive Destination Model (SCDM) which can be used to inform Libya's development as an internationally-competitive tourism destination, investigate the challenges of Libya's tourism industry after the lifting the (UN) sanctions, particularly in relation to Libya's image in the key markets. Also a SWOT analysis will be made of the Libyan tourism industry to identify the strengths, weaknesses, opportunities and threats that face the Libyan tourism industry. Recommendations for developing Libya's tourism industry will are be made.

1.6.2 Specific objectives

1- To undertake a critical review of relevant literature on tourism development with a special focus on destination image and sustainable tourism competitiveness.

2- To develop a sustainable competitive destination model which can be applied to Libya to promote destination competitiveness.

3- To explore Libya's image in the UK as a tourism destination (in comparison to its competitors in the MENA countries, namely Jordan, Egypt, Tunisia, Morocco).

4- To analyse Libya's tourism industry elements including: the accessibility of the destination, its comparative advantage, supporting resources, local communities and destination planning and management.

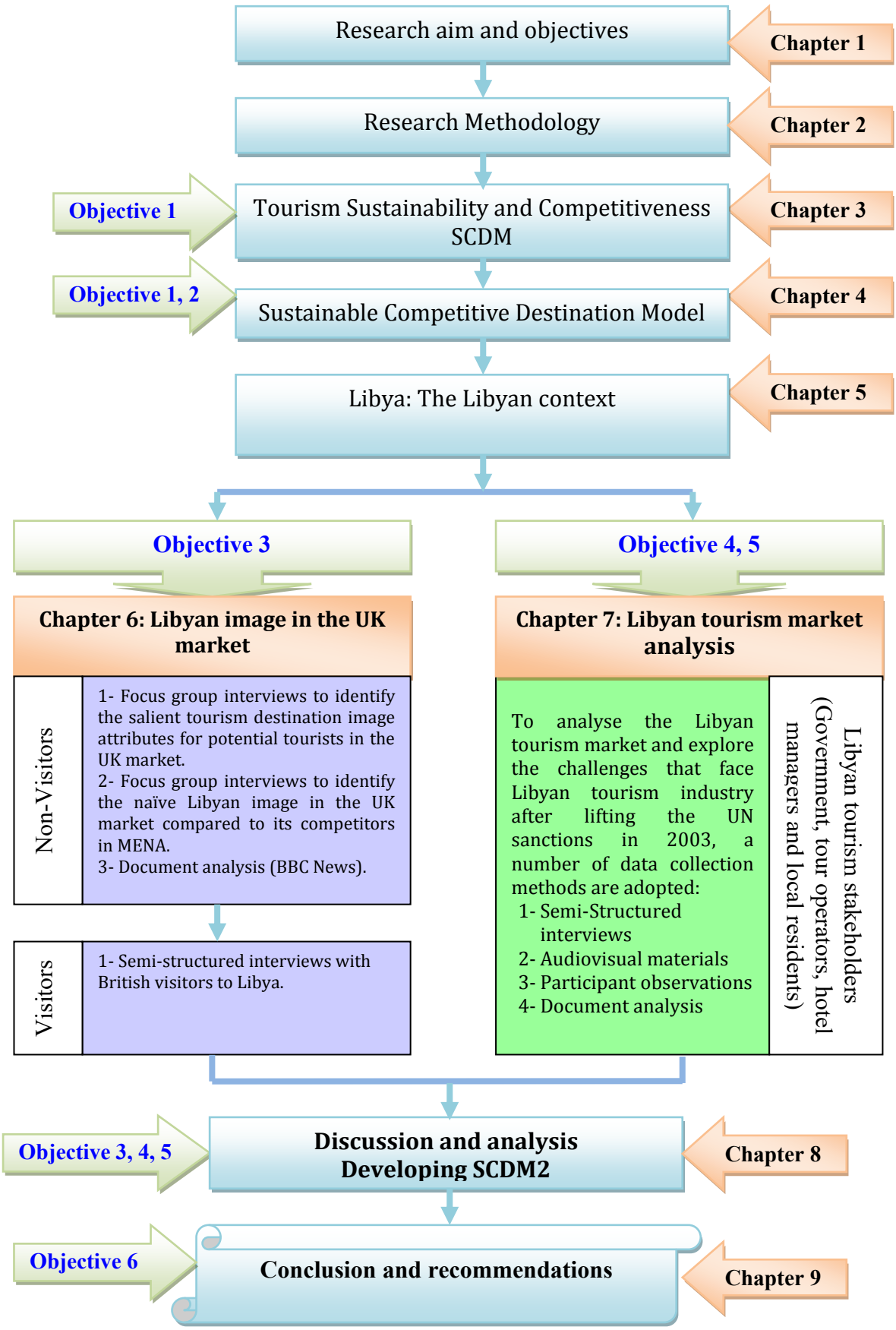
5- To determine the challenges of Libya's tourism industry after the lifting of the UN sanctions in 2003 and to identify Libya's key tourism assets using SWOT analysis thereby differentiating Libya as a competitive international tourism destination.

6- To make recommendations for developing Libya as a sustainable competitive tourism destination.

1.7 Research methodology and design

A research design is a logical process which establishes a link between the data to be collected and the conclusion and results. It should also answer the initial questions of the study (Yin, 2003). Figure 1.6 explains the research design. The research process is divided into stages, presented into a logical order. The study consists of nine chapters: chapters one and two establish the basis of the project, while the research objectives are achieved in chapters' three to nine.

Figure 1.6: Thesis overview and research design



1.8 Overview of thesis

This thesis focuses on tourism destination marketing, concentrating specifically on developing Libya as a sustainable competitive tourism destination. This broad subject contains interesting areas of research, such as destination image, destination accessibility, destination tourism products, destination planning and management, service quality and the local communities' involvement in the tourism development. As previously mentioned, the thesis is composed of nine chapters.

The first chapter is the introduction, and has provided a brief background to the global importance of tourism, reviewed Libya's economic and tourism industries and explained the research problem, the research aims and the objectives.

The second chapter highlights the epistemological and theoretical perspectives of the research and presents a justification for the research methodology. The nature of the research and its objectives influenced the research approach to focus upon quality of required data. To gain rich information, this study employed five data collection methods (participant observation, focus group interviews, semi-structured interviews, document analysis, and audiovisual materials) and five sources of information (government officials, tour operators, hotel managers, tourists, and local residents).

Chapter three provides an extensive and critical review of previous studies that relate to the research subject, giving the background to the subject of sustainable tourism and competiveness. It reviews the impacts of tourism and critically discusses the concept of sustainable development as well as its importance, principles and objectives. Following

this, there is a consideration of the destination competitiveness, including the dimensions of the destination's competitive advantage and destination's generic competitive strategy. Furthermore, chapter three presents destination competitive models, including Integrated Quality Management (IQM) and the European Federation Quality Model (EFQM).

Chapter four develops a SCDM. The SCDM was built through four main stages, began with tourism system, which explains the relationship between tourism destination and tourist markets. Second stage considers tourism product, where third stage focuses upon destination planning and management final stage combines all tourism elements in a systematic model. The SCDM sheds the light on the destination image as a crucial factor in tourist markets (demand side). Tourism destination as a supply side provides tourists with tourism products and services (comparative advantage and supporting resources and facilities) also has responsibility for planning and managing the destination. The SCDM also points out to the significant role of local communities in tourism development, and takes into account the impacts of the global environment to gain sustainable destination competitiveness.

The fifth chapter provides an extensive overview of the Libyan tourism industry as well as the country in general. This chapter also demonstrates the structure of sustainable competitive destination model elements, starting with general information about Libya and highlighting the Libyan image abroad particularly in Western countries. The chapter also provides information on Libyan tourism products, including the natural resource heritage, cultural and supporting resources. In addition to this, there is an explanation of

how the tourism sector and service quality are managed in Libya. An attempt is also made to outline the role of local communities in the tourism industry. Finally the chapter analyses the impacts of global environment on Libya's tourism industry.

Chapter six examines the UK market as a potential tourist target market (demand side) for Libya. It discusses the relationship between Libya and the UK and reviews the main elements that influence the Libyan image in the UK, such as the media, tour operators, branding and the use of word-of-mouth communication. This chapter further identifies the most important destination image attributes for potential British tourists, exploring the Libyan image as perceived by non-visitors and actual visitors and comparing this with the image of competitors in the MENA region.

Chapter seven considers the elements of the SCDM, commencing with Libya's destination accessibility and presenting the Libyan tourism products (natural resources, heritage and culture) with their supporting resources including accommodation, transportation, and infrastructure facilities. It outlines the local communities' involvement in the development of tourism and discusses in detail how Libya has managed its tourism industry. In this section there is also a critical analysis of the National Tourism Development Plan (NTDP) for tourism in Libya. Finally, there is a review of the quality of the tourism services and the major impacts this will have on external environments.

Chapter eight discusses and analyses the major findings of the research and links it with the literature review. This chapter also critically analyses the Libyan tourism market

using a SWOT analysis, in order to identify the key assets of Libyan tourism and to determine their value when differentiating Libya from its MENA competitors. It also develops a SCDM2, which provides a scientific approach for developing Libya as internationally-competitive tourism destination.

Finally, chapter nine concludes the study and describes the major findings in relation to developing Libya as a sustainable, internationally-competitive tourism destination. In addition, recommendations for developing Libya's tourism sector are also made. The research contributions to the theory and practice are then presented as well as the research limitations, the opportunities for future research and personal reflections.

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Chapter 2: Research Methodology

2.1 Introduction

Tourism is a relatively recent field of study. Moreover, it seems there is no academic agreement on how to conduct tourism studies as it depends on the researcher‟s position and their perspective (Page, 2005). This is exacerbated by the fact that the social sciences differ from their physical or natural counterparts as they deal with people and their social behaviour which is inevitably less predictable than non-human phenomena (Veal, 2006). Reliability and validity are core concerns of social science research; hence researchers are very keen to adopt appropriate systematic research methodologies and methods. However, researchers have to make crucial decisions when they decide to carry out research including during the process of formulating the research approach, in data collection methods, ensuring representative sampling and availability to data access, which ultimately, are able to answer the research questions and meet the research objectives. All these aspects should be addressed carefully during the research design stage and prior to carrying out the research.

> *The design of any study begins with the selection of a topic and a research methodology. These initial decisions reflect assumptions about the social world, how science should be conducted, and what constitutes legitimate problems, solutions, and criteria of "proof." Different approaches to research encompass both theory and method.*
>
> (Dobbin and Gatowski, 1999, p.41)

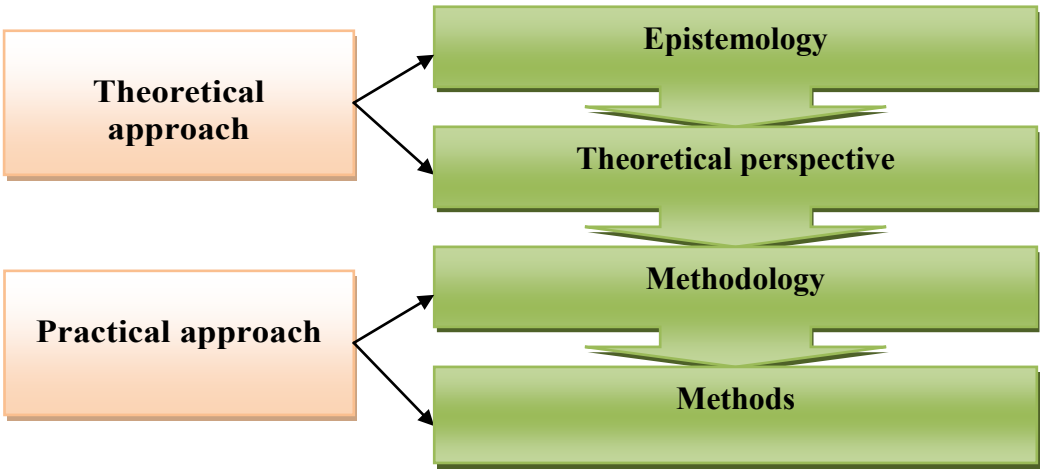
The research methodology dictates how the researcher conducts the study; however, according to Silverman (2001) all methodologies are never true or false but only more or less useful. Thus, some methodologies and methods are more appropriate than others

for certain demands of a piece of research. This chapter presents and discusses the research methodology used in this study, justifies the chosen methods and places them in the context of research methodologies used in the field of tourism.

2.2 Research approach

Crotty (1998) suggests that there are four different aspects that any research needs to consider. These are epistemology, theoretical perspective, methodology and methods (Figure 2.1). In the following sections these four aspects are discussed in the context of this research enquiry.

Figure 2.1: Research Approach



Source: Crotty (1998)

Crotty"s classification is relevant for this study because initially it approaches research from a wider perspective, before narrowing down the process through a logical sequencing of events. Therefore, this chapter discusses the theoretical approach of

epistemology and the theoretical perspective. The practical approach includes the methodology and the methods of data collection and analysis.

Crotty (1998) asks four questions, which are the basic elements of any research process, and which the researcher should take into consideration when he or she begins a project. The first two questions are related to the theoretical approach.

- What theoretical perspective lies behind the methodology in question?
- What epistemology informs this theoretical perspective?
- What methods do we propose to use?
- What methodology governs our choice and use of methods?

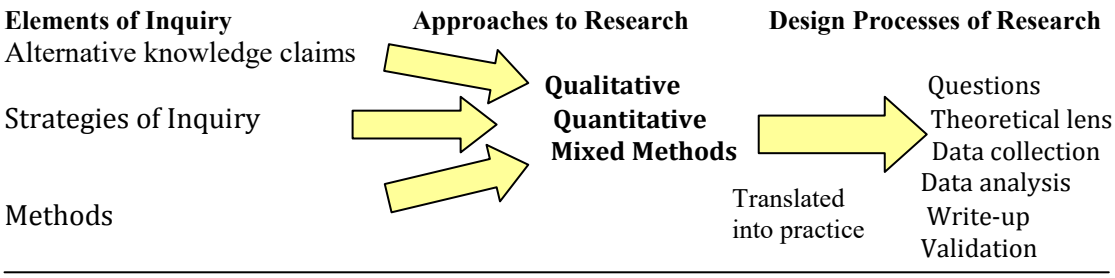
2.3 Theoretical approach

Creswell (2003) conceptualised a model which considers three questions related to the research design as shown in Figure 2.2.

1- The knowledge claims being made by the researcher (including the theoretical perspective);
2- The strategies of inquiry that will inform the procedures;
3- The methods of data collection and analysis.

Creswell (2003) also added that the knowledge claims as well as the strategies and the methods used all contribute to a research approach, which can be considered as qualitative, quantitative or a combination of both.

Figure 2.2: Knowledge claims and strategies of inquiry



Source: Creswell (2003, p.5)

2.3.1 Research epistemology

Epistemology is a research philosophy concerned with the theory of knowledge in terms of its methods, validity and gaining understanding of social reality (Grix, 2002). DeRose (2005) asserts that epistemology is the theory of knowledge and added that it is the branch of philosophy that deals with questions concerning the nature, scope, and sources of knowledge.

However, the term epistemology was defined in the Dictionary of Philosophy, created by Dagobert Runes, (1942) as a branch of philosophy which investigates the origin, structure, methods and validity of knowledge. The term "epistemology" itself appears to have been used for the first time by the Scottish philosopher James Frederick Ferrier, Institute of Metaphysics (1854) who distinguished between two branches of philosophy, namely epistemology and ontology (Dagobert, 1942).

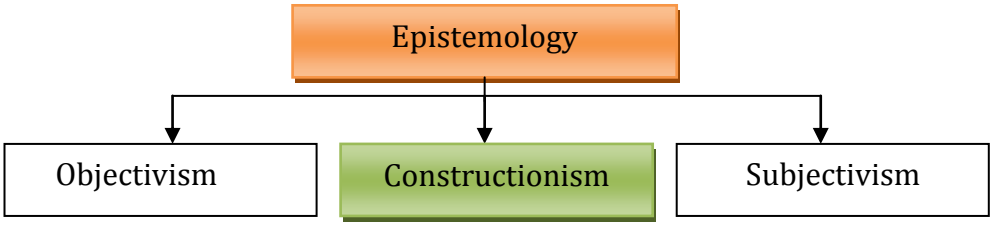
The term epistemology is based on the Greek word “episteme” which means (knowledge or science) and logos which means (reason) (Grix, 2002). According to Plato knowledge is true belief that has been “given an account of” meaning explained or defined in some way (Dagobert, 1942). Crotty (1998) simplifies this when he defines

epistemology as the way of understanding how we know what we know. Tribe (1997, p.639) claims that:

> *Epistemology's essential concern is the analysis of the validity of a claim to know something.*

According to Crotty (1998), epistemology has three categories; objectivism, constructionism and subjectivism (Figure 2.3).

Figure 2.3: Epistemology categories



Source: Crotty (1998, p.5)

The term objectivism was developed by Ayn Rand, the Russian writer in 1962, in her introduction to objectivist epistemology and was one of her significant contributions to the field (Ayn Rand Institute, 2008). Objectivists believe that:

> *Meaningful reality exists as such a part from the operation of any consciousness.*
>
> (Crotty, 1998, p.8)

However, Crotty (1998) argues that subjectivists claim that meaning or reality cannot be explored by human beings.

> *Constructionism is the view that all knowledge, and therefore all meaningful reality as such, is contingent upon human practices, being constructed in and out of interaction between human beings and their world, and developed and transmitted within an essentially social context.*
>
> (Crotty, 1998, p.42)

In this regard, the researcher has built his knowledge according to other human being relationship, therefore, the truth comes from what others telling, also the findings and results of this study were based upon the Libyan stakeholders" opinions. Thus, it must be grounded in real participation within the observed phenomenon. While this study the research objectives were to develop a sustainable competitive destination model for Libya, and critically analyse the Libyan tourism market in order to make recommendations for future development regarding the industry, thus the research epistemology is constructivist rather than objectivist or subjectivist.

2.3.2 Theoretical perspective

Crotty (1998) explains that the theoretical perspective describes the philosophical approach to information gained from the methodology. This creates a context for the process and provides grounding for its logic and criteria. In other words, it is the way of looking at the world and making sense of it.

> *Phenomenology aims to grasp how we come to interpret our own and others action as meaningful and to reconstruct the genesis of the objective communication of individuals in the social life-world.*
> (Outhwaite, 1975 cited in Denzin and Lincoln, 2000, p.19)

Phenomenology is about interpreting human action into meaningful behaviour, as well as reflecting human experience and social activity. I would argue that phenomena can be either individual or social when a group or whole society act or adopt particular behaviours and attitudes.

> *Phenomenology is the study of lived, human phenomena within the everyday social contexts in witch the phenomena occur from the perspective of those who experience them. Phenomena comprise any thing that human beings live/experience.*
> (Tithen and Hobson, 2007, p.121)

According to Tesch (1994 cited in Gray, 2004, p.21), phenomenological research is a descriptive and interpretive approach and focuses on culture and the human experience of the life-world. Gray (2004) added that phenomenological research emphasises the use of the inductive approach and produces large amounts of data that describe people‟s experiences and perspectives in natural settings.

Neuman (2000) believes that interpretive research is concerned with the study of a particular phenomenon in its natural setting and seeks to interpret the phenomenon through the meanings of people amongst themselves. Phenomenology is one of the categories of interpretivism (Crotty, 1998), and is used for unstructured methods of data collection (Gray, 2004). In order to achieve the research objectives and gather sufficient answers to the research questions, the interpretive and phenomenological approach were chosen as they were seen as the most appropriate theoretical perspective from which to approach an exploration of Libya‟s image in the UK market, and analyse the Libyan tourism marketing environment

In addition, the perspectives of potential UK tourists and Libyan tourism stakeholders are shaped by their life experiences, knowledge, social relationships and the socio-cultural environment. This study is based on an analysis of these perspectives, behaviours, and attitudes toward tourism development.

2.3.3 Research types

According to Gill and Johnson (2002) there are different research types, which can be classified according to:

- The purpose of the research or the reason beyond conducting the research (exploratory, descriptive, analytical or predictive research).
- The process of the research or the way of collecting and analysing the data (qualitative or quantitative research).
- The logic of the research or whether the research is moving from the general to the specific or vice versa (deductive or inductive research).
- The outcome of the research or whether the research is attempting to solve a particular problem or make a general contribution to knowledge (applied or theoretical).

A research approach is a broad process under which the researcher is able to conduct research and produce results. The common research types are qualitative and quantitative. This classification defines how the data are processed and analysed in the research approach.

2.3.3.1 Quantitative and qualitative research

Creswell (2003) argues that there are three research types; quantitative; qualitative and mixed methods. According to Cresswell (1994), a qualitative study can be defined as an investigative process of understanding a particular issue or problem which comes in many forms, such as building complex, holistic pictures formed with words, reporting detailed views of informants, and importantly conducting these in a natural setting. Creswell (2003) added that quantitative methods are a traditional approach taken in the social science and humanities. In quantitative research, the phenomena or a problem is investigated through understanding the factors or variables influencing an outcome. A

mixed methods approach can use either qualitative or quantitative approaches or in combination with each other.

Morgan and Smircich (1980) point out that qualitative research is an approach rather than a particular set of techniques, and its appropriateness derives from the nature of the social phenomena that is being explored in the study.

> *Qualitative inquiry employs different knowledge claims, strategies of inquiry, and methods of data collection and analysis. Although the processes are similar, qualitative procedures rely on text and image data, have unique steps in data analysis and draw on diverse strategies of inquiry.*
>
> (Creswell, 2003, p.179)

Creswell (1994) states that qualitative researchers focus primarily on the research process, rather than the outcomes; they are more interested in the meaning of how people make sense of their lives and experiences. Denzin and Lincoln (2005) acknowledge that qualitative research is difficult to define clearly. They argue that:

> *The word qualitative implies an emphasis on the qualities of entities and on processes and meanings that are not experimentally examined or measured (if measured at all) in terms of quantity, amount, intensity, or frequency.*
>
> (Denzin and Lincoln, 2005, p. 10)

Holliday (2002) notes that qualitative research is increasingly used in both academic and professional areas: Silverman (2001) distinguishes between quantitative and qualitative, saying qualitative data is soft, flexible, subjective, political, used in case studies, speculative and grounded theory. In contrast, quantitative data is hard, fixed, objective, value-free, used in surveys, hypothesis testing, and abstract.

> *The great contributions of qualitative research are the culturally specific and contextually rich data it produces.*
>
> (Mack, *et al*., 2005, p.vi)

Quantitative research involves statistical analysis, which relies on numerical evidence to draw conclusions or to test hypotheses, whilst qualitative research is generally not concerned with numbers, but with gathering rich data from a small number of people (Veal, 2006). Miles and Weitzman (1994) argue that both qualitative and quantitative research are now increasingly converging, especially through using computer assisted software that allows for the analysis of qualitative data.

Corbetta (2003) asserts that quantitative research makes ample use of mathematical and statistical tools, together with a whole array of tables, graphs, statistical tests, etc, as well as the full set of technological equipment (computers, files, data banks, software, etc). For qualitative analysis, no statistical or mathematical tests are needed and if any are undertaken they are limited to the organisation of empirical material.

The decision to adopt a qualitative or quantitative research depends, in fact, on what the researcher is trying to find out (Silverman, 2006). Strauss and Corbin (1998) believe there are number of reasons for conducting qualitative research, the main ones being the preferences and background of the researcher and the nature of the research. Qualitative research still gains rich and valuable information if the samples are not biased; it also gives an opportunity to explore new ideas that relate to the research question. It also answers questions of the „how" and „why" which cannot be obtained by a quantitative approach. However, according to Creswell (2003) there are three factors that influence the choice of a particular research approach: the research problem; personal experience of research; the audience(s).

In this study, the research questions and objectives thus dictated the nature of the research approach and a qualitative research approach was adopted to explore the following:

1- Perceptions of UK potential visitors which could not be captured through a quantitative approach, as the researcher had little prior knowledge of how English, Scottish, and Welsh people perceived Libya.
2- Destination image attributes are more easily gathered from potential visitors rather than using destination image attributes that are mentioned in the literature. While people‟s needs, wants and preferences are changeable over the time, by using this approach in the study new attributes emerged, for example safety and security emerged as priorities for tourists in relation to travel to Libya.
3- Analysing the Libyan tourism market and conducting SWOT analysis is more reliable by adopting the qualitative approach where markets are often associated with uncertainty.
4- Tourism is still a new industry in Libya and faces many challenges, particularly after the lifting of UN sanctions in 2002. Thus, with open questions and in-depth discussion, interviewees have an opportunity to raise these challenges and its causes.
5- Residents and tourists‟ experiences and their narratives are an important factor that helps to support the findings of the study. A quantitative approach does not provide space for stories and lived experience.

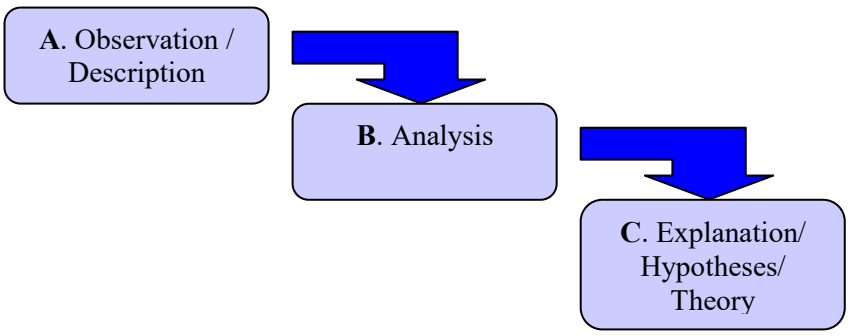
These reasons were enough to drive and encourage the researcher to employ a qualitative research approach rather than a quantitative one as it was expected to gain rich and interesting data and information. In this context, there is another school of research methodology, and a number of researchers have adopted this approach.

2.3.3.2 Inductive and deductive research

This school looks at research approaches from a different angle; they divide research types into two categories: inductive and deductive (Gill, and Johnson, 2002; Veal, 2006 and Saunders, Lewis and Thornhill, 2007), as illustrated in Figures 2.4 and 2.5. The inductive researcher begins at point A, observation/description, then proceeds to point B, analysis, and arrives at point C, explanation and hypotheses or the production of a theory. Inductive research is the reverse of a deductive approach.

> *A conceptual and theoretical structure is developed prior to empirical research; theory is the outcome of induction.*
>
> (Gill and Johnson, 2002, p.40)

Figure 2.4: Inductive research processes

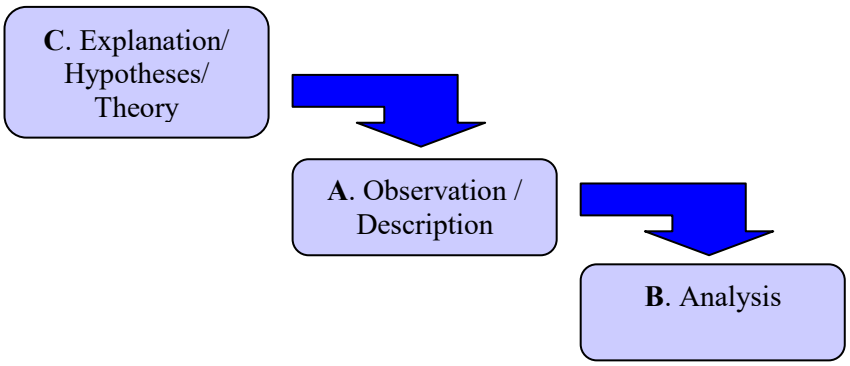


Source: William *et al.* (1982 cited in Veal, 2006, p.21)

The deductive style begins at point C, with a theory or hypothesis and proceeds to point A, observation/description, gathering data to test the hypothesis, and then proceeds to point B, analysis, to test the hypothesis against the data.

> *A deductive research methods entails the development of a conceptual and theoretical structure prior to its testing through empirical observation.*
>
> (Gill, and Johnson, 2002, p.34)

Figure 2.5: Deductive research processes



Source: William *et al.* (1982 cited in Veal, 2006, p.22)

According to the above classification, this study takes an inductive research perspective, starting at point A, where the researcher attempted to explore Libya"s tourism image, challenges and opportunities (by adopting appropriate data collection methods) before proceeding to point B for an analyses of the data, and then continuing to the end. At this point, an explanation for the phenomena was established and the SCDM was developed with significant recommendations.

2.3.3.3 Exploratory, explanatory and descriptive research

The research type adopted therefore depends on the nature of the research itself and research approaches. In terms of research purposes, it can be classified into several

general categories of research: exploratory, descriptive and explanatory (Robson, 1993), exploratory, descriptive or causal (Kumar, 1999), descriptive; explanatory, and evaluative (Veal, 2006), exploratory, descriptive, explanatory, and evaluative (Schutt, 2006).

An exploratory study seeks to find out what is happening and assess the phenomenon in a new light. In this case, the researcher is unsure of the precise nature of the problem. The explanatory study, on the other hand attempts to identify the relationship between variables (Saunders *et al.,* 2007).

According to Hedrick *et al.* (1993) cited in Gray (2004, p.32):

> *The purpose of a descriptive study is to provide a picture of a phenomenon as it naturally occurs.*

Notably, Saunders *et al.* (2007) indicate that there are three principal methods of carrying out exploratory research:

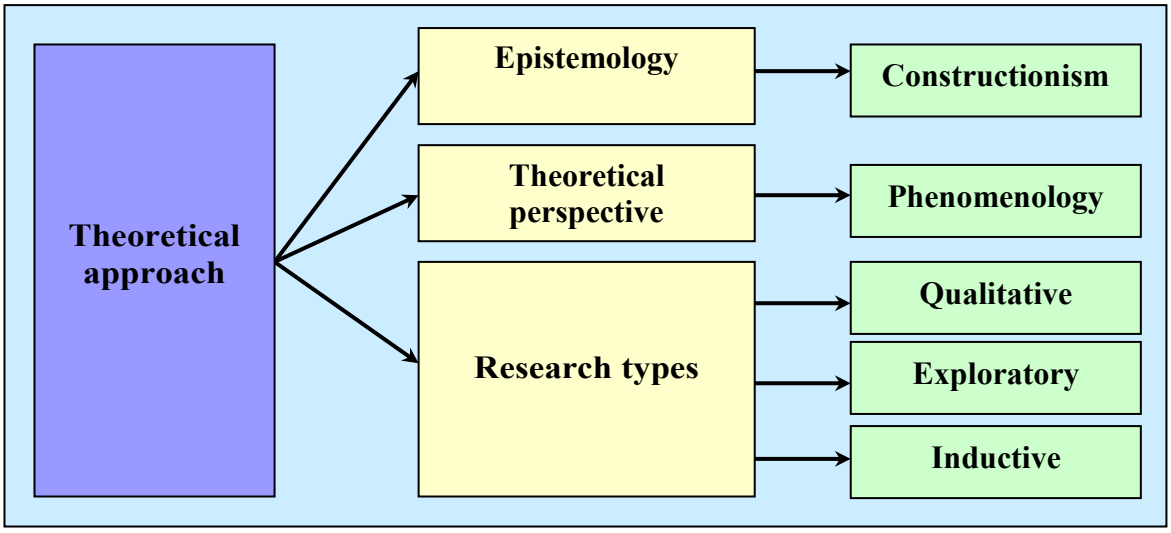
- A research of the literature;
- Interviewing "experts" in the subject;
- Conducting focus group interviews.

According to the research purpose classification, this study is exploratory. It aims to explore the Libyan image in the UK market compared with its competitors in the MENA region. It also aims to determine the challenges of Libya‟s tourism industry, after lifting UN sanctions in 2002 and how Libya can differentiate itself as an internationally-competitive tourism destination.

The researcher realised that scholars classified research types into: exploratory, explanatory, descriptive and evaluative research. There is another type of research which has not been mentioned by the scholars, which is development research. Development research emerges when the phenomena are known and the relationships of its variables are determined.

The above section has reviewed the theoretical approach and justification as illustrated in Figure 2.6. The following section discusses the practical approach, which includes research methodology and methods. A case study is used as a research methodology and a wide range of data collection methods are used to explore Libyan tourism"s ambitions and challenges. This picture is captured through a combination of appropriate methods, participant observation, focus group interviews, semi-structured interviews, document analysis, and audiovisual materials.

Figure 2.6: Research Theoretical approach justification



2.4 Practical approach

2.4.1 Research methodology

Research methodology is a strategy, plan, process or design linking the theoretical approach and the chosen research methods (Crotty, 1998). In this context, Saunders *et al.* (2007) say there are a number of research strategies which can be employed for the research approach, which are: experiment, survey, case study, action research, grounded theory, ethnography and archival research. They add that no research strategy is inherently superior or inferior to any other; the appropriate strategy enables the researcher to answer the research questions and meet the research objectives. This research will comprise a case study as a research methodology to investigate tourism industry in Libya in detail and discuss the issues from different angles.

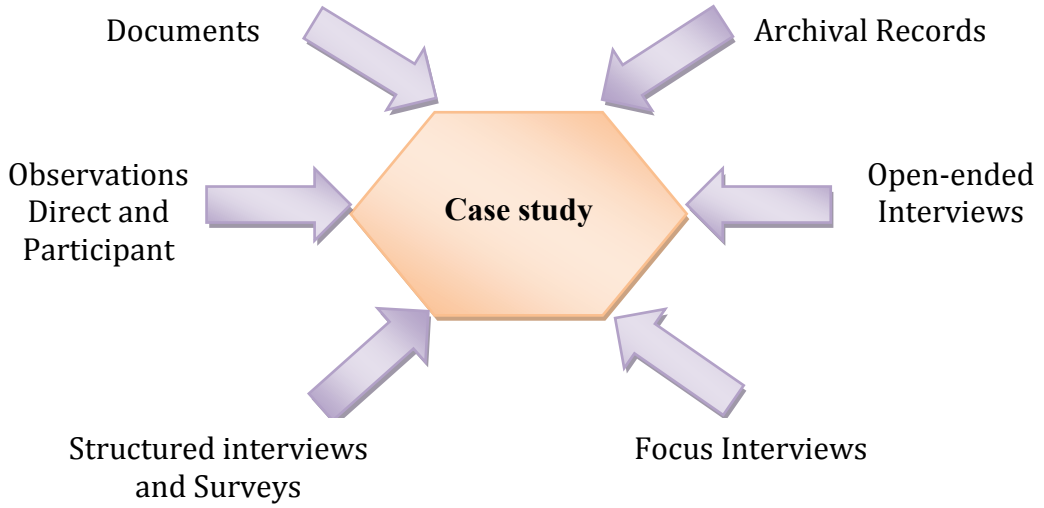
2.4.1.1 Case study

Yin (1981, 1994) argues that case study is a strategy used for carrying out research through empirical investigation of a phenomenon within its real life context by using multiple sources of evidence. Yin (2003) emphasises that the case study is the method of choice when the phenomenon under study is not readily distinguishable from its context. Case studies can be based on single or multiple case studies, however, the case study approach can be exploratory, descriptive, or explanatory (causal). Case studies can be either single or multiple case designs. Single cases are used to confirm or challenge a theory, or to represent a unique or extreme case (Yin, 1994).

Feagin, Orum and Sjoberg (1991) suggest that case study is an ideal methodology when a holistic, in-depth investigation is needed. Again Yin (2003) notes that data for case

studies can be collected from many sources of evidence, the most common sources being: documentation; archival records; interviews; direct observation; participant observation; physical artefacts, as described in Figure 2.7. A good case study employs as many sources as possible.

Figure 2.7: Sources of evidence in case study



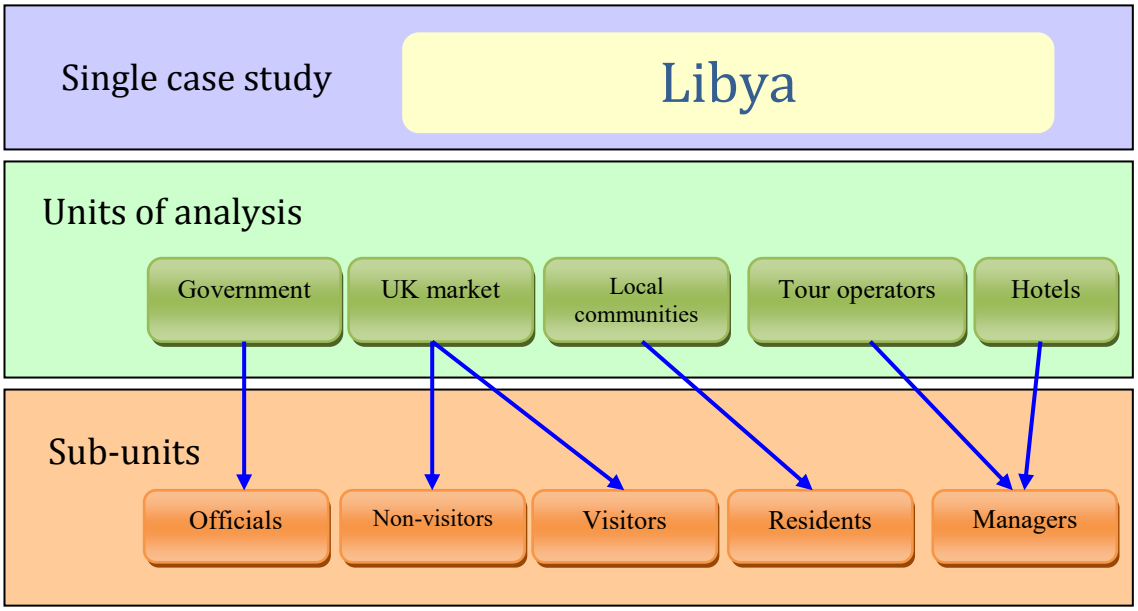
Source: Yin (2003)

Yin (2003) also suggests that documentary evidence is sometimes essential to a case study topic. However, documentary information can take many forms and should be the object of explicit data collection plans. According to Kohn (1997) many researchers believe that in qualitative research it is difficult to adopt case study as a methodology. However, those researchers are working primarily in the health science field of social science, whereas in tourism studies, adopting case study methodology is more applicable and relevant. Kohn (1997, p.3) added that there are three main purposes for using case study:

1- To explore new areas and issues where little theory is available or measurement is unclear.
2- To describe a process or effects of an event or an intervention, especially when such events affect many different parties.
3- To explain a complex phenomenon.

This study is an embedded single case as described in Yin"s classification, which considers Libya as a tourism destination. The case study consists of five units of analysis which are the government, tour operators, hotels, UK market and local market. These units have sub-units which are officials, managers, tourists and local residents (see Figure 2.8 below).

Figure 2.8: An embedded single – case design



2.4.2 Research methods

Crotty (1998, p.3) defines research methods as:

> *The techniques or procedures used together to analyse data related to some research question or hypothesis.*

Research methods are thus certain activities and procedures used when considering, gathering and analysing the required data for the research. Jankowicz (2000) believes that the research method can be defined as the systematic and orderly approach taken towards the collection and analysis of raw data so that usable information can be obtained from that data. A research method is about how the researcher conducts the study and obtains the required data.

2.4.2.1 Data collection methods

According to Veal (1997) there are two types of data, primary data and secondary data. Primary data is new data collected specifically for the research study, and may be collected by a range of methods. Secondary data is data which already exists and was collected for another purpose. This data can be used as part of the current research as a second source of data. There are several methods of qualitative primary data collection, including interviewing; direct observation; the analysis of artefacts, documents, and records; the use of visual materials; and personal experience (Denzin and Lincoln, 2005). Creswell (2003, p.187) lists qualitative data collection methods and provides a brief description of these methods as shown in table 2.1.

Table 2.1: Qualitative data collection types, options and advantages

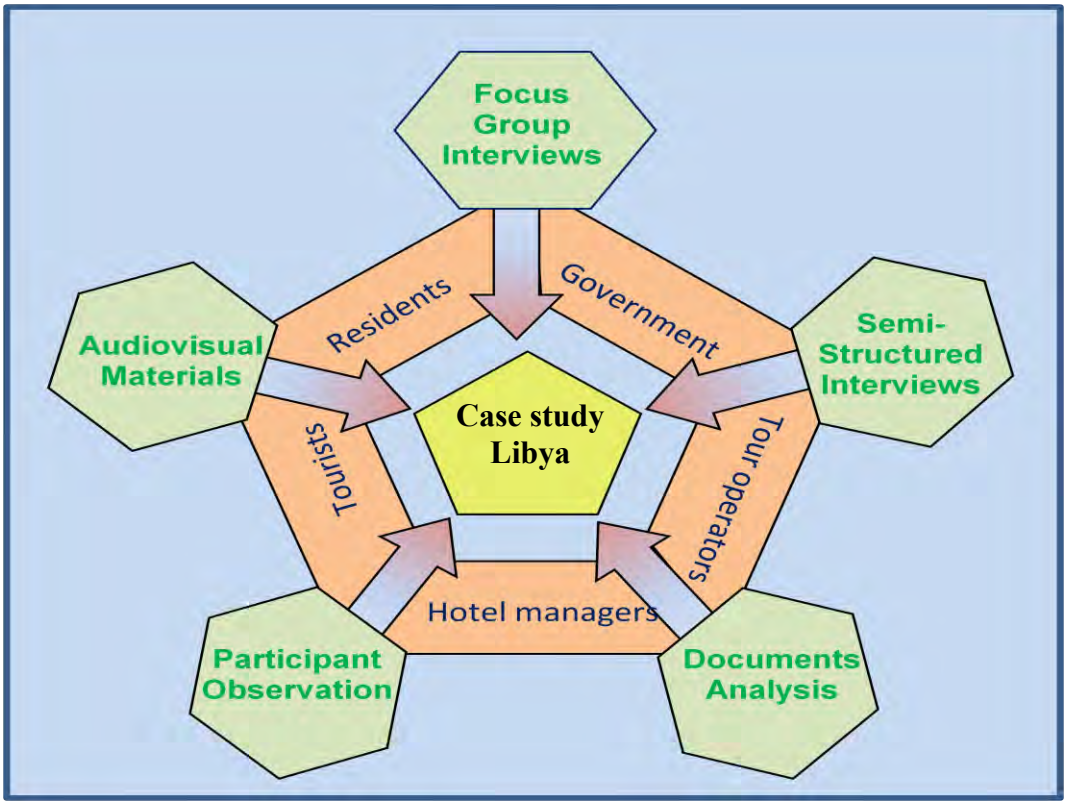
Data Collection types	Options within types	Advantage of the type
Observation	- Complete participant: researcher conceals role. - Observer as participant: role of researcher is known. - Participant as observer: observation role secondary to participant role. - Complete observers: researcher observer without participating	- Researcher has firsthand experience with participants. - Researcher can record information as it is revealed. - Unusual aspects can be noticed during observation. - Useful in exploring topics that may be uncomfortable for participants to discuss.
Interviews	- Face-to-face: one on one, in-person interview. - Telephone: researcher interview by phone. - Group: researcher interviews participants in a group.	- Useful when participants cannot be observed directly. - Participants can provide historical information - Allows researcher "control" over the line of questioning.
Documents	- Public documents such as minutes of meetings, and newspapers. - Private documents such as journals, diaries, and letters. - E-mail discussion.	- Enables a researcher to obtain the language and words of participants. - Can be accessed at a time convenient to the researcher-an unobtrusive source of information. - Represents data that are thoughtful, in that participants have given attention to compiling. - As written evidence, it saves a researcher the time and expenses of transcribing.
Audiovisual material	- Photographs - Videotapes - Art objects - Computer software - Film.	- May be an unobtrusive method of collecting data. - Provides an opportunity for participants to directly share their "reality". - Creative in that it captures attention visually.

Source: Creswell (2003, p.186-187). Note: Creswell (2003) included some material from Merriam (1998), Bogdan and Biklen (1992), and Creswell (2002)

Triangulation is the technique of using a number of data collection methods to ensure that the researcher addresses the phenomena from different angles in order to gain rich information. Therefore the researcher decided to use multiple sources of evidence to achieve triangulation and to grasp data and information, by employed different qualitative data collection methods, which were focus group interviews, semi-structured interviews, document analysis, participant observation and audiovisual materials (see Figure, 2.9). These tools were used to investigate and question all Libyan tourism

stakeholders. The adopted multiple sources of evidence were seen as the most appropriate and available methods for this study. The purpose of combining all these available methods is to increase the reliability and validity of the study.

Figure 2.9: Data collection methods and data information sources



Focus group interviews were employed to identify attributes concerning the image of the destination and exploring the Libyan image in the UK compared to its competitors in the MENA from the perspective of potential tourists (non-visitors). In-depth semi-structured interviews were conducted with the Libyan tourism stakeholders including: government officials, British tourists, tour operators, hotel managers, and residents. Also audiovisual material and document analysis were exploited in this study. During the data collection stage the researcher experienced and observed critical issues relating to quality of service where these issues did not emerge form other adopted methods.

2.4.2.1.1 Focus group interviews

Focus group methods are an important, sometimes essential tool used in marketing strategy. Focus groups interviews are qualitative research methods and are employed to extract the range of perceptions, feelings, thoughts and alternative viewpoints that people might have about certain issue (Wholey, *et al*., 2004). Mack *et al*. (2005, p.51) state that:

> *Focus groups are a qualitative data collection method effective in helping researchers learn the social norms of a community or subgroup, as well as the range of perspectives that exit within that community or subgroup.*

Bouma and Ling (2006) emphasise that focus groups gather together the strengths of in-depth interviewing and observation in a group context. Focus group sessions are usually audio-recorded, and sometimes videotaped. The researcher (the moderator) guides the discussion by asking the participants open-ended questions, which require an in-depth response rather than short answers such as "yes" or "no" (Mack *et al.,*2005).

According to Vaughn *et al.* (1996 cited in Puchta and Potter, 2004, p.6) a focus group usually contains the following two core elements:

1- A trained moderator who sets the stage with prepared questions or an interview guide;

2- The goal of eliciting participants‟ feelings, attitudes and perceptions about a selected topic.

Dawson (2002, p.29) defines a focus group as:

> *A number of people who are asked to come together in a group to discuss a certain issue.*

According to Calder (1977, 1994 cited in Puchta and Potter, 2004) there are three approaches to focus groups: the exploratory, the clinical and the phenomenological approach. The phenomenological approach is described as the most relevant and commonly used in marketing research. Effective phenomenological approach allows the researcher to share the experience of consumers. Focus group interviews enable the researcher to explore the nature and effects of ongoing social discourse in ways which are not available through conducting individual interviews or observation (Denzin and Lincoln, 2005).

Dawson (2002) points out that a focus group interview (sometimes called a group discussion) is led by a moderator or facilitator; his or her main responsibilities are introducing the topic, asking questions, and controlling the conversation. In addition, he or she must make sure that every participant contributes and no one participant dominates.

> *Effective moderating encourages all participants to discuss their feelings, anxieties, and frustrations, as well as the depth of their convictions on issues relevant to the topic, without being biased or pressured by the situation.*
>
> (Naomi, 1992, p.20)

There are always differences within the members of a focus group, for example in educational level, political tendency, income status, gender, culture and ethnic group. These differences directly effect their perceptions about the topic or the problem (Corlien, Indra and Ann, 2003). Burke and Larry (2005) point out that focus group sessions generally last between one and three hours and are recorded using audio and/or videotapes. However, focus groups are useful for exploring ideas and obtaining in-depth information about how people think about an issue.

Extracting the perceived image is not an easy mission since the quality of the data and approaches to eliciting rich and well-discussed information must be considered. Four focus groups were set up in this study and a focus group meeting was conducted with non-visitors to Libya. The first focus group was a pilot study, the second aimed to identify the tourism destination image attributes, while the third and fourth focus groups concentrated on exploring Libya‟s image in the UK market, with a comparison with its competitors in the MENA. The first focus group meetings were held at UWIC in Colchester Avenue, while the fourth focus group was held at Strathclyde University with twelve participants, eight of whom were Scottish and four from Northern Ireland. The focus group interviews were recorded with a Sony video camera and transferred to video tapes for analysis (more details are presented about focus group interviews in Appendix A.

2.4.2.1.2 Semi-structured interviews

In social science research there are many types of interviews, but the most common interviews are: structured, unstructured, and semi-structured (Dawson, 2002; Miller and Brewer, 2003; Saunders *et al*., 2007). According to Finn, Elliott-White and Walton (2000) these three different types of interviews can be used to gather primary data in the tourism and leisure industry and the type chosen will depend on the aims of the research. In a structured interview, a standard interview schedule is designed and questions predetermined ready for answering in a face-to-face interview. This type is more convenient for survey style interviews and produces quantitative data. However, a semi-structured interview has specified and predetermined questions, but will allow the researcher to delve further by facilitating discussion. This allows the investigation to

provide more clarification, and the data generated will be rich and qualitative. Finally, in an unstructured interview, no questions are predetermined. This is sometimes called an exploratory interview and is usually associated with ethnographic research. Drever (1995, p.52) suggests that the principles of conducting the interviews are:

> *You need to develop tactics for encouraging people to talk, moving them on through the questions, getting them to stop and think, and keeping them on the subject.*

In this regard, the meetings need to be conducted in an appropriate environment, in terms of time and place. The researcher encouraged the participants by opening the discussion with research objectives and the importance of developing the country, also the participants were given space to talk freely and discuss the issues that related to the research aim and objectives.

As the research endeavoured to gain rich and in depth information, semi-structured interviews were employed in this study as the main source of data collection beside focus group interviews. However, due to the limitations of structured and unstructured interviews, these methods were avoided. Thus, three semi-structured interviews conducted with government officials including the Media and Tourism Awareness Manager in the Libyan GBTTI, the Head of the Tourism Police Authority and the Master Card and Visa Department Manager at Al-Aman Bank.

Unfortunately, the Immigration and Nationalities Authority and the Infrastructure Authority and Environment Council did not respond to the researcher‟s request for interview No department managers who would be able to answer questions about tourism issues related to their authorities were able to take part in this study. After more

than three month of enquiries in July 2007, March 2008 and further attempts in August 2008 and despite efforts being supported by formal documents explaining that the researcher is conducting a field study in the area of tourism marketing, all the authorities rejected the approaches. There was no obvious reason behind their rejection, but after frequent visits the researcher felt that the Immigration and Nationalities Authority had concerns about information security, whereas the Infrastructure Authority had a sophisticated system of bureaucratic management.

Seven semi-structured interviews were conducted with tour operator managers. Eight semi-structured interviews were conducted with hotel managers including state, private, and joint venture hotels. Ten semi-structured interviews were also carried out with Libyan local residents from various regions across the country, some of whom had extensive experience working as tour guides or tour bus drivers; these people were a very useful source of information and related interesting stories about the tourism industry in Libya. Finally, six semi-structured interviews were conducted with British tourists (see Table 2.2).

Table 2.2: The number of focus group and interviews

stakeholders	Number of interviews	Place of the interview
British non-visitors	4 Focus group interviews	Wales and Scotland
Government officials	3 Semi-structured interviews	Tripoli-Libya
Tour operators	7 Semi-structured interviews	Tripoli-Libya
Hotel managers	8 Semi-structured interviews	Various locations-Libya
Local residents	10 Semi-structured interviews	Various locations-Libya
British visitors	6 Semi-structured interviews	Alyouser hotel/Tripoli International Airport

Tour operators, hotel managers and residents were interviewed during the period 5 June 2007 to 27 August 2007. The British tourists were interviewed in March 2008. Interviewing British tourists was a hard task because the tourists had a fixed and full programme. However, the most difficult aspect was that the tourists were escorted by tourism security officers who were unfriendly and unhelpful. The majority of British tourists go to Libya through the Wings tour operator and stay at Alyousr hotel in Tripoli. Therefore, due to the small number of British tourists and their limited time, the researcher selected group leaders of each group - three of whom were professors in heritage and antiquities science. Four interviews were carried out in the Alyouser hotel and two interviews were arranged in Tripoli International Airport. An additional challenge met by the researcher was that the tourists had to be at the end of their visit to ensure that they had already visited the country and gained experience of travel and tourism within Libya.

According to Bouma and Ling (2006) interviews can be recorded and descriptions created that allow the researcher to review the interview context many times. Silverman (2001) suggests the advantages of tape recording are tapes are a public record, and can be replayed and transcripts improved. They also preserve the sequence of the dialogue. Keeping the source of data is a crucial function for two reasons, first, the source of data is tangible evidence of the research findings and results, second, it can be reviewed as many times needed for the researcher comprehend the whole text which is translated and transcribed later. All the semi-structured interviews with government officials, tour operators, hotel managers, tourists, and local residents were recorded on 37 audio tapes and carefully kept.

2.4.2.1.3 Document analysis

Documents are secondary data collection methods, where the data was originally collected for other purposes. Burke and Larry (2005) divide documents into two types:

1- Personal documents, including written or recorded things for private purpose.
2- Official documents, including written or recorded things for public or private organisations.

By „things", they are referring to newspapers, magazines, annual reports, books, and dairies. Yin (2003, p.81) asserts that:

> *The most important use of documents is to corroborate evidence from other sources.*

Yin added that document analysis can be used for any case study. A number of documents have been analysed for the study including newspapers, especially BBC news which was found to be the most relevant source of information about Libya. In addition, some reports were used such as National Tourism Development Plan (NTDP), and UNWTO reports and statistics.

2.4.2.1.4 Audiovisual materials

This study also employed audiovisual materials, as tangible evidence presents the Libyan tourism industry from different aspects.

> *Photographs were a part of the unproblematic "facts" that constituted the "truth" of these tales.....The researchers came to the realisation that without photographs to indicate common understanding, their interviews did not make a great deal of sense, photographs made in the research became a bridge between the subjects and the researcher.*
> (Harper, 2000, p.730-731)

Photos were taken at various tourist attractions and facilities. Most of the photos revealed the level of Libyan tourism quality services and highlighted some crucial

issues for the tourism industry which are discussed in chapter seven. A Sony digital camera with high resolution of 12.1 mega pixels was used for this purpose, in order to achieve good quality photos, these photos provided a significant contribution for the research analysis.

2.4.2.1.5 Observation

Observation is a qualitative data collection method that requires disciplined planning and alertness. Observation can be carried out in two forms, namely, participant and non-participant observation (Bouma and Ling, 2006).

> *Observation involves the personal or mechanical monitoring of selected activities. It records actions as they occur and thus there is no lack of accuracy caused by a respondent's faulty recollection of their past actions or inadequate estimate of future ones.*
>
> (Proctor, 2000, p.206)

Jones and Somekh (2007) point out that participant observation achieves unique insights in behaviour and activities of observed subjects because the observer participates in group activities. However, the researcher observes participants in natural and/or structured environments; observation methods provide the researcher with a degree of realism (Burke and Larry, 2005).

According to Ely (1991 cited in Jones and Somekh, 2007) when they use the observation method, researchers are involved in the first phase of looking at the field before seeking out how to analyse the gathered data by establishing the essential meaning of the raw data. In fact, observation techniques were not planned in this study, but during the data collection stages, the researcher experienced some fundamental issues that had a critical impact on the Libyan tourism industry. These issues were not

identified by other data collection methods (interviews, documents, and audiovisual materials), and are discussed in full in chapter seven, however, the researcher took notes in his diary for analysis process.

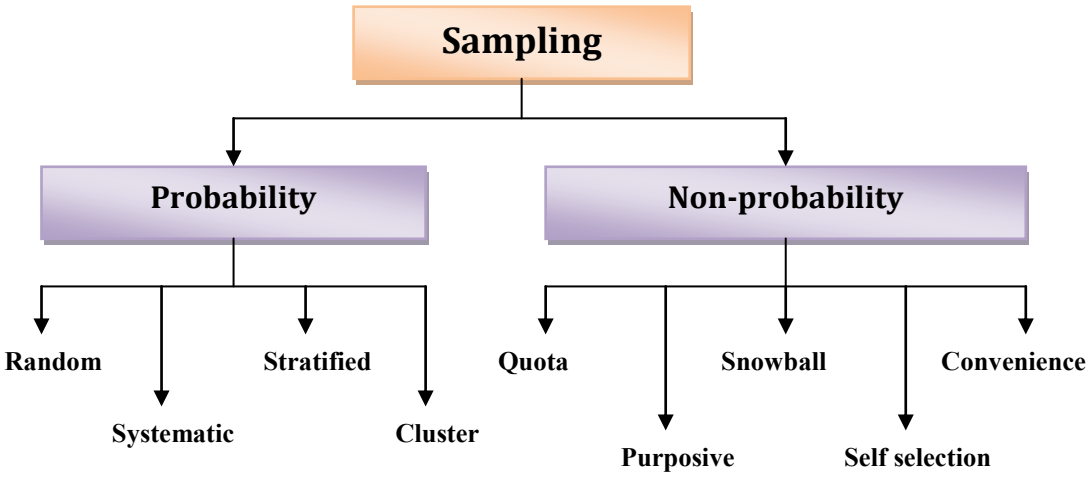
2.4.3 Population and sampling

Sampling means considering a part of a whole population. According to Dereshiwsky (1998) there are three reasons why researchers use samples: time; cost; convenience/accessibility. Finn *et al.* (2000) claims that researchers have to answer two questions in any sample survey: How should the sample be obtained and how large should the sample be? They suggest that there are basically two types of sampling: probability sampling, where each element in the population has an equal chance of being selected in the sample, and non-probability sampling, where not all elements have an equal chance of being selected. In this context Burns (2000, p.83) argues that:

> *We cannot make any valid generalisation about the population from which the sample was drawn unless the sample is representative.*

Burke and Larry (2005) believe that the main objective of sampling is to produce a representative sample which has similar characteristics of the population as a whole. Sampling is the scientific approach of getting data from part of the whole population; the selected samples must be representative in order to allow the researcher to generalize the research findings and results. However, there are a number of samples which can be utilized for qualitative data (see Figure 2.10).

Figure 2.10: The common sampling techniques and types



Source: Saunders *et al.,* (2007, p.207)

> *Even if it possible, it is not necessary to collect data from everyone in a community in order to get valid findings. In qualitative research, only a sample (that is, a subject) of a population is selected for any given study.*
> (Mack *et al.,* 2005, p.5)

According to Mack *et al.* (2005), in qualitative research there are three common types of sampling, which are purposive, quota and snowballing samples. In terms of this study, it was impossible to ensure that every element in the population had an equal chance to be interviewed, such as potential tourists in the UK, tourists, hotels and local residents due to the large size of the populations, the huge boundaries of the research area and the cost and time required. Due to the nature of the research and its approach, purposive and snowballing sampling were found to be the most appropriate sampling techniques for the study, which had the advantage of serving and meeting the research requirements.

2.4.3.1 Purposive sampling

Sampling in qualitative research is usually purposive; the primary goal in qualitative research is to select information-rich cases (Burke and Larry, 2005). Purposive sampling techniques are usually adopted when the sample is seen as representative of the whole population and helps the researcher satisfy research inquiries. Saunders *et al.* (2007) believe that purposive sampling can take a number of shapes, such as the extreme case, heterogeneous, homogeneous, critical case and typical case.

> *Many qualitative researchers employ… purposive, and not random, sampling methods. They seek out groups, settings and individuals where …the processes being studied are most likely to occur.*
>
> (Denzin, 1994, p.234)

2.4.3.2 Snowball sampling

According to Saunders *et al.* (2007), the snowball sampling method is a common technique used when it becomes difficult to identify all elements inclusive of the population. They suggest four steps when the researcher adopts the snowball sampling technique:

1- The researcher has to contact one or two members of the population;

2- The researcher asks those members to identify further members;

3- The new member is also asked to identify more members;

4- The researcher stops targeting new members when there no more members are available, or the sample becomes big enough for analysis.

As discussed above not all members of the population had an equal chance of being selected in this study. Furthermore, the researcher sometimes was unable to identify the appropriate members to be interviewed. For instance, the government officials

interviewed were not identified prior to carrying out the study. The researcher intended to interview a representative in the GBTTI, so the researcher met the secretary who recommended the Awareness and Media Manager as the best source of information for the study. Also, when the researcher went to the Alaman bank, he was directed to the Visa and Master Card manager, who had adequate information about currency exchange and credit cards.

Again, getting an appropriate sample of tour operators was not an easy mission; the researcher experienced a lot of difficulties when he went onto the main streets of Tripoli trying to identify tour operators and travel agencies that attracted foreign tourists. Surprisingly, a huge number of tour operators and travel agencies are predominately operating locally even - though they put signs and posters on the windows showing that they are operating internationally. By chance the researcher discovered that most of those tour operators and travel agencies did not have a marketing department and had no idea about marketing activities. In fact, a number of them stated that they do not do any marketing whatsoever. Avoiding the problem of wasting time, the researcher turned to the GBTTI and asked for help. The GBTTI provided the researcher with a list of the main tour operators who attract foreign tourists, and they recommended some of them who are leaders in the market.

2.4.3.3 Sample size

The biggest concerns about the sample size are what size is relevant to the study and the associated risks of selecting a bad sample (Glenn, 2003). Matthews (2006) points out that in a qualitative research, the sample size tends to be small, due to the large volume

of gathered data. Concerning the number of focus groups to be conducted, there are no definitive guidelines regarding the number of focus groups that should be conducted in any one study (Krueger and Casey, 2000). The only available guidelines suggest that qualitative interviews (including focus group and semi-structured interviews) are continually reviewed as the research is being conducted, if additional interviews do not add further insight to information gained by previous interviews then the researcher should stop conducting the interviews (Churchill, 2004).

In terms of sample size, whilst this study tends to be qualitative, the size of each sample is controlled for the purpose of the study, therefore, the researcher decided to conduct semi-structured interviews until he achieved data saturation and he was getting the same answers and no further contributions were offered. For the focus group interviews, the sample size was determined by scholars (as discussed above) who suggest that focus groups number between four and twelve participants. Thus, here the number of focus group members‟ was between four and thirteen members. The Libyan image amongst Welsh, Irish and Scottish people did not greatly differ and there were no major differences between the groups in terms of their knowledge, experience and expectations about Libya, and the MENA region as a whole. Focus groups three and four revealed that the Welsh, Scottish and Irish have similar perceptions about Libya. This impression indicated to the researcher that nationality was not an issue among the Welsh, Scottish and Irish and therefore there was no need to conduct more focus group interviews in England.

As discussed previously, multiple sources of evidence (methods) were employed for this study to acquire rich accurate and sufficient information, which was gained by using multiple stakeholders including governors, tourists, tour operators, hotels, and local residents. To generalise the results, samples must be representative and the researcher made great efforts to ensure that the samples were carefully selected from different parts of Libya, particularly in the areas which have tourist attractions. Figure 2:11 shows how the samples were selected across the country.

Figure 2.11: Sample distributions

2.4.4 Pilot study

One focus group and three semi-structured interviews were conducted as pilot studies for each phase of the field work. The focus pilot with four staff participants was conducted at the University of Wales Institute Cardiff. The pilot study was very

successful, not merely in generating a good list of attributes, but also as a learning experience for the researcher in terms of how to run successful focus group interviews for the future. The researcher was very keen to involve all members of the group in the discussion, as well as letting them express their perceptions and feelings about the destination image attributes. The key lessons learned from the pilot study focus group were:

1- Time is a very important factor in focus group interviews; the moderator should open the discussion as early as possible.
2- To achieve a successful focus group interview, the moderator should ensure a high degree of group homogeneity.
3- The moderator‟s mission is to integrate and narrow down group opinions, and individual ideas must be shared and adopted by the group.
4- While the aim of the focus group interview is to collect qualitative data and obtain accurate descriptions, interviewees must be asked „how‟ and „why‟ thus probing questions are needed to open up the discussion.
5- At the end of the discussion the moderator realized the importance of sorting these salient attributes, including which attributes are more important than others.
6- The moderator should explore the importance of a feedback sheet to ensure the group members are satisfied or not, and whether they thought the discussion was free, open and non- threatening.

The three pilot semi-structured interviews were conducted with a tour operator, hotel manager and local resident. The first one was carried out on Wednesday 4th July 2007

with the Wings tour operator in Tripoli. This meeting provided the researcher with a wide range of information about tour operators‟ activities as well as the mechanism of their work. For the first time the researcher was able to distinguish between a tour leader and a tour guide and whether they are part of the tour operating group or not.

The second pilot semi-structured interview was carried out with the manager of Ben-Yedir Hotel in Gadamis, whist the third pilot semi-structured interview was conducted with a local resident in Tripoli. During these pilot studies the researcher realised that some questions were confusing, such as the question of what characteristics or advantages make Libya a unique destination? Equally, the question of how Libya can differentiate itself amongst its competitors in the MENA region was slightly confusing. However, some crucial questions were raised through the pilot study, such as the benefits of tourism for local residents and the description of the handicraft industry.

2.4.5 Data analysis

Data needs to be processed to make it useful and meaningfully understood; the data collected probably needs to be grouped into categories prior to the process of analysis (Saunders *et al*., 2007). According to Mack *et al*. (2005), data that are collected through focus group interviews are transcribed and coded according to the participants and or the emergent themes.

Analysing the data is a vital task at this stage, so while this research is qualitative, it is necessary to look for appropriate data analysis techniques in order to gain useful information. Focus group interviews were coded and transcribed and semi-structured

interviews conducted in the Arabic language were then translated into English. The translation itself took about three months and produced more than 154 pages which, due to its length, cannot be attached as appendices.

2.4.5.1 Content analysis

Gary (2004) identifies two common data analysis for qualitative data, which are content analysis and grounded theory. Content analysis can be defined as:

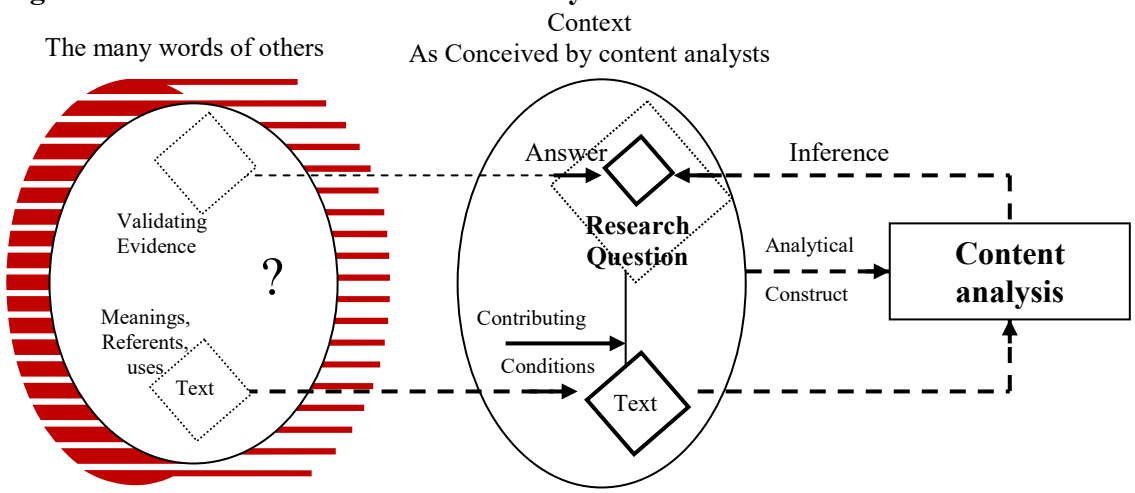
> *An overall approach, a method, and an analytic strategy that entails the systematic examination of forms of communication to document patterns objectively.*
>
> (Marshall and Rossman, 1995, p.85)

Krippendorff (2004, p.29) developed a framework for content analysis as presented below in Figure 2.12, which can serve three purposes:

1- *To guide the conceptualization and design of practical content analytic research.*
2- *To facilitate the critical examination and comparison of published content analyses.*
3- *To point out performance criteria and as a precautionary standard that the researcher can apply in evaluating ongoing content analyses.*

From Krippendorff‟s (2004) point of view, most content analysis starts with data which cannot be designed specifically to answer the research questions. The analyst should examine the body of the text to help answer the research question. However, the analytical construct operationalises the researcher‟s awareness about the context.

Figure 2.12: Framework for content Analysis



Source: Krippendorff (2004, p.30)

The researcher was concerned about how to analyse the required data since the first stage of this study. Whilst the interviewees were asked to express their experience and to identify challenges that face Libya"s tourism industry, therefore, the study focuses on the text itself and the content of the dialogue, which is relevant to the topic and answers the research questions. However, the behaviour and emotions of the interviewees have no influence on the produced data and had no meaning in this study.

2.4.5.2 Software for data analysis

There are five main software programs for analysing qualitative data which are; folio VIEWS, ATLAS/ti, NUD*IST, NVivo, and winMAX (Weitzman, 2000). It is important to take into account that the software programme does not analyse qualitative data but rather assists the researcher in the analysis by gathering texts from the interviews (sources) and categorising it under one theme or themes (nodes and sub-nodes). Therefore, it was decided to use the NVivo programme to organise the huge amounts of gathered data in order to help the researcher at the analysis stage. All focus group

interviews and semi-structured interviews were entered into the system as sources, the nodes divided according to the designed sustainable competitive destination model, demand side consists of the destination image and factors such as (the international media, tour operators and travel agencies, trust and connectivity, branding and positioning). On the other hand, supply side includes six nodes: comparative advantage, supporting resources, destination planning and management, local communities, service quality and the global environment. Each node has a number of elements as discussed in detail later in chapters seven and eight. Although NVivo programme does not analyse qualitative data, but it provided the researcher the ability to gather and organise the huge data collected it also classified the data under specific themes.

2.5 Ethical considerations

Research ethics are concerned with the appropriateness of the researcher‟s behaviour and attitudes in relation to the rights of the target audience or interviewees who become the subject of the research work (Saunders *et al*., 2007). Blaxter *et al.* (2006) claim that in social science research, responsibility and ethical issues should be the top priority. They also assert that ethical issues arise essentially in the first stages of the research design which must employ appropriate approach for data collection. Therefore, there are several aspects were considered in this study, such as informed consent, potential harm and risk, honesty and trust, and finally privacy, confidentiality, and anonymity.

2.5.1 Informed consent

Informed consent is concerned with the level of awareness for the participants in what the researcher is doing, and what the purpose of the study is. Hence, the researcher

introduced himself and his project to all participants in the focus group interviews and semi-structured interviews, and he presented formal letters for conducting field work study, a copy of these letters are attached in appendix B. This procedure ensures the study has considered the ethical issues and that all participants are aware and informed about the study; it also encouraged the participants to feel more relaxed allowing them to contribute effectively. On the other hand, all participants had the option of taking part in this study or not.

2.5.2 Harm and risk

According to McCall and Simmons (1969) cited in Miles and Huberman (1994, p.292) "*real or feared harm will always occur to someone in a qualitative study*". The researcher attempted to ensure all participants in the study would not face any kind of harm or risk. These guarantees came from three factors. Firstly, the researcher informed the participants their views will be used for this study only. Secondly, none of the participants" names were published in this study as the researcher used coded names. Thirdly, the study aims to develop the country, where most the people whish to contribute in this effort. Therefore, the participants who were involved were not under any risk that their comments and attitudes would result in harm.

Despite the fact that the researcher informed the participants of absence of risk in voicing opinions, some participants expressed fears. Tourist3 was worried about his contributions and his stories which he had experienced in Libya. He seemed to be a little emotional and sensitive. He asked the researcher to not include his comments in the study if it would result in preventing British tourists visiting Libya in the future. The

researcher explained to him this is an academic study aiming to develop tourism industry for tourists, and the study results will help decision makers to identify the tourism obstacles and how they can make the right decisions. In addition Hotel6, a hotel manager who gave brief answers, obviously wanted to avoid telling the truth as his answers were not convincing, for example when he was asked about alcoholic drinks, when describing the relationship between his hotel and the tourism authority, and when he was asked about the difficulties and barriers that faced the hospitality sector.

2.5.3 Honesty and trust

The issues of honesty and trust, is focused on the relationship between the researcher and target audience. According to Miles and Huberman (1994), qualitative researchers tend to tell the truth and are unlikely to lie, cheat or steal in the course of their work. Keats (2000) suggests that researcher should have a good relationship with the interviewees and avoid talking to the participants precisely or the research title does not reflect the research contents and inquiries. Keats (2000, p.32) added that:

> *Apart from the ethical issues involved, deliberately giving misleading information also can have disastrous effects upon the respondent-interviewer relationship when respondents later begin to realise that they have been misled.*

The researcher has considered this issue by providing the interviewees with sufficient information about him and his researcher; additionally, both the researcher and the interviewees were Libyans and wished to see their country developing. Hence, the researcher was very keen to build trust between the two parties by providing the correct information.

2.5.4 Deception

Deception refers to the process of obtaining information through trickery or fraudulent means (Punch, 1994 cited in Denzin and Lincoin, 1994, p.20). Whilst this research aims to provide a framework and make recommendations for developing Libya as internationally-competitive tourism destination, all participants were happy and expressed their feeling to participate and make their significant contributions, thus, there was no reason for the researcher to use any sort of tricks to obtain information.

Privacy, confidentiality, and anonymity:

Sieber (1992 cited in Miles and Huberman, 1994, p.293), made distinctions between these three ethical terms:

> ***Privacy:*** *control over others' access to oneself and associated information; preservation of boundaries against giving protected information or receiving unwanted information.*
> ***Confidentiality:*** *agreement with a person or organisation about what will be done (and may not be done) with their data; may include legal constraints.*
> ***Anonymity:*** *lack of identifiers, information that would indicate which individuals or organisations provided which data.*

The privacy and anonymity of participants in the study, particularly, individuals involved in semi-structured interviews, whose privacy, confidentiality, anonymity and consent to participate in the study was protected. In addition, individual informed consent was obtained prior to involving interviewees in the study. Assurances were given to them that research findings would be only used in confidence and for academic research purposes, and gathered data for this study would not appear for other purposes.

2.6 Validity and reliability

> *Validity is the extent to which the information collected by the researcher truly reflects the phenomenon being studied. In contrary Reliability is the extent to which research findings would be the same if the research were to be repeated at a later date or with a different sample of subjects.*
> (Veal, 1997, p.35)

Yin (2003) asserts that the development of case study design needs to maximize four conditions related to design quality:

1- Construct validity.

2- Internal validity (for explanatory or causal case studies only).

3- External validity.

4- Reliability.

Yin (2003, p.35) states that many people argue that:

> *A case study investigator fails to develop a sufficiently operational set of measures and that "subjective" judgments are used to collect the data.*

Yin (2003, p.35) explains that construct validity establishes the right operational measures for the concepts within the study. He suggests two steps that the investigator must be sure are covered when testing of the construct validity:

1- *Select the specific types of changes that are to be studied (and relate them to the original objectives of the study).*
2- *Demonstrate that the elected measures of these changes do indeed reflect the specific types of change that have been selected.*

Yin (2003) believes reliability is concerned about the lasting application of a study. If a later investigator followed the same set of procedures, as described by the earlier investigator and conducted the same case study, the results and conclusion would be the

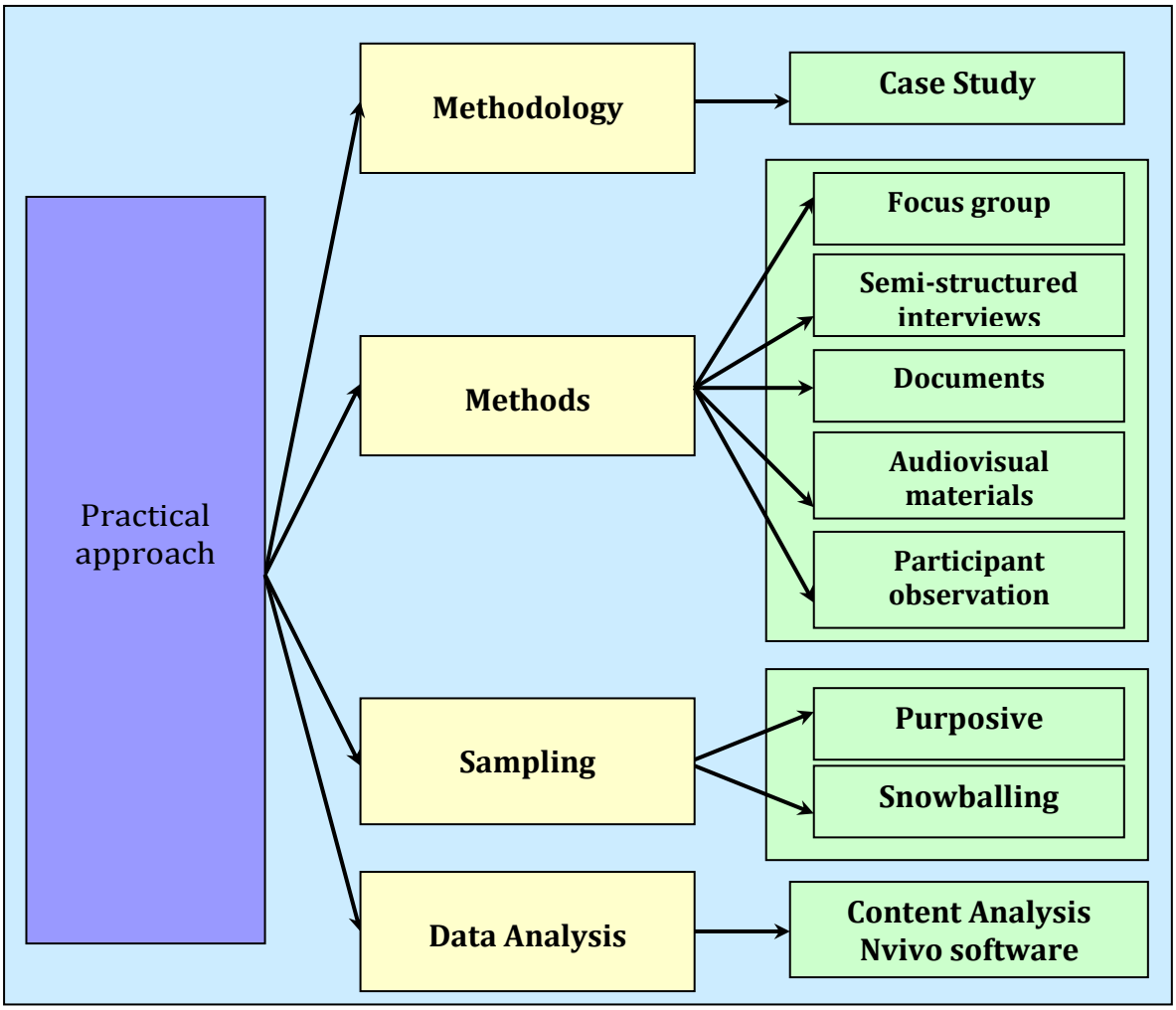
same. Reliability aims to minimise the errors and biases of the study. According to Yin (1989 cited in Creswell, 2003, p.195):

> *In a limited way, qualitative researchers can use reliability to check for consistent patterns of theme development among several investigators on a team. They can also generalize some facets of multiple case analyses.*

Internal validity is only use for causal or explanatory case studies, when there is a relationship between variables. However, external validity concerns the generalisation of the findings. In spite of the instability of phenomena elements, and doubts about reliability and generalizing the findings of qualitative researches, the researcher argues that the degree of reliability and generalization of the findings of qualitative research are reliant on the adopted systematic approach, including sampling techniques, and the nature of the case study.

Reliably and validity were the core concerns of this study. A triangulation approach was seen as an appropriate solution to increase the reliability and validity, therefore, this study employed five research methods (focus group interviews, semi-structured interviews, participant observation, document analysis, and audiovisual materials), and gained data from five information sources (government officials, tour operators, hotel managers, tourists and local residents) In addition, the samples are selected from various locations across the country as described above in Figure 2.11. Figure 2.13 summarises the practical approach justification, it shows a case study was applied as research methodology, where five research methods employed to gain the required data, and it also presents the sampling techniques and data analysis that adopted in this study.

Figure 2.13: Research practical approach justifications



2.7 Summary

This chapter has demonstrated the research epistemology, theoretical perspective, methodology and methods. This study applied a systematic approach from the first stage of research design until the data was collected and analysed. The research questions and objectives influenced the researcher to adopt a qualitative approach, in order to gain rich information about the phenomenon and investigate certain issues in detail. There are a number of data collection methods available in case study research. This is a comprehensive study addressing most of the destination competitive elements including

the image, destination branding, comparative advantage, competitive advantages, destination planning and management, services quality and the global environmental impacts on tourism development.

With the intention of obtaining high validity, the data were collected by employing multiple methods, including participant observation, focus group interviews, semi-structured interviews, document analysis, and audiovisual materials. Moreover the data were gained from different destination stakeholders (governors, tourists, residents, tour operators, and hotel managers). However, in order to maintain high reliability the samples were selected carefully for different categories (state, private), and locations (urban, rural) which serves the study purpose.

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Chapter 3: Tourism Sustainability and Competitiveness

3.1 Introduction

The following literature review provides critical appraisal of previous studies that relate to the research subject. It begins by presenting the background to the subject, and then proceeds to review tourism impacts. The concept of sustainable development, its importance, principles, and objectives are then explored before Triple Bottom Line Sustainability (TBLS) in relation to economic, socio-cultural and environmental agendas, is addressed. The chapter also discusses destination competitiveness dimensions and strategy. The chapter also reviews and discusses alternative destination competitive models; these competitive models subsequently form the basis to develop a Sustainable Competitive Destination Model (SCDM).

3.2 Background

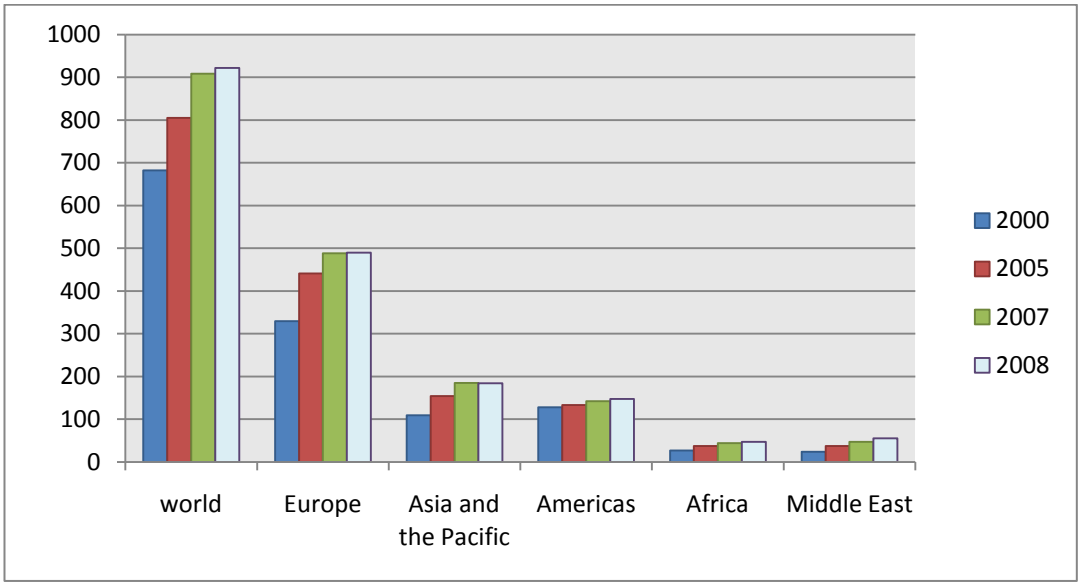
Tourism is often considered to be a twentieth-century phenomenon (Faulkner *et al*., 2001). Indeed, the travel and tourism industry has witnessed rapid growth in recent decades, and has become one of the largest industries in the world. Recent statistics show that international travel and tourism grew by 2% in 2008 with 922 million international arrivals, up 18 million over 2007 (UNWTO, 2009).

According to the UNWTO, 2008 and 2009 were hard years for tourism industry as a result of the global economic performance and the evolution of the influenza A (H1N1). The number of international arrivals was expected to decline by 5% in 2009, while 2010

is expected to see a slight improvement, despite the critical period in 2009, travel and tourism has gloomy future, by 2020 international arrivals are expected to reach 1.6 billion (UNWTO, 2009). The Middle East has seen dramatic surge in 2008, the number of international arrivals reached 55 million, an increase of 18% over the previous year.

Despite the statistics confirming the dominance of Europe and the Americas last decades, it is readily apparent that their market share is being eroded year on year, whereas East Asia/Pacific has seen a substantial increase, with Africa and the Middle East recording smaller, but still nevertheless, significant improvements in their market position (see Figure 3.1).

Figure 3.1: International arrivals from 2000-2008

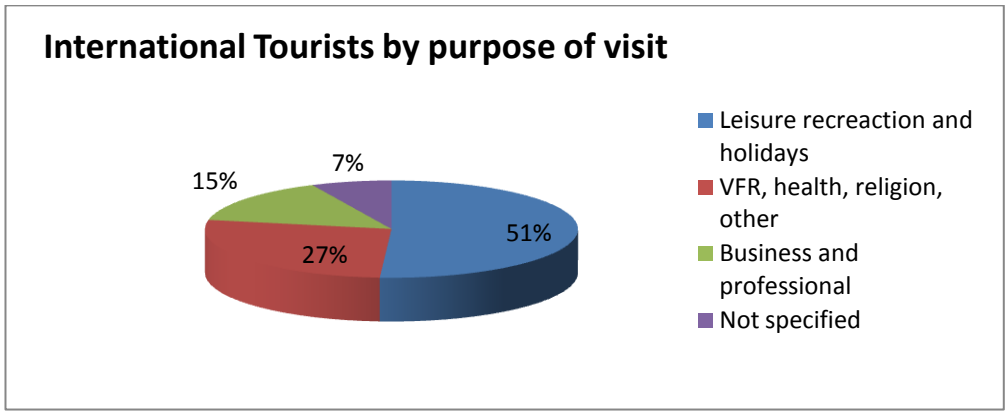


Source: UNWTO (2005, 2009)

Another useful statistic is that relating to international arrivals by the purpose of visit, and Figure 3.2 illustrates this information for 2008, revealing that the majority of international tourists (51%) in that year were undertaking trips for leisure, recreation and holiday. A further 15% were involved in business travel, 27% were travelling for

other motives such as visiting friends, relatives, religious purposes and health treatments, and the remaining 7% did not specify a reason.

Figure 3.2: International Tourists by Purpose of Visit in 2008



Source: UNWTO (2009)

Interestingly, the international tourism industry has experienced rapid growth, irrespective of the instability in the Middle East area, the continuing tragic war in Iraq, and the increasing activities of extremist movements such as the Al-Qaida organisation, combined with recent natural disasters such as the Asian Tsunami in 2004, global economic cries and last not least the Swine flow, appears not to have deterred the market.

The travel and tourism industry contribution to the World GDP is expected to rise from 9.9% (US$ 5,890 bn) in 2008 to 10.5% (US$ 10,855 bn) by 2018, and it is also anticipated that the industry will offer more job opportunities, rising from 8.4% in 2008 to 10.8% in 2018 of total global employment. In addition, the export earnings from

international visitors and tourism goods generated 11% of total exports (US$ 2,103 bn) in 2008 (WTTC, 2009).

The MENA region can be divided into two categories; first countries with tourism experience and a rich tourism history due to their diverse cultural heritage and archaeology, e.g. Egypt, Jordan, and Tunisia, second countries with insignificant incoming tourism due to their economies being bolstered by other resources, such as oil revenues, and these include Libya and Gulf countries (Daher, 2007).

3.3 Tourism Impacts

Despite the 11th September 2001 terrorist attack, the US ranked first in terms of tourism receipts worldwide, being followed by China, France and Spain in 2008. International tourism receipts rose by 1.7% in 2008 to reach US$ 944 billion, however, visitor expenditure on accommodation, food and drink, transport, entertainment and shopping are important pillar for destinations economy (UNWTO, 2009).

The tourism industry has substantial impacts upon both developing and developed countries, although as Yunis (2004) observes, it plays a significant role in the economies of poorer countries, and is growing faster in the developing world than in the advanced nations. That said, there are still areas of the world which are not significantly involved in tourism, because as reported by the UNWTO (2006), at least 25 million people in more than 52 countries have been displaced by violence, persecution and disasters which have sharply affected tourism activity in these countries.

Like other industries, the travel and tourism industry has both positive and negative impacts on the environment, and whilst for many destinations travel and tourism is seen as potentially attractive, destination managers should not ignore its negative effects, which can significantly influence the economy, culture, environment and the people. This point is made by Jones and Haven-Tang (2005, p.32), in their observation that:

> *Tourism can have a potentially negative impact on local ecosystems and this represents one of the greatest challenges for the tourism industry. Although tourism can bring economic and social benefits to local communities, together with an improved quality of life, tourism inevitably transforms the rural destination.*

Lickorish (1994 cited in Mason, 2008, p.72) indicated that the positive economic impacts are the following:

- Contribution to foreign exchange earnings;
- Contribution to government revenues;
- Generation of employment opportunities;
- Contribution to regional development.

On the other hand, there are negative economic impacts that are mostly related to inflation rates, opportunity costs and over-dependence on tourism (Mason, 2008). Indeed, for many destinations or regions, tourism activity leads to high rates of inflation and that becomes worse in poor countries. However, tourism does not necessarily have negative impacts on the domestic economy (Sugiyarto *et al*., 2002), and much depends on effective planning and implementation. In this respect, Ritchie and Crouch (2003) argue that tourism strategies should be capable of meeting the economic requirements and aspirations of local communities for long-term plans.

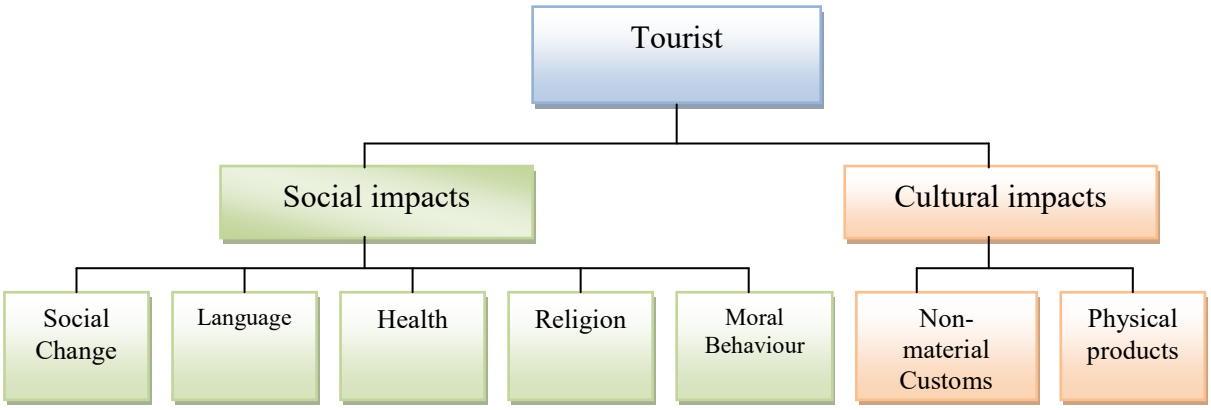
Pearce *et al.* (1996) compare a large number of surveys which summarise the socio-economic, environmental, and socio-cultural impacts of tourism, and list the major influences, both positive and negative. The principal major findings of their summary are that tourism is a vital source of revenue (through taxes), employment, and infrastructure development, which all require investment and adequate tourism facilities. On the other hand, tourism has negative impacts on the cost of living, public services, traffic, pollution, crowding, noise, crime, and the quality of life of host country communities.

Another study conducted by Ratz (2003) revealed that the main tourism benefits are: employment opportunities; language skills; income and standard of living, opportunity for learning more about other nations; general infrastructure, quality of restaurants; quality of life; culture facilities and opportunity for meeting interesting people. Discussing the socio-cultural impact needs verification of what socio-cultural means. According to Mason (2008, p.42):

> *Sociology is the study of society and is concerned with the study of people in groups, their interaction, their attitudes and their behaviour. Culture is about how people interact as observed through social interaction, social relations and material artefacts.*

Tourism is often viewed as having negative impacts on culture and local festivals and events (Richards, 2007), and tourists have significant social and cultural impacts upon tourism destinations. However, these impacts vary from one community and destination to another (Shaw and Williams, 2002). Figure 3.3 illustrates the dimensions of these social and cultural impacts.

Figure 3.3: Dimensions of Socio-cultural Impacts



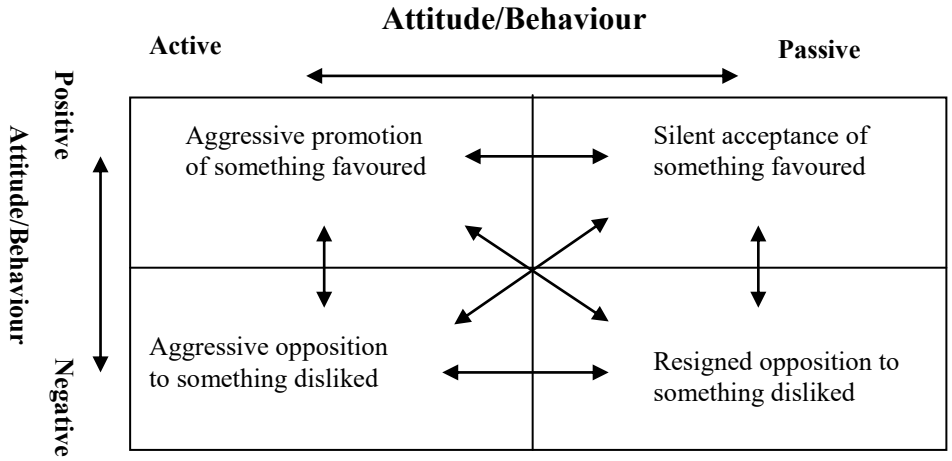
Source: Shaw and Williams (2002, p.100)

The Shaw and Williams (2002) framework demonstrates the tourism impacts on society and culture. The social impacts are shown as changes in: a) social characteristics and behaviour, b) the local language as it is exposed to influxes of other languages which have the potential to change the identity of a destination when tourism cannot be controlled, c) health, as evidence demonstrates that tourists can be a source of increased disease in a destination, and d) religion: as local people become involved in tourism experience culture drift. In this respect, a study conducted in Bali suggests that people who moved from their home village in order to take up tourism jobs, did not return to their village for temple ceremonies (Cukier, 1998).

Offering another model to analyse local residents‟ attitudes and behaviour, Bjorkland and Philbrick (1975) produced a dynamic framework as presented in Figure 3.4. This framework interprets host community members‟ attitudes and behaviour towards tourism using a matrix that shows movement from active to passive and from positive to

negative. The most risky situation is when residents become active and have a negative attitude towards tourism.

Figure 3.4: Residents' Attitudinal and Behavioural Matrix



Source: (Bjorklund and Philbrick, modified by and cited in Shaw and Williams, 2002, p.101)

The framework provides a clear vision of local communities" attitudes and behaviours towards tourists, which is an important consideration because if local residents are not benefiting from tourism and moreover, are not involved in the tourism planning process, the whole industry may be exposed to risk when local communities become aggressive towards tourists or tourism projects. Hence, the involvement of local communities in the planning and decision-making process is crucial. According to Keyser (2002, cited in Sigala and Leslie, 2005, p.104), cultural shock and cultural arrogance are often the underlying causes of conflict between tourists and host societies, and to avoid such conflict, Leslie (2005, p.133) suggests that:

> *In terms of the promotion and development of cultural tourism, empowering the community through effective participation in the planning processes is seen as essential to sustaining the cultural*

heritage and is thus a contributory factor in progress towards sustainable development.

According to Weaver (2002), any discussion of tourism sustainability must take into account the physical and cultural characteristics of the destination under investigation. On this theme, Reid (2007) argues that further research is required to identify a range of social consequences which emerge after hosting tourists and cultural events.

3.4 The Importance of Sustainable Tourism for Destination Competitiveness

War in Iraq, terrorism, chronic conflict in the Middle East between the Arab World and Israel, disasters in America and the Far East, sharp rises in oil prices, international inflation phenomena, the global credit crunch, and natural disasters are all phenomena that present the current tourism industry with major challenges. Nonetheless, as reported earlier, travel and tourism continue to record high growth, the UNWTO documenting that international tourism arrival grew by 3.9% in 2004, 5.5% in 2005, 4.5% in 2006, and 6% in 2007.

Jones and Haven-Tang (2005, p.1) argue that sustainable "*tourism as a vehicle for economic development in any destination depends on maintaining destination competitiveness*", believing that the relationship between sustainable development and destination competitiveness, pushes destinations to implement sustainable development plans. On this issue, Mckercher (2002, p.3) lists five main forces that can drive the tourism industry to consider and adopt sustainability, these being:

- *Tourism consumption of non-renewable resources is limited apart from transport;*

- *The core resource bases for tourism are community resources and culture;*
- *Tourism can make cultural and natural resources renewable;*
- *Tourism can be available to even remote communities which have no other economic choices;*
- *Tourism provides opportunities to create employment to stimulate regional economic development and reduce poverty.*

3.5 Principles and Objectives of Sustainable Development

In 1990 the seven principles for Sustainable Development (SD) were formulated by the International Council on Monuments and Sites (ICOMOS) UK Culture Tourism Committee. Considers the conservation and protection of cultural heritage places, these are as follows:

- *The environment has an intrinsic value which outweighs its value as a tourist asset. Its enjoyment by future generations and its long term survival must not be prejudiced by short term considerations;*
- *Tourism should be recognised as a positive activity with the potential to benefit the community and the place as well as the visitor;*
- *The relationship between tourism and the environment must be managed so that it is sustainable in the long term. Tourism must not be allowed to damage the resource, prejudice its future enjoyment or bring unacceptable impact;*
- *Tourism activities and development should respect the scale, nature and character of the place in which they are sited;*
- *In any location, harmony must be sought between the needs of the visitor, the place and the host community;*

- *In a dynamic world, some change is inevitable and change can often be beneficial. Adaptation to change, however, should not be at the expense of any of these principles;*
- *The tourism industry, local authorities and environmental agencies all have a duty to respect the above principles and to work together to achieve their practical realisation* (Robinson *et al.,* 2000, p.289-291).

Sharpley"s (2002) model of STD principles and objectives determined the requirements for SD, which gives destination managers a framework for SD, these principles and objectives are illustrated in Table 3.1.

Table 3.1: A Model of SD- Principles and Objectives

Fundamental principles	*Holistic approach*: development and environmental issues integrated within a global social environment.
	Futurity: focus on long-term capacity for continuance of the global ecosystem.
	Equity: development that is fair and equitable and which provides opportunities for access to and use of resources for all members of all societies, both in the present and future.
Development objectives	Improvement of the quality of life for all people: education, life expectancy, opportunities to fulfil potential.
	Satisfaction of basic needs, concentration on the nature of what is provided rather than income.
	Self-reliance: political freedom and local decision-making for local needs.
	Endogenous development.
Sustainability objectives	Sustainable population levels.
	Minimal depletion of non-renewable natural resources.
	Sustainable use of renewable resources.
	Pollution emissions within the assimilative capacity of the environment.
Requirements for SD	Adoption of new social paradigm relevant to sustainable living.

	International and national political and economic systems dedicated to equitable development and resource use.
	Technological systems that can search continuously for new solutions to environmental problems.
	Global alliance facilitating integrated development policies at local national and international levels.

Source: Streeten, 1977; Pearce *et al*., 1989; WCED, 1987; IUCN, 1991; cited in Sharpley, 2002, p.329.

As an example, the four aims of the Wales Tourist Board which is now part of the Welsh Assembly Government in respect of STD are provided as follows:

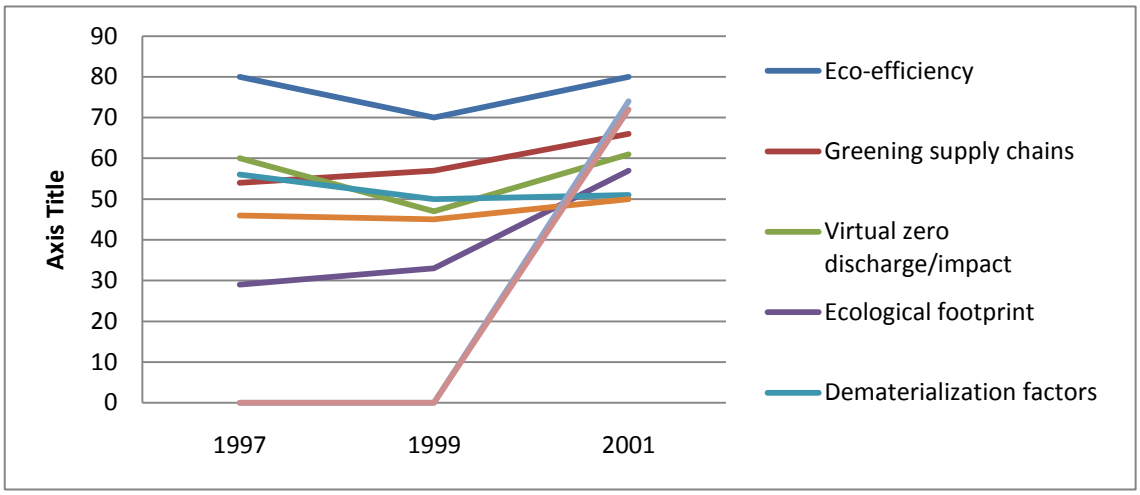
1- *To develop and market tourism in suitable ways which bring social and economic benefit to Wales;*
2- *To offer high standards of product, quality and service;*
3- *To support and promote Welsh culture and the Welsh language;*
4- *To protect and improve the environment, the natural beauty of the country and its buildings* (Johnson, 2002, p.172).

3.6 Triple Bottom Line (TBL) Approach for Tourism Sustainability

The Triple Bottom Line (TBL) concept was established by Elkington (1994), in response to his search for a new language of achieving a balance between the economic, social and environmental agenda. Elkington (1994) claimed that the social and economic dimensions of development should be addressed in a more integrated way, in keeping with the objectives of the Bruntland Report in 1987, and his concept of TBL became recognised as meaning the addition of economic value and the impact on society and the environment (Richardson, 2004), of any venture. According to Elkington (2004), the concept of TBL emerged as a result of international experts" survey in corporate social responsibility (CSR) and sustainable development (SD) in

1990, and grew rapidly over the two years from 1999 to 2001, as shown in Figure 3.5. Indeed, since the late 1990s, the term TBL has been used widely.

Figure 3.5: The TBLS takes off (CSR and STD Framework)



Source: Environics International cited in Elkington (2004, p.2)

The TBL concept is accepted as valuable by scholars. For example, Henriques (2005, p. 26) comments that it *"is a brilliant and far-reaching metaphor. It has stimulated much corporate activity and has generated tools that can yield quantified expressions of triple bottom line performance."*

According to the European Commission (2000), tourism can contribute to TBL dimensions as follows:

1- Economically: sustainable tourism development can improve the competitiveness of enterprises.

2- Socially: sustainable tourism can enable groups to meet their needs and to encourage responsible behaviour of visitors, of the employees of tourism enterprises and of the local communities.
3- Environmentally: sustainable tourism development can guarantee the protection and rational management of natural and cultural resources.

3.7 Sustainable Tourism Development

Although several definitions of Sustainable Tourism Development STD have been offered in academic research over recent decades, the concept still suffers from a lack of identity. Indeed, some fifteen years ago, Steer and Wade (1993) noted more than 70 different definitions. Additionally, there has been a consistent failure in the tourism literature to relate the concept to the theory (Sharpley, 2002). Most definitions include two common elements, these being the requirement to address present needs and future challenges. According to Hagerhall (1988, cited in Aronsson, 2000), the concept of sustainable development was introduced in the „Our Common Future" report by the World Commission on Environmental Development (WCED), known later as the Brundtland Report. The report suggests that:

- People themselves have the capacity to achieve sustainable development.
- A long-term perspective is necessary; there must be sufficient resources and a good environment for coming generations as well.
- There must be a balance between rich and poor countries, everybody"s basic needs must be provided for.
- We must all, in the rich world in particular, change our attitudes and lifestyles to favour a sustainable ecologically-adapted development.

- Development is a process that can be steered towards sustainability.

Providing a definition of sustainability in that report, the WCED (1987) said it was:

> *Development that meets the needs of the present without compromising the ability of the future generations to meet their own needs. The concept of sustainable development focuses attention on finding strategies to promote economic and social development in ways that avoid environmental degradation, over-exploitation or pollution, and sideline less productive debates about whether to prioritize development of the environment.*
>
> (WCED, 1987, p.1)

According to both Harris *et al.* (2003), and Ham and Weiler (2001), this concept of sustainable development is the most useful. In fact, the WCED went on to produce the first edition of the Journal of Sustainable Tourism, in 1993. Later, in 1996, the UNWTO and WTTC defined sustainable tourism development as:

> *Tourism that meets the needs of present tourists and host regions, while protecting and enhancing opportunity for the future.*
>
> (Sharpley, 2002, p.326)

The definitions provided by the UNWTO, and the WCED are considered by most scholars as the appropriate ones. STD means the development of the tourism industry to ensure its long-term survival within a destination (Butler, 1999, cited in Ioannides, 2001). However, emphasising the importance of economic growth in the development process, Sharpley (2002, p.222) observed that:

> *Despite the evolution of development theory and the present concern with sustainable development, economic growth remains a key element of the development process.*

Clearly, governments have important roles and responsibilities in respect of tourism development, particularly when they have concerns about sustainability issues in less

developed countries (Harrison, 2001). Human and environmental risks are often associated with tourism development, and more attention has been paid to implementing a more sustainable approach to tourism that will prevent destination planners developing the tourism industry without jeopardising the resources on which the industry depends (Hitchock, 1997). In this respect, Aronsson (2000, p.15) argues that:

> *Studying sustainable development is associated with certain difficulties. The term is normative and there is a clear subjective ambition in sustainable development. The term is also relative. There is no absolute sustainable development; rather sustainability can be seen as a process towards something which, from some angles, is more sustainable than what has been before.*

According to several researchers (Bramwell and Sharman, 1999; Burns, 1999; McMool and Stankey, 1999; Sauter and Leisen, 1999; Timothy, 1999, as cited in Ioannides, 2001), destinations that wish to gain STD in any environment, should give all stakeholders the opportunity to participate actively in the decision-making process. This point is effectively made by Yunis (2006, p.9) who observes that:

> *The stakeholders include tourism enterprises, host communities, environmentalists and tourists themselves, but government have a key role to play in providing leadership as the industry is often very fragmented, sustainability relates to areas of public concern and governments hold the tools that can be used to make a differences.*

Without the involvement of stakeholders in planning and decision-making, the achievement of STD will remain a dream for destination managers. It must be acknowledged that local communities represent extremely important stakeholders in the tourism industry, since as observed by McCool and Moisey (2001) if local communities are not involved in the decision-making process and, as a result are unwilling to support a tourism development programme, destination decision-makers are likely to fail to implement and achieve sustainability. Environmentalists form another group of

stakeholders, who have specific concerns about the negative impacts of tourism on the environment. They argue that since tourism enterprises are usually profit-seeking organisations, they should show concern for the environment, and allow tourism resources to be maintained, but this is not always evident. And finally, tourists themselves are stakeholders in STD, since they both pay for, and want to maintain, a high quality experience, services, environment, and culture. Responsible tourists become more aware of their impacts on local environments and communities.

However, despite concerns from all the stakeholders in the tourism industry, there has been little effective implementation of STD. The result, according to Ioannides (2001, p.57) is that the implementation of STD within the context of tourism has failed because "*in most destinations the sector is extremely fragmented and dominated by small businesses*".

Clearly, given this fragmentation and apparent lack of collaboration and co-ordination, it is crucial for governments and international agencies to adopt a more active role in motivating all stakeholders to implement STD approaches. Denman (2006) asserts that STD should aim to achieve; economic viability; local prosperity; employment quality; social equity; visitor fulfilment; local control; community wellbeing; cultural richness; physical integrity; biological diversity; resource efficiency and environmental purity. Presenting a set of conclusions from the Seminar on Tourism Sustainability and Local Agenda 21 in Tourism Destinations (see Table 3.2), (Jeddah, February, 2006). Eugene Yunis, the Head of Sustainable Development of Tourism in UNWTO, offered the following.

Table 3.2: Conclusions from the Seminar on Tourism Sustainability and local Agenda 21 in Tourism Destinations, Jeddah February (2006)

➢ There is evidence of a continued growth and of growing economic importance of tourism in the Middle East and North African region, which calls for enhanced policies and planning in order both to raise the sustainability of tourism and to increase the contribution of tourism to the overall sustainable development of societies.
➢ Various UN/International statements in the last five to ten years support the sustainable development of tourism.
➢ Governments have a key role to lead a participatory process with all stakeholders including the private sector, the local communities, NGOs and other relevant actors.
➢ The sustainability agenda is very relevant to the countries of the Middle East and North Africa. These countries have very fine natural and historic heritage attractions, but they are still not well enough known internationally. The conservation of this heritage is vital for tourism for the future. Many management challenges and solutions are common across the world.
➢ Although there are common challenges and possibly common solutions, we must retain local distinctiveness.
➢ Sustainable tourism is not just about conservation of the physical environment. Many issues we heard during the seminar concerned social and cultural impacts. There is an international tendency to focus increasingly on the social-economic and cultural dimensions of development, balancing them with environmental factors.
➢ The need for governments, non-government bodies, the tourism industry and local people/community to work together.
➢ One of the biggest challenges remains how to get the private sector engaged.
➢ Good practices have been given from Tunisia, Morocco, Jordan and other countries in this region. The experience that can be gained from sharing our ideas and experiences.

Source: Yunis (2006, p.13-14)

The seminar was very important for MENA destinations, not merely as a communication tool with UNWTO, but also to learn how destinations can achieve STD. Moreover, it is also a sort of opportunity for destination mangers to discuss common issues.

The achievement of tourism sustainability requires action on a number of fronts. To begin with, governments can establish minimum standards of performance and policies to protect the environment and minimise environmental impacts (Griffin and Delacey, 2002). Notably, tourism brings considerable economic and social benefits to rural areas through increases in income, and the development and upgrading of infrastructure, although these benefits tend to be less for areas that are already healthy (Roberts and Hall, 2001 cited in Hall and Mitchell, 2005). However, the challenges facing the achievement of STD mean that the emerging tourism destinations of the developing nations are less likely to adopt long-term programmes to protect their tourism resources (Harris *et al.*, 2003).

3.7.1 Economic Sustainability

The tourism industry is a major contributor to national income, employment and tax generation (Mules, 2001). Consequently, it is seen as an appropriate vehicle to aid economic growth in developing countries (Tribe, 2006). For example, tourism contributions account for about 50% of the economic activity of the Bahamas (Conlin and Baum, 1995 cited in Tribe, 2006). Highlighting the potential to assist in this way, the UN has documented that:

> *The tourism industry has the potential to generate foreign exchange earning, create employment, promote development in various parts of the country, reduce income and employment disparities among regions, strengthen linkages among many sectors of the national economy and help to alleviate poverty.*
>
> (UN, 2001, p.1)

Within the MENA region, despite the fact that tourism accounts for less than 3% of the total world tourism market share, the industry nonetheless represents an important sector for most countries, providing an essential source of national income, and generating much-needed employment opportunities. Additionally, tourism plays a significant role in helping some MENA countries reduce their reliance on other sectors of the economy-particularly finite resources such as oil (UNWTO, 2003).

According to Sharpley (2002), the Middle East as a whole has not yet developed as a tourism region, although it possesses a wealth of culture/heritage and natural attractions. Sharpley (2002) added that in recent years many countries in the region have developed a number of non-business related types of tourism, in order to diversify their economies, for example Egypt, Jordan, Tunisia, Oman, Dubai and Morocco, have all followed this route whereas other countries without such vision appear to have no firm objectives for diversification of their economies. However, even where MENA countries have developed successful tourism industries, the situation remains that many challenges are faced in the Middle East, such as the leakage of tourism revenues and benefits into First World multi-national agencies and enterprises (Daher, 2007).

3.7.2 Social Sustainability

The social implications of tourism are more difficult to assess than the economic implications (Cukier, 1998). Hitchcock (1997) pointed out that tourism has a number of dilemmas for local people; on the one hand, it is seen as a job generator and a source of foreign currency through sale of crafts and some social activities such as dancing. On the other hand, tourists sometimes interfere with the daily activities of local people, and they do not always adopt appropriate behaviours e.g. in terms of dress. According to Smith (1989), tourism can be a significant factor in culture change, and can sometimes be problematic for local people, particularly if the host population is extremely poor.

Mason (2008, p.58) indicates that the beneficial impacts of tourism on society include the following:

> *The creation of employment; the revitalisation of poor or non-industrialised regions; the rebirth of local arts and crafts and traditional cultural activities; the revival of social and cultural life of the local population; the renewal of local architectural traditions; and the promotion of the need to conserve areas of outstanding beauty which have aesthetic and cultural value.*

Mason (2008) adds that tourism can offer local communities better jobs and higher wages, but it can, nevertheless, can cause overcrowding, stress, noise, and it may negatively affect other sectors, such as agriculture. According to Curtis (1998 cited in Sigala and Leslie, 2005), tourists may affect the quality of local community facilities and life negatively, increasing pollution, noise, litter, and possibly property prices.

Community participation is a central part of STD (Butcher, 2007). Although local community involvement in decision-making and planning process is crucial in STD

(Murphy, 1991, Pearce *et al.*, 1996, McCool and Moisey, 2001, Harris *et al*., 2002), in this connection, Miller (2001) asserts that in order to achieve sustainable development, locals must be convinced of the benefits of tourism before any progress can be made. Leslie (2005) argues that the community approach requires more time and effort to manage, and could lead to weak management. Moreover, a community approach must ensure a homogeneous community.

As one way of alleviating such a situation, there has been more emphasis placed on different types of tourism, which are believed to be less invasive. Smith and Eadington (1992) for example, report that:

> *In recent years, greater emphasis has been placed on "alternative tourism" recreational activities that pose little threat to the habitats or the societies that are visited. This kind of tourism is supposed to be designed in such a way that it actually enhances the quality of life for the hosts while providing educational benefits to the guests.*
> (Smith and Eadington, 1992 in Hitchcock, 1997, p.94-95)

However, Scheyvens (2002) argues that it is unlikely that all community members will have an equal access to involvement in tourism development and the benefits from it. On this theme, Holder (1996, p.145) observes that:

> *There are some cases where regulation is required, some protection is desirable, and some limits to privatisation and other processes must be set, either to protect the weak or because the benefits of particular process have produced greater negative effects than positive results.*

Pigram and Rugendyke (2002 cited in Pearce and Butler, 2002) note that a commitment to tourism in developing countries is sometimes associated with a loss of control over the allocation of resources and decision-making and with a dependence on a fluctuating

economic base. Clearly, the economic benefits from tourism should be balanced against possible unfavourable socio-cultural implications.

3.7.3 Environmental Sustainability

The travel and tourism industry is currently one of largest industries worldwide, and makes magnificent contributions to many destinations in economic terms, but as already indicated, despite its importance it does have negative impacts on countries and regions. Such unwelcome outcomes include inflation, mass exploitation of resources for quick profits, seasonality of tourism, and the destruction of natural and cultural areas if these are not well preserved and protected (Aronsson, 2000).

There has been little research addressing environmental competitiveness from the managerial perspective, but many projects have been undertaken to minimise the negative impacts of travel and tourism on the environment, and those efforts are marketed under the name of sustainability and ecotourism. Mihalic (2000) notes that tourism theory has recognised the significance of environmental quality, and the importance of protecting it for the future generations, Mihalic (2000) categorises environmental management into four groups, these being: management by codes of conduct; self-developed environmental practice; certified or awarded best practice; accreditation schemes.

As documented by the WTTC, UNWTO, and Earth Council (1996), 182 governments at the United Nations adopted a comprehensive programme on the environment and development called Agenda 21, the Earth Summit in 1992, with the aim of laying the

foundation for securing the sustainable future of the planet. Agenda 21 requires all governments and non-governmental organisations to implement specific actions to ensure success and guarantee the future of the earth. It provides (Agenda 21, p. 34) a framework for STD based on the Rio declaration (WTTC, UNWTO, and Earth Council, 1996).

Not all the Rio declaration (WTTC, UNWTO, and Earth Council, 1996), Objectives are relevant for every organisation/destination and it is left to organisations/destinations to select those that are applicable for them and easy to implement with limited financial resources. However, governments nonetheless have a responsibility to implement Agenda 21 and hence, to support and monitor private organisations in an effort to secure environmentally-sustainable development. There is a clear focus in Agenda 21 on business and industry and their obligation to consider economic, social, cultural and environmental criteria as an integral part in all their management decision- making processes (WTTC, UNWTO, and Earth Council, 1996).

Undoubtedly, tourists have a crucial relationship with the physical environment, which in itself is widely discussed in the tourism literature. Gunn (1994) divided the physical environment into two categories:

1- Natural resources, which include natural water and their biology, flora and fauna of land, the soil, geological formations, climate, and atmosphere.
2- Cultural resources, which include historic sites, other heritage, craftsmanship, traditions, organisations, and settlements.

In addition, the Organisation for Economic Co-operation and Development (OECD) has discussed tourism impacts in more detail, dividing the physical environment into three dimensions, these being: the natural, built, and cultural environments (Puczko and Ratz, 2000). In their discussion of the natural environment, Dolnicar and Leisch (2008, p.672) report:

> *The natural environment represents the main resource for many tourism destinations and tourists are increasingly interested in spending their vacation in unspoilt natural areas. Consequently, destination managers are under increased pressure to implement ecologically sustainable practices. Selective targeting of tourists has been proposed as one approach to sustainable destination management, but the feasibility of this approach remains untested.*

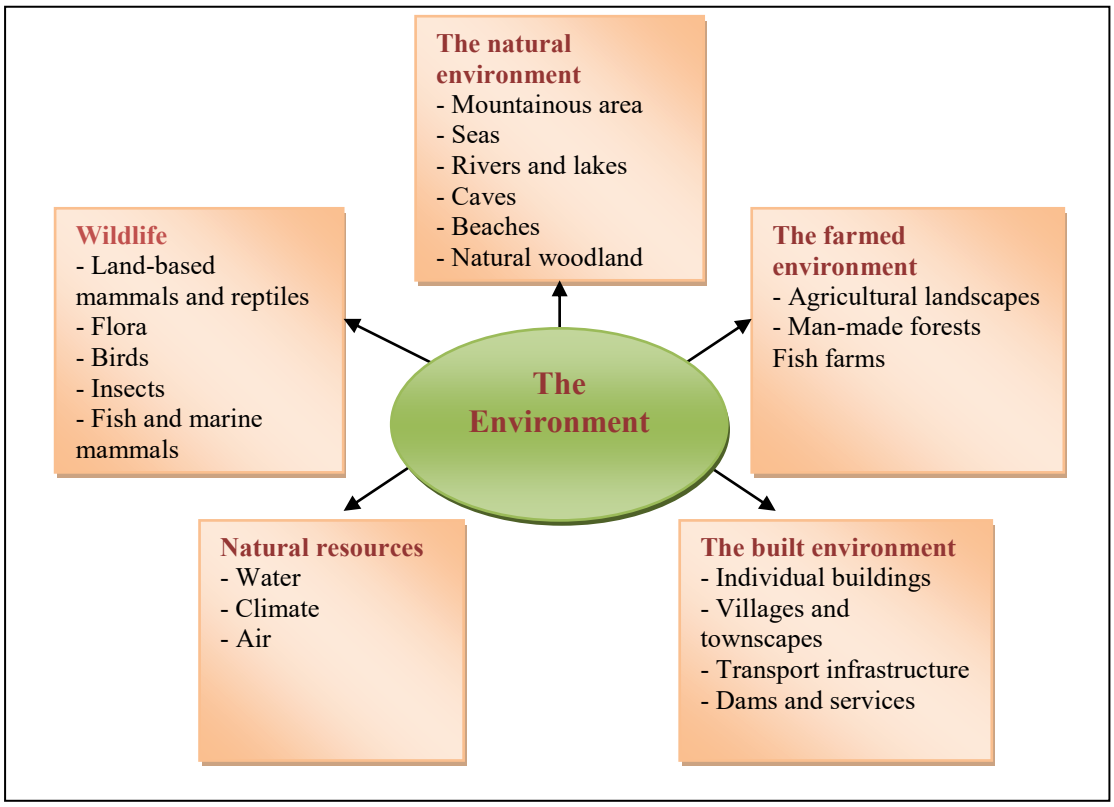
Robinson *et al*. (2000) document one of the main environmental problems as being the increasing pollution in tourism attractions occasioned by the use of cars by visitors to the countryside, and national parks. This is now recognised as a problem throughout many regions, such as North America and Western Europe, and is a factor that has contributed to the increased damage to nature, climate and atmospheric change, acid rain, respiratory diseases, fuel consumption, increased amounts of carbon in the air, and traffic congestion. The United Nations has identified these impacts as a major problem, reporting that:

> *Major environmental threats to the tourism industry have been identified as global warming, loss of biological diversity, and deterioration of a biotic environment (climate, soil, water and air) that nurture biotic components of ecosystems.*
>
> (UN, 2001, p.9)

Swarbrooke (1999 cited in Mason, 2008, p.71) identified five main dimensions of the environment: the natural environment, the farmed environment, wildlife, the built environment, and natural resources (as described in Figure 3.6), arguing that destination

managers should take these five aspects of the environment into account when developing tourism and aim to minimise tourism impacts upon them.

Figure 3.6: The scope of the concept of environment



Source: Swarbrooke (1999 cited in Mason, 2008, p.71)

According to Cooper *et al*. (1993 cited in Lumsdon, 1999, p.284), there is a relationship between the level of demand and magnitude of tourism impacts, which can be balanced by determining the destination capacity. Cooper *et al*. (1993 cited in Lumsdon, 1999, p.284) defined carrying capacity as:

> *The level of tourist presence which creates impacts on the host community, environment and economy that are acceptable to both tourists and hosts, and sustainable over a future time period.*

Godde (1999 cited in McCool and Moisey, 2001) argues that in order to improve environmental conservation and community well-being, government policies should support and involve local communities in planning and decision-making process. According to the International Chamber of Commerce (ICC) (1991), there are two main methods which have been used widely for examining and analysing the environmental impacts of tourism projects, these being the environment audit (EA) and the environmental impact assessment (EIA). The differences between the EA and EIA are that the EA concentrates upon the analysis of the current situation, whilst the EIA looks to the potential consequences of the project in the future. In order to achieve SD, destinations must conduct an EIA for any planned tourism projects, particularly for those that are still in the introductory stage of the tourism product life- cycle (Wood, 2003).

3.8 Destination Competitiveness

Destination competitiveness is associated with globalisation. Due to the influence of globalisation, competition in the tourism field has changed from inter-firm competition to destination competitiveness (Go and Govers, 1999). Hassan (2000, p.240) defined destination competitiveness as:

> *The destination's ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors.*

According to Dwyer and Kim (2003), the concept of destination competitiveness has been considered from different perspectives and various disciplines, with the result that competitiveness is revealed as a multi-faceted concept. These researchers emphasise that competitiveness is associated with three major groups of thought, which are:

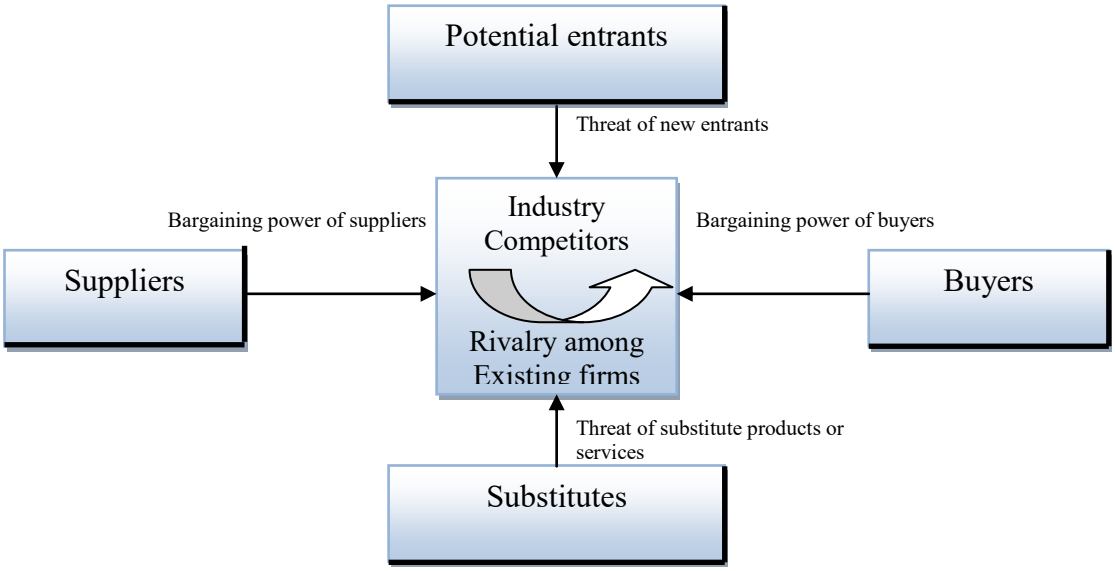
Comparative advantage and/or the price competitiveness perspective (Fakiolas, 1985; Durand and Giorno, 1987; Fagerberg, 1988; Hilke and Nelson, 1988; Porter, 1990; Rugman, 1991; Bellak, 1993; Cartwright, 1993; Hodgetts, 1993; Rugman and Cruz, 1993); A strategy and management perspective (Parsons, 1983; Kogut, 1985; Porter, 1985, 1990, 1999; Porter and Millar, 1985; Ghoshal and Kim, 1986; Day and Wensley, 1988; Peters, 1988; Grant, 1991; Mahmoud *et al*., 1992; Mahoney and Pandian, 1992; Mathur, 1992; Powell, 1992a, 1992b; D"Cruz and Rugman, 1993; Yip, 1998). A historical and socio-cultural perspective (Hofstede, 1980, 1983; Kennedy, 1987; Hofstede and Bond, 1988; Aaker, 1989; Frank *et al.,* 1991; Porter *et al.,* 2001). Ritchie and Crouch (2003, p.2), point out that:

> *What makes a tourism destination truly competitive is its ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations.*

Before going into more detail on the issue of competitive tourism destinations, it is essential to understand the concept of competitiveness in general. Porter (1980) designed a theoretical framework determining the structure of competition between originations within any industry, and in doing so he identified five forces that can threaten any individual firm or industry. These five forces are presented in Figure 3.7 as: industry competitor rivalry among existing firms; bargaining power of buyers; bargaining power of suppliers; threat of new entrants; threat of substitute products or services.

While Porter (1980) focuses on competition in general, his framework can be applied to any organisation or industry, which as he notes, will show variations in the strength of the five forces depending on the characteristics that are peculiar to it. In the Libyan case, the tourism competitors are Jordan, Egypt, Tunisia, and Morocco; the potential entrants are destinations that have a chance to become successful tourism resorts in the MENA tourism market, like Algeria and Lebanon; tourism suppliers are organisations which provide the tourism industry with goods and services, including labour, airlines, hotels, resorts, sponsors of festivals and events; and the buyers are the visitors and tourists whose perceptions and attitudes have an impact on the travel decision-making process.

Figure 3.7: The five competitive forces determining industry profitability



Source: Porter (1985, p.5)

According to Poon (1993 cited in Ritchie and Crouch, 2003, p.25), competitive strategies are critically important because:

1- *Comparative advantages are no longer natural.*
2- *Tourism is a volatile, sensitive and fiercely competitive industry.*
3- *The industry is undergoing rapid and radical transformation - the rules of the game are changing for everyone.*
4- *What is at stake is not just tourism but the survival of tourism-dependent economies.*
5- *The future development and viability of tourism-dependent economies will depend not only on tourism, but on the entire service sector.*

Hassan (2000, p.240) reports that:

> *Achieving the goals of sustainable development will require sophisticated planning and development strategies coupled with the involvement of all stakeholders, including public/private sector authorities, environmental groups, and local communities.*

3.8.1 Dimensions of Destination Competitive Advantage

Competitive advantage explains the concept of the value chain, and provides a general framework of strategic thinking about organisations‟ activities, assessing their success in relation to cost efficiency and differentiation (Porter, 1985). However, destination competitive advantages focus on the strengths and performance the destination‟s economic, political, social, cultural, technological, and environmental dimensions. Figure 3.8 depicts multi-dimensional strengths of a tourism destination.

Figure 3.8: Multi-dimensional strengths of a tourism destination

Source: Adopted from Porter (1985)

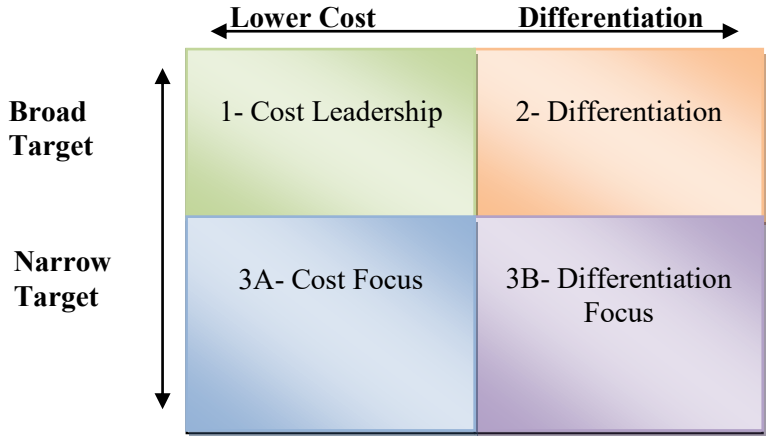
In their commentary on tourism dimensions, Ritchie and Crouch (2003) consider the micro and macro-environment, asserting that these have direct and sometimes indirect influence on destinations. For instance, government regulations, political changes, local residents‟ attitudes, and prices all play a part in making a particular destination favourable or otherwise in the eyes of potential travellers.

3.8.2 Destinations' Generic Competitive Strategies

Positioning is an important element in destination marketing; destinations have a number of competitive strategies that they can adopt to compete in the global tourism marketing environment. Porter‟s (1985) framework is regarded as the best approach for gaining competitive advantage. This indicates that positioning determines whether a firm‟s profitability is above or below the industry average. Porter (1985) identified two basic types of competitive advantage, lower cost and differentiation, and added to these

a consideration of the scope of activities (target market) and he argued that through these - cost leadership, differentiation, and focus – firms can achieve above average performance in an industry (Figure 3.9).

Figure 3.9: Porter's Generic Strategies



Source: Porter (1985, p.37)

Destinations that sell their tourism products cheaply and serve the whole market can position themselves as cost leadership destinations, and Egypt is recognised as one such destination in the MENA tourism market. In addition, Ansoff developed a matrix demonstrates that destinations have four competitive strategies based on product or market development, Ansoff matrix will be discussed later in chapter four.

3.9 Destination competitive models

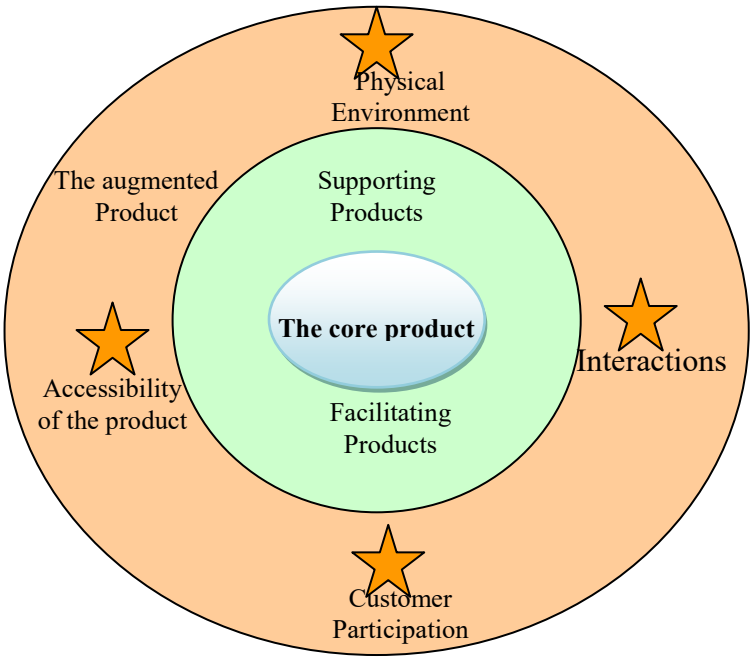
Competition in the tourism market is vital, destinations spend a lot of money and invest heavily in tourism to diversify their economies and seek alternative sources of national income, but little attention has been paid to the approaches of gaining competitiveness. Several models have been developed for destination competitiveness and some of them seem to be more theoretical than practical, moreover, due to the differences in

destination environments and situations, not every model can apply for every destination, for instance a model appropriate to the UK may not fit the Libya context. According to Ritchie and Crouch (2003) a conceptual model is a tool that provides a useful way of thinking to understand a complex issue. There are a number of destination competitiveness models discussed in the tourism literature, the most important and relevant being Gronroos (1987), Poon (1993), Hassan (2000), Ritchie and Crouch (2003), Dwyer and Kim (2003) and Jones and Haven-Tang (2005).

3.9.1 Gronroos Model

Gronroos (1987) cited in Kotler *et al.* (1996, p.277) advised hospitality and tourism managers need to think about their product or service on four levels: core product, the facilitating product, the supporting product and the augmented product as illustrated in Figure 3.10.

Figure 3.10: Product and service competitive advantage



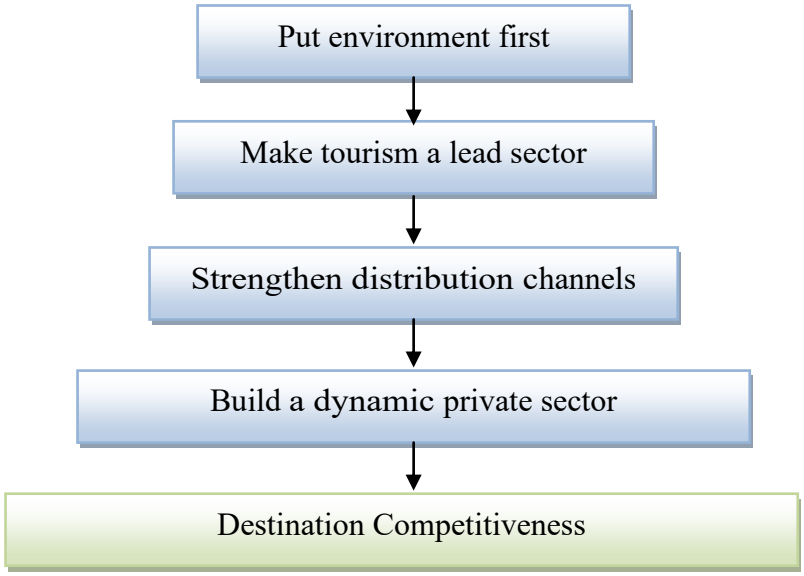
Source: Gronroos (1987 cited in Kotler *et al.,* 1996, p.277)

The core product is what the organisation has to offer for the customer, where facilitating products are those goods or services that should present for the customer to use the core product. Supporting products are other products offered to add value to the core product. The augment product includes four elements, accessibility, physical environment (atmosphere), customer participation, and customer interaction with each other. On one hand it consists of the main elements of tourism industry which are core product, facilitating product, and supporting product, on the other hand the model considered physical environment as the augmented product, which ignored the other important unphysical environments such as the culture, and the threat of competitors, and the model is more applicable for a single product or service rather than marketing nation destination.

3.9.2 Poon's Model

Poon (1993) suggests four strategies to achieve destination competitiveness: 1) it is necessary to consider the environment as the main priority, 2) tourism should be a lead sector, 3) a strong channel distribution in the marketplace should be built up, and 4) a dynamic private sector should be constructed, as illustrated in Figure 3.11.

Figure 3.11: Poon's Model



Source: Poon (1993)

The environment becomes a critical issue in developing tourism, but where tourism contributions to GDP are expected to be not more than 10 per cent for example, then tourism cannot be considered a leader sector. Also even when the destination has implemented effective channel distributions, there is no guarantee of gaining competitiveness without good destination management, and attractive core resources, even though we suppose the supporting facilities will be provided by the private sector, moreover, the model is missing the coherent, and the link between the channel distributions and building private sector is not convincing.

3.9.3 Hassan's Model

Hassan (2000) designed a new model of competitiveness, focusing on the environmental sustainable factors associated with travel destinations. He argues that:

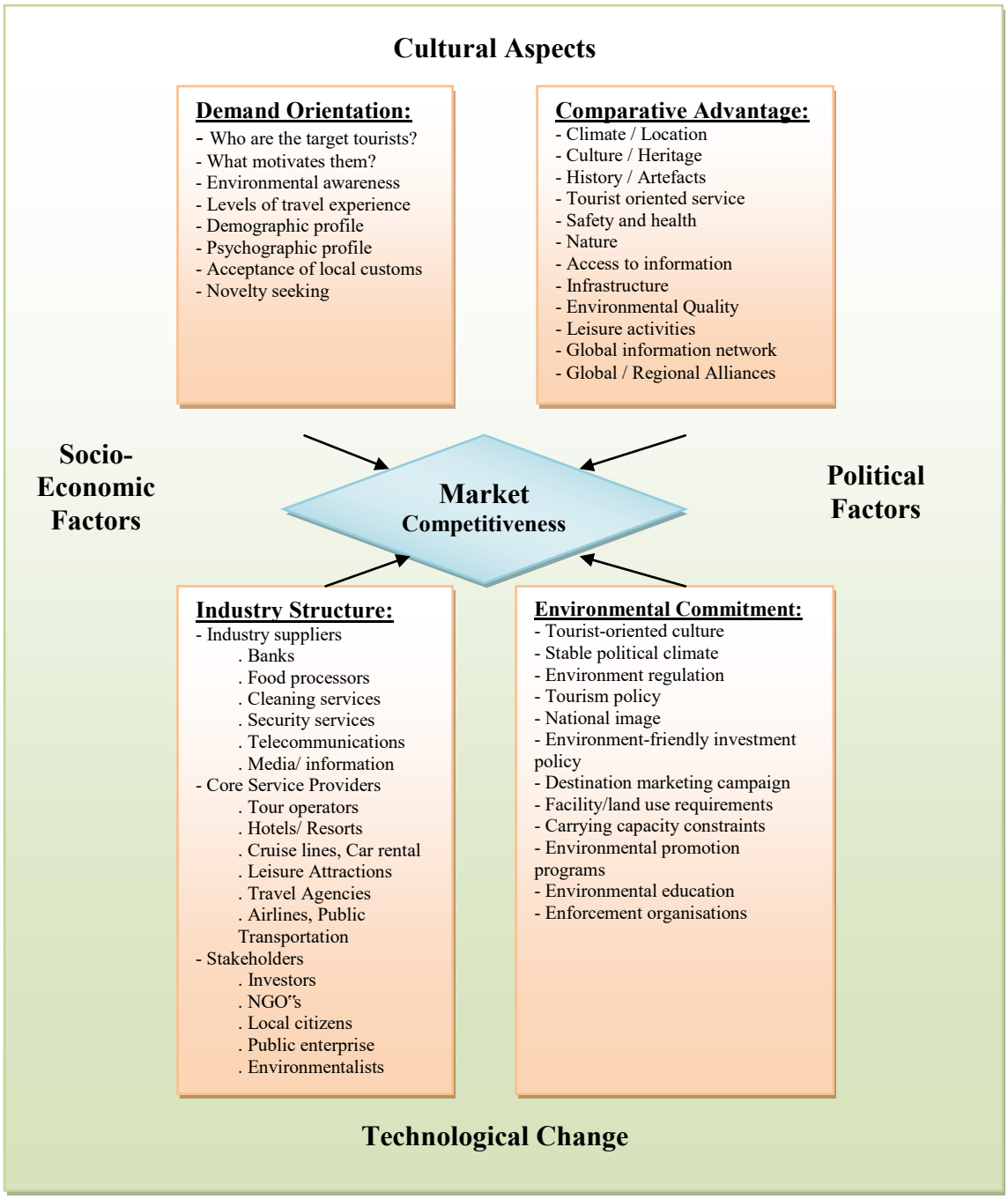
> *In an increasingly saturated marketplace, the development and promotion of tourism destinations must be guided by analytical*

> *frameworks that focus on the concept of competitiveness. Most competitiveness models have focused on the firm as a unit of analysis for wide variety of industries.*
>
> (Hassan, 2000, p.239)

Hassan (2000, p.242) asserts that the strategic framework focuses on four major determinants of market competitiveness (see Figure 3.12): comparative advantage including factors associated with both the macro and micro environments that are critical to market competitiveness; demand orientation-the destination‟s ability to respond to the changing nature of market demand will influence its competitiveness; industry structure or the existence or absence of an organised tourism-related industry structure can be associated with the destination‟s ability to compete; environmental commitment: the destination‟s commitment to the environment will influence the potential for sustained market competitiveness.

Hassan‟s model includes the most important elements; he assumed that the demand orientation, comparative advantage, industry structure and environmental commitment are the core source of destination competitiveness. But it can be argued that Hassan‟s model does not consider national image as a demand orientation; also tourist oriented culture and stable political climate are external factors of tourism destinations.

Figure 3.12: Determinants of market competitiveness in an environmentally sustainable tourism industry



Source: Hassan (2000, p.241)

3.9.4 Ritchie and Crouch Model

Ritchie and Crouch (2003) developed a framework for destination competitiveness. It is a complex model but it seems more reliable for destination marketers and managers, it gives outline guidance of how a destination can take a comparative advantage over other destinations, also determining the strengths and weakness points of the tourism industry.

Ritchie and Crouch (2003) explain that their model can be applied for many purposes, including academic research, and applying the model in fact depends on the destinations circumstances and it is environment. Otherwise, Ritchie and Crouch (2003, p.60) state that:

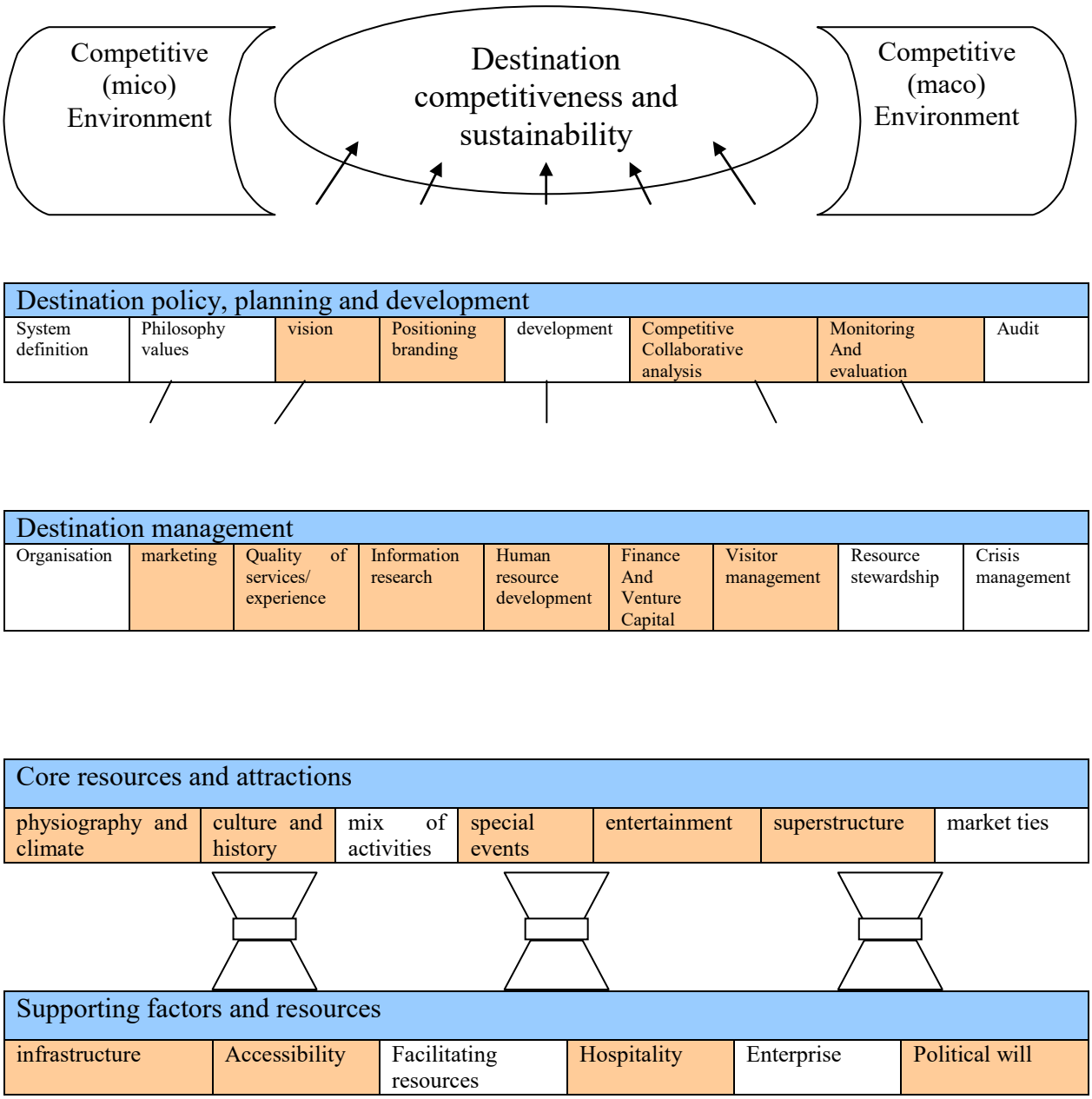
> *It is important to recognise that models are not perfect and therefore should not be used in a cookbook fashion.*

Beeton critically reviewed Ritchie and Crouch"s model and she suggests that:

> *It would be interesting to test Ritchie and Crouch's model in developing countries. I feel that as a framework it will stand up and actually provide some areas for comparison, and while they stress early on the book that the model has not been developed as predictive, may provide some pointers to the future of tourism in our developing nations.*
>
> (Beeton, 2005, p.294)

The Ritchie and Crouch (2003) model consists of five components, which are core resources and attractions, supporting factors and resources, destination policy, planning and development, destination management, and qualifying and amplifying determinants as illustrated in Figure 3.13.

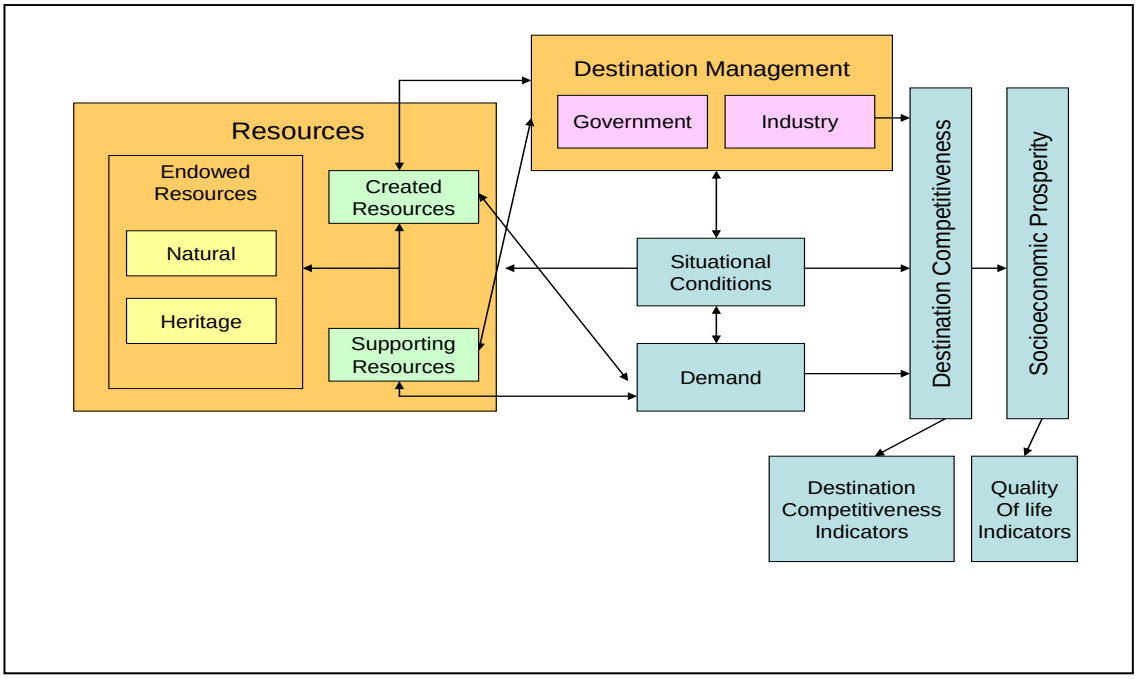
Figure 3.13: Ritchie and Crouch (2003) Model



3.9.5 Dwyer and Kim Model

Dwyer and Kim (2003) developed another model for destination competitiveness; they discussed the previous models including Poon (1993), Hassan (2000), and Crouch and Ritchie (1995, 1999, 2000) in particular. The Dwyer and Kim (2003) model focuses on the main elements of destination competitiveness, which include the resources, destination management, situational conditions, and demand side as show in Figure 3.14. They classified tourism resources into four resources which are: natural, heritage, created resources, and supporting resources, also destination can be managed through two operators the government and the industry. The model results to gaining destination competitiveness and improving the quality of life for local communities.

Figure 3.14: The main elements of destination competitiveness



Source: Dwyer and Kim (2003, p.378)

Dwyer and Kim (2003, p.372) argue that:

> *The discussion of competitiveness in the general literature has tended to stress competitive advantage (resulting from value-added activities by firms and organisations), while de-emphasising comparative advantage as a source of international competitiveness.*

Dwyer and Kim (2003, p.372) added that destination comparative advantage consist of inherited or endowed resources (such as climate, scenery, flora and fauna), whereas competitive advantage includes created resources (such as the tourism infrastructure, accommodation, transportation, festivals and events, the quality of management, skills of workers and government policy).

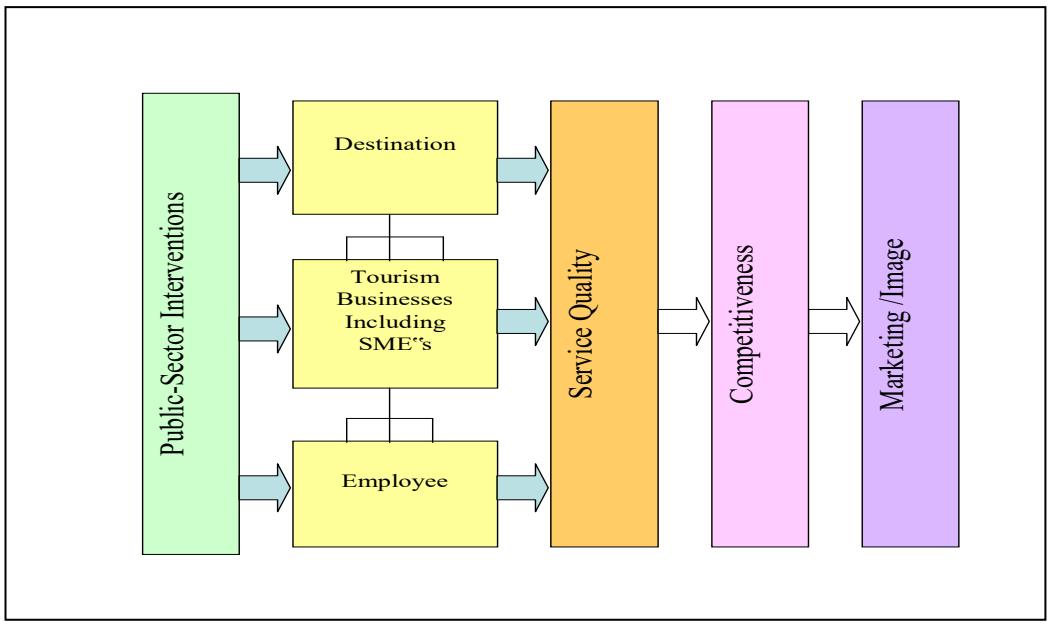
Although Dwyer and Kim (2003) attempted to provide an effective and comprehensive model, their model falls down in several ways. First the model does not show the start point of the model, the linkage among the elements confusing for example there are many arrows lead to gain destination competitiveness, the process is not clear, moreover, the model did not include some important elements such as (service quality, local communities).

3.9.6 Jones and Haven-Tang Model

The Jones and Haven-Tang"s (2005) model considers a destination as a hierarchy of entities (destination, tourism businesses including SMEs and employee) integrated together with both public-sector interventions, which play a main role as a supporter for strategic development of the destination, these integrated elements result not merely to build a coherent destination image in the tourists perception, but support destination managers to implement a good destination management plan (see Figure 3.15).

Tourism products have unique characteristics and fundamentals, and service quality is the key to competitive advantage, however, there is a link between service quality and investment returns, costs, productivity, sales growth, price, customer satisfaction and loyalty (Jones and Haven-Tang, 2005). Jones and Haven-Tang highlighted the importance of destination SMEs in gaining competitive advantage; they assert the responsibility of the public-sector (the government) to develop the private sector which ultimately enhances service quality. However, marketing activity and destination image emerge as a result of the process of service quality and competitiveness.

Figure 3.15: Modelling the role of SMEs in service quality and destination



Source: Jones and Haven-Tang (2005, p.3)

3.9.7 Sustainable competitiveness through Integrated Quality Management (IQM)

According to Go and Govers (1999) private and public operators have become a major interest of quality management in the emerging globalisation. Quality deserves adopting a comprehensive approach and a definitive integration of its key stakeholders" including residents, visitors and trade, and identification of their needs and expectations.

The term IQM is an extension to the term TQM, and IQM is tourism oriented whereas TQM is applied to business organisations in general. Therefore understanding TQM will lead us to understanding IQM. According to the American Federal Office of Management (AFOM), TQM is defined as:

> *A total organizational approach for meeting customer needs and expectations that involves all managers and employees in using quantitative methods to improve continuously the organization's processes, products, and services.*
>
> (AFOM cited in Psychogios and Priporas, 2007, p.47)

In contrast, the European Commission (1999, p.11) defined IQM as:

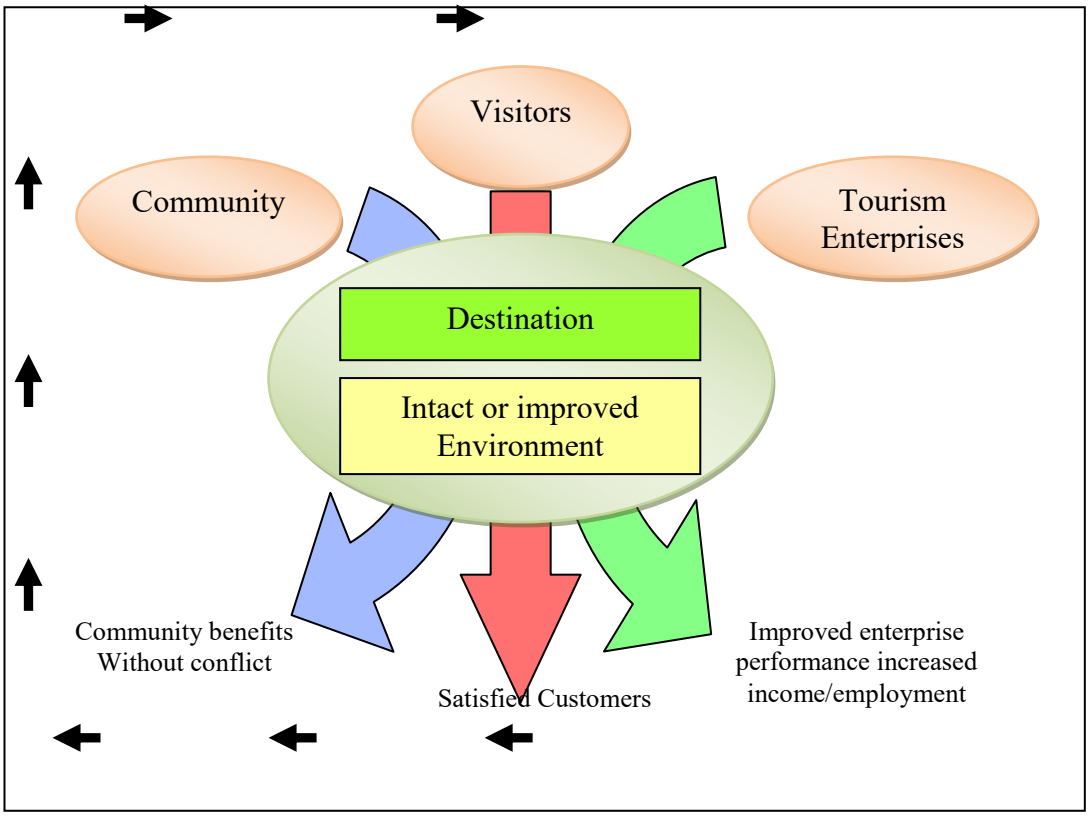
> *an approach to managing a tourism destination which focuses on an ongoing process of improving visitor satisfaction, while seeking to improve the local economy, the environment and the quality of life of the local community.*

IQM is an European-led imitative, however, IQM is a tool for delivering internal and external quality within a tourism destination. Internal quality focuses on the quality and value that visitors receive prior going back home. External quality is the development of sustainable tourism including environment, natural resources heritage and culture (Welsh Assembly Government, 2005). EFQM (2000, p.8) argues that IQM should not be seen as a route to instant success, rather it leads to the following key benefits:

- *More local awareness and support for tourism generally in the destination.*
- *Better co-ordination between local tourism enterprises themselves, and greater support for, and involvement with, the management and marketing of the destination.*
- *An improved image of the destination which is real and not based on false expectations.*
- *Increased customer satisfaction, with more repeat business and recommendations.*
- *Better knowledge of the economic, social and environmental impacts of tourism and ability to adjust for them.*

The IQM concept has developed to provide practical recommendations for the core stakeholders of tourism destination, which are visitors, tourism enterprises and local communities as described in the following Figure 3.16.

Figure 3.16: Main stakeholders of IQM



Source: European Commission (1999, p.11)

The philosophy of IQM depends upon improving the quality at all stages of a tourist‟s visit. This improvement should reflect directly to community benefits, tourists‟ satisfaction and tourism businesses achieving its goals. However, governments and public-sector are responsible for implementing and monitoring the process of IQM.

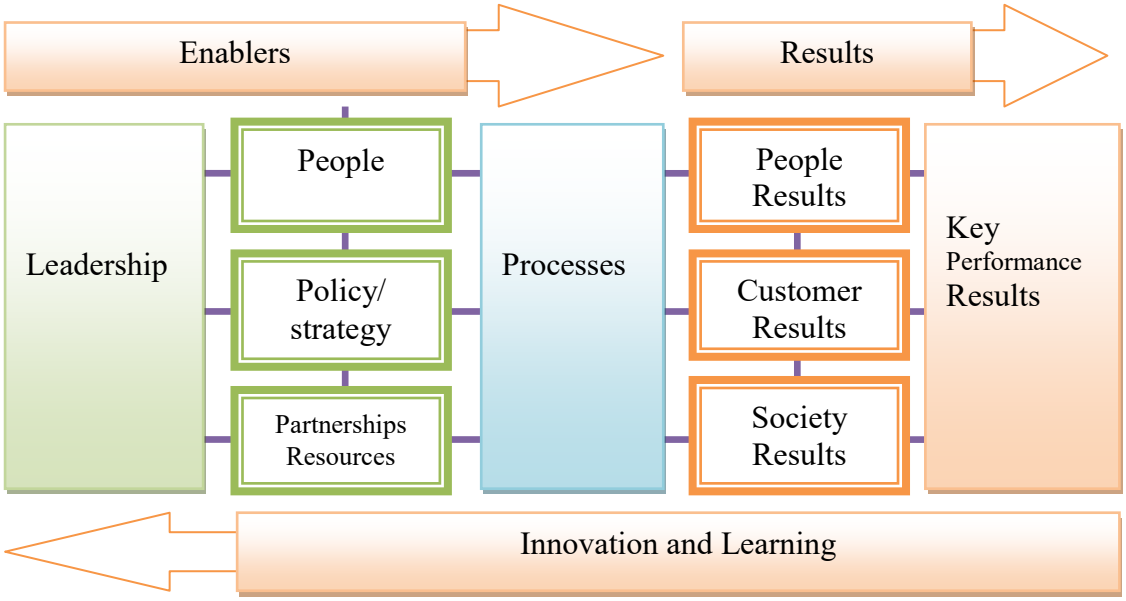
> *Integrated quality management (IQM) should simultaneously take into account, and have a favourable impact on the activities of tourism professionals, tourists, the local population and the environment (that is the natural, cultural and manmade assets of the destination). The integrated quality management strategy implemented in destinations must have the requirements of tourists as one of its major considerations.*
> (European Commission, 1999, p.10)

Whilst, destination managers on one hand are concerned about increasing local income and employment through tourism, and on the other hand taking into account the environment and local community considerations. Therefore, IQM can achieve these objectives by improving the visitors‟ satisfaction and considering the impacts on local environment and communities (European Commission, 1999).

3.9.8 European Federation Quality Model (EFQM)

The EFQM model is one of the most widely-used organisational frameworks for managing quality in Europe. The model was first introduced in 1993 and revised in 2003 (British Quality Foundation, 2005). According to Quality Scotland the excellence model is a non-prescriptive framework which can be used as a diagnostic tool and allows more flexibility for any type of organisations to adopt EFQM. The EFQM is based on nine criteria, five of those criteria are enablers where the other four criteria are results (see Figure 3.17).

Figure 3.17: The EFQM excellence model



Source: EFQM (2003, p.2)

The EFQM explains how organisations can achieve their goals and strategies through the satisfaction of the people, customers and society. The framework considers individual organisations, such as hotels and tour operators, rather than being developed for nation destinations where the process is more complex, also it can be argued that people are part of the society.

3.10 Summary

This chapter has critically reviewed literature relating to sustainability and destination competitiveness. It considered the concept of SD, revealing that whilst tourism represents a welcome source of national income and job opportunities for most tourism destinations, it does on the other hand, have negative impacts on the economy in terms of increased inflation and seasonality, and on society in respect of the crime rate, and on the attitudes and behaviours of local communities and needs to be carefully managed.

From these it is apparent that there are effects both upon the host culture and the local environment. The chapter also highlighted the TBLS in relation to economic, socio-cultural and environmental agendas. Finally, it has addressed the concept of destination competitiveness, highlighting the dimensions of destination competitive advantage, and destination generic competitive strategy. A consideration of these concepts has provided a breadth of knowledge and understanding in respect of how a destination might compete or survive in the increasingly competitive environment that is the international tourism market. This chapter also discussed the destination competitive models, including IQM and EFQM; these competitive models provide the researcher a wide scope of knowledge and background to develop a Sustainable Competitive Destination Model (SCDM).

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Chapter 4: Sustainable Competitive Destination Model

4.1 Introduction

Competition between destinations is becoming more intense and its influence extends not merely to international organisations but has significant pressure on local firms as well. Destination managers must consider competition very seriously, particularly with a further increase in the globalisation phenomenon.

> *Markets are becoming increasingly competitive and organisations must therefore strive constantly to find new ways of achieving competitive advantage.*
>
> (Horner and Swarbrooke, 1996, p.395)

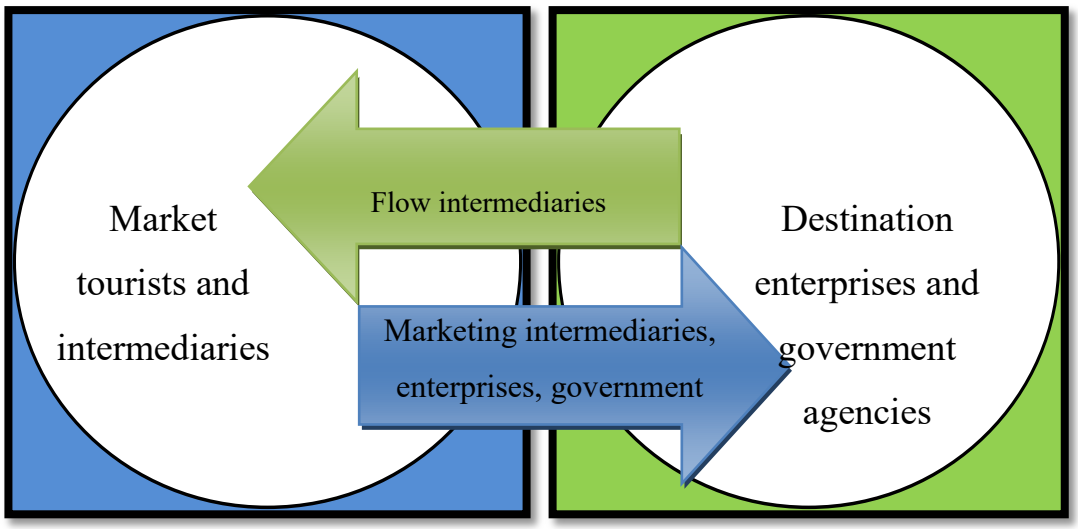
This chapter discusses the development of a Sustainable Competitive Destination Model (SCDM) appropriate to the Libyan context. Building the SCDM goes through many stages, commencing with the ideas of Leiper (1979), and ending with the final SCDM which takes into account previous destination competitive models which are identified in Chapter Three, adopting the strengths of each. The SCDM includes the most important issues and elements of destination competitiveness, such as destination image and accessibility, tourism product (comparative advantage, supporting resources), local communities, destination management, and how all these elements should be integrated to deliver quality services. The model provides guidelines on how destinations, particularly new ones, can compete effectively and efficiency in the international tourism market, and maximise their market share. The reader should note that the SCDM is suitable for national destination rather than regional destinations.

According to Mason (2008), tourism can have positive impact on the development of social, economic and environmental aspects of any country. The model is designed to achieve sustainable economic, social and environmental developments and avoid negative impacts of tourism, through involving all tourism stakeholders in a systematic model. Due to the significant role of some elements, the SCDM addresses those elements in more detail, including destination image, branding and management.

4.2 Tourism systems

According to Foster (1999), despite the idea of systems having been interpreted and applied in many different areas of research, there are few applications of a systems approach in tourism studies. Foster (1999) points out that Leiper (1979); Mill and Morrison (1985) and Gunn (1988) are the pioneers who emphasised a systematic approach to link the relationship between a tourism destination and its tourist market. As presented in Figure 4.1 there is interaction between demand and supply factors, in this context, tourists attracted through marketing intermediaries, enterprises, government agencies, on the other hand intermediaries provide the required services to facilitate the tourists‟ flow and satisfaction.

Figure 4.1: A tourism system



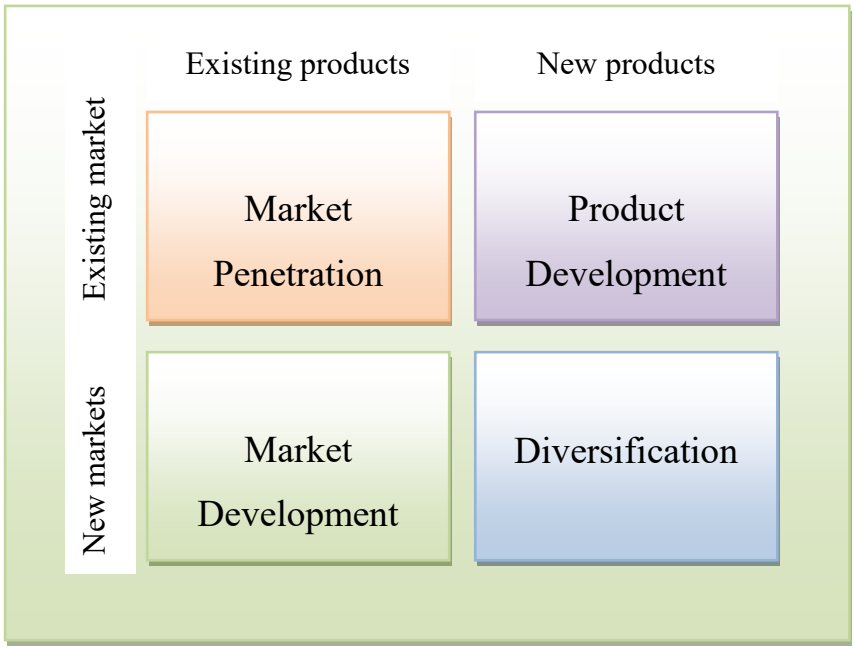
Source: (Leiper, 1979 cited in Foster 1999, p.14)

Leiper"s (1979) framework provided the researcher with the initial knowledge of understanding the systematic approach between tourism destination and tourist markets. Leiper"s idea was used as the foundation for developing the Sustainable Competitive Destination Model (SCDM).

4.3 Tourist market (Demand side)

The demand side focuses on the tourist target market, which can be a country (such as the UK), a region (e.g. the EU), or a continent (such as North America or Australia). Destinations also can focus on a particular market segment to target a geographical area. National destinations must identify their target markets by analysing market trends and international arrivals statistics annually and planning for entering new potential markets or expanding existing markets. In this regard, Ansoff developed a useful growth matrix, which was first published in the Harvard Business Review in 1957 (Hussey, 1999). The matrix can help business decision makers adopt one of four different strategies based on the product and markets as presented in Figure 4.2.

Figure 4.2: Product and market development (Ansoff matrix)



Source: Chapman (2009, online)

According to the Ansoff matrix, destinations have two options for marketing their existing tourism product, first by focusing on the existing markets, (i.e. a market penetration strategy), or by searching for new potential markets (a market development strategy). However, destinations may develop new product for existing markets (product development), or for new markets (a diversification strategy).

Entering a new market is not simple task. Many scholars, such Baloglu and McCleary (1999) point out that destination image in target markets is a crucial factor, and destinations mostly compete to enhance their images in the mind of potential tourists. According to Reich (1999) and Sonmez and Sirakaya (2002) a clear understanding of tourists‟ perceptions is important for sustainable destination development. Competing in the international tourism market requires destination marketing and promotion efforts to

draw a positive and attractive image of the destination from the perspective of potential tourists. Hence, the follows is a detailed discussion of destination image, destination image components and formulation.

4.3.1 Tourism Destination Image (TDI)

Since the first Tourism Destination Image (TDI) research was conducted, the topic has become one of the most recognised in the tourism literature as destinations often compete only via images (Pike and Ryan, 2004). Baloglu and McCleary (1999, p.144) states that:

> *Destination image is a valuable concept in investigating the destination selection process and has contributed to our understanding of tourists" behaviour.*

According to Gallarza *et al.* (2002), many authors agree that TDI research has emerged from Hunt"s work of 1971. The definition, however, of destination image is problematic and has a variety of different interpretations (O"Leary and Deegan, 2005). Before going further it is essential to clarify and understand the meaning of the concept of TDI as defined by different researchers. Table 4.1 reviews some common definitions of destination image.

Table 4.1: Selected definitions of destination image

Hunt (1971): i*mpressions that a person or persons hold about a state in which they do not reside.*
Markin (1974): o*ur own personalized, internalized and conceptualizing understanding of what we know*.
Lawson and Bond-Bovy (1977): *an expression of knowledge, impressions, prejudice, imaginations and emotional thoughts an individual has of a specific object or place.*
Crompton (1979): a*n image may be defined as the sum of beliefs, ideas, and impressions that a person has of a destination.*
Dichter (1985): *the concept of image can be applied to a political candidate, a product and a country. It describes not individual traits or qualities but the total impression an entity makes on the minds of others.*
Reynolds (1985): *an image is the mental construct developed by the consumer on the basis of a few selected impressions among the flood of total impressions. It comes into being through a creative process in which selected impressions are elaborated, embellished and ordered.*
Fakeye and Crompton (1991): *image is the mental construct developed by a potential tourist on the basis of a few selected impressions among the flood of total impressions.*
Kotler *et al.* (1994): *the image of a place is the sum of beliefs, ideas, and impressions that a person holds of it.*
Gartner (1993): *destination images are developed by three hierarchically interrelated components: cognitive, affective, and conative.*

Source: Gallarza *et al.* (2002, p.60)

According to Gunn (1972, cited in Baloglu and McCleary, 1999, p.869), the initial image formation stage undertaken before visiting a place is a crucial phase in tourists" destination selection processes. Hunt (1975) pointed out that tourists act upon their images, beliefs and perceptions about certain destinations rather than objective reality:

> *Images are more important that tangible resources, because perceptions, rather than reality are what motivate consumers to act or not act.*
> (Guthrie and Gale, 1991, cited in Gallarza *et al.,* 2002, p.57)

Echtner and Ritchie (2003) suggest that destinations must be favourably differentiated from their competitors or have a positive image in the minds of potential consumers. It can be understood that destinations that create such positive images are more likely to be selected to be visited from their competitors. However, destinations with negative

images or less widespread awareness in the minds of tourists will be avoided, even if in reality they are pleasant or attractive places to visit.

> *In the case of the Arab world, the basis of the images and ideologies used and expressed, pre-perceptions, knowledge and pseudo-knowledge of countries and cultures, is formed prior to travelling, which in turn frames the tourists" perceptions and prejudices during their stay.*
> (Al-Mahadin and Burns,1998, cited in Weir, 2007, p.1103)

Baloglu and Mangaloglu (2001) assert that destinations basically compete on their perceived images relative to competitors in the marketplace. TDI research is increasing recently, but this field has paid little attention to particular regions such as the Middle East (Schneider and Sonmez, 1999; Weir, 2007). Schneider and Sonmez (1999) added that the mass media plays a critical role in destination image formation, particularly in relation to Middle Eastern destinations, due to their reputation of being regions of conflict and turmoil. Hence, successful destinations must build a strong and positive image, particularly bearing in mind the increasing global competition. It can be seen that previous researchers have defined destination image from the same perspective. They have concentrated on three main elements: perceptions; tourists; destination or area.

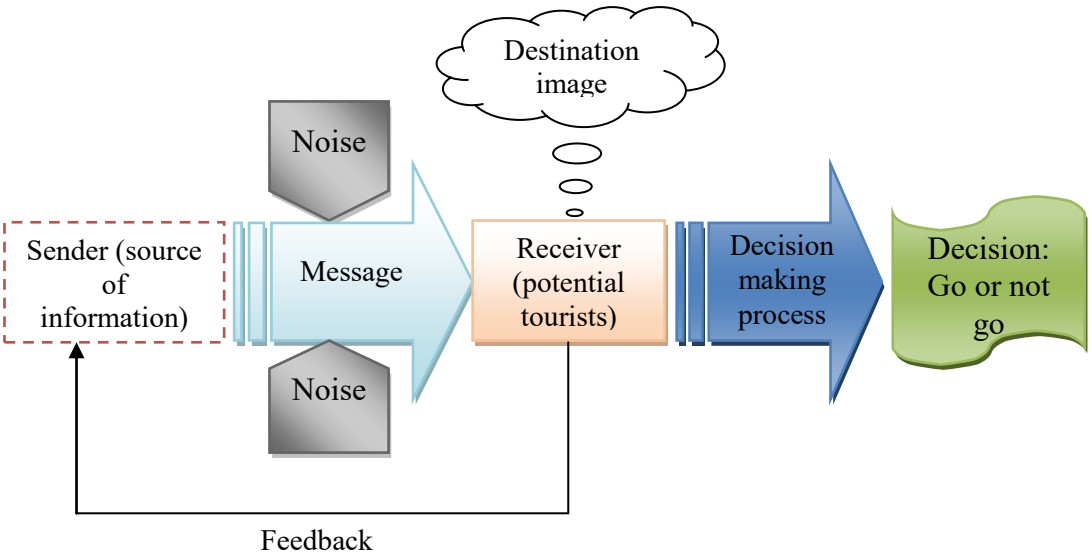
However, other researchers defined destination image in more specific details. Echtner and Ritchie (2003) note that destination image can be considered in terms of both an attribute-based component and a holistic component. They conducted a comprehensive survey of the definitions of destination image in 1991 and concluded that many of those definitions were quite vague, and in several cases, were not even explicitly stated.

White (2004) suggested that the conceptualisation and operationalisation of image as a construct was fragmented and incomplete. He argues that many scholars have cited in numerous definitions of "image" but that they do not reflect the meaning of image conceptualisation. Gensch (1978) states that many studies have assumed that image has a significant role in product situations, but individuals may have difficulty in obtaining objective measures on important product attributes. As a tourism product it requires subjective judgments rather than objective measurement and it cannot be tried or tested out before visiting. Potential tourists therefore, have limited knowledge about their potential destination as they have not visited yet.

Destination image components

Gunn (1972; 1988) conceptualized destination image using two dimensions: organic (which is always highly personal, accumulated throughout much communication input during a lifetime and including materials such as newspapers, periodicals, and books), and induced (which derives from conscious efforts of development, promotion and advertising including magazine articles, guide books, television promotions, travel tour packages and promotions by travel businesses). Gunn argued that destination designers and developers cannot do much with organic images, but can influence or change induced images. Individuals have one stored image in their minds about a certain object, with this image being constructed and built throughout their life history. Each piece of information or message received adds to or modifies that image (see Figure 4.3).

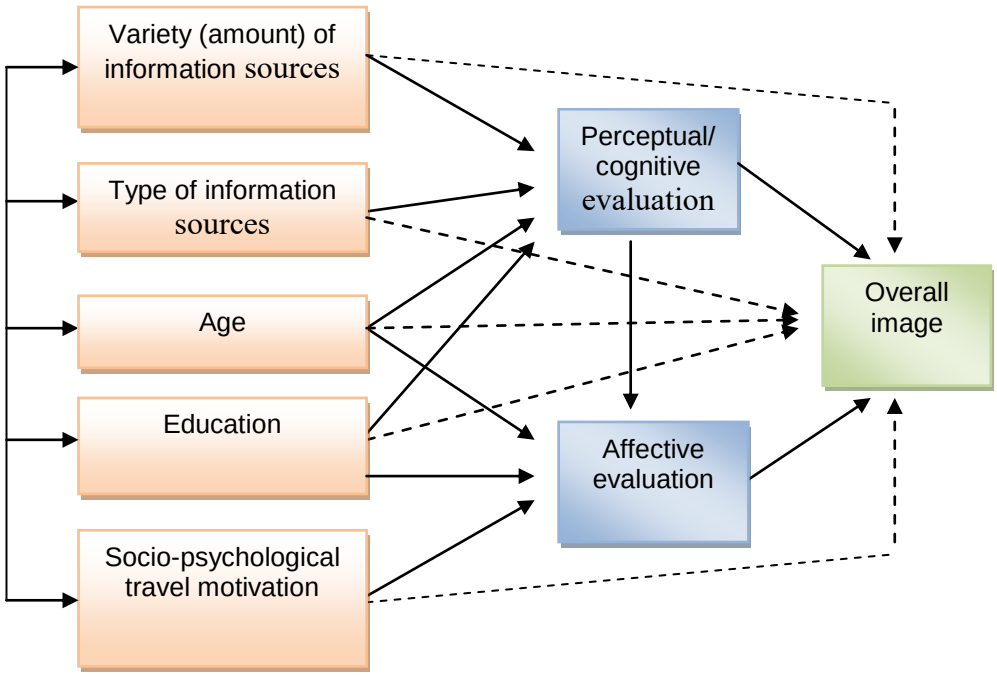
Figure 4.3: Image constructs and building process



Based upon the work of Duncan (2005, online)

A number of researchers assert that destination image consists of two components: cognitive and affective (Walmsley and Jenkins 1992; Baloglu and Brinberg 1997; Baloglu and McCleary 1999; Yoon and Kim, 2000). Cognitive image refers to beliefs and knowledge about an object (or destination), whereas an affective image deals with the feelings about it. Baloglu and McCleary (1999) developed a model of the determinants of TDI before an actual visitation as illustrated below in Figure 4.4.

Figure 4.4: Model of the determinants of TDI



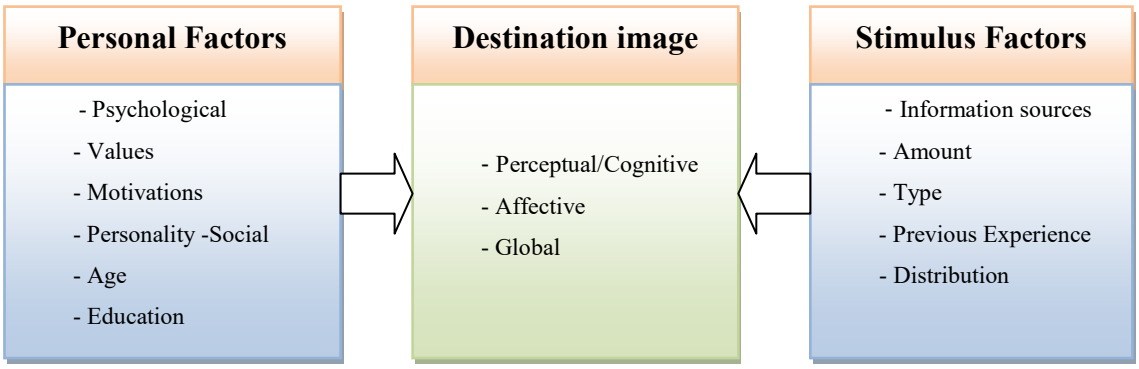
Source: Baloglu and McCleary (1999, p.871)

Baloglu and McCleary"s (1999) model consists of two image components cognitive and affective or evaluation, cognitive image is influenced by many factors, such as amount and type of information, the age and level of education of a potential tourist, where age, education and socio-psychological travel motivation have impact on the affective image. However, other scholars see that destination image consists of three components: cognitive, affective, and conative (Myers, 1992; Pike and Ryan, 2004), describing the conative component as the attributes that relate to the behavioural attitudes. Baloglu and McCleary (1999) suggest that destination marketers must understand how an image is formed and what determines the process.

Destination image formation

Chon (1990) states that a traveller‟s decision to travel to the destination (or not) is linked to the destination image in the traveller‟s mind and perceptions. Thus analyses of the image formation process are crucial to enable tourism planners and marketers to influence and change potential tourists‟ perceptions. Numerous tourism researchers have discussed the importance of understanding factors which influence image development and note that little effort has been paid to determine which forces affect the image being promoted and how it determines which segment and which target market. According to Baloglu and McCleary (1999), image is mainly caused or formed by two major forces: personal factors and stimulus factors (see Figure 4.5). Personal factors are related to the characteristics of the person whereas stimulus factors are linked to the image itself.

Figure 4.5: General Framework of Destination Image Formation



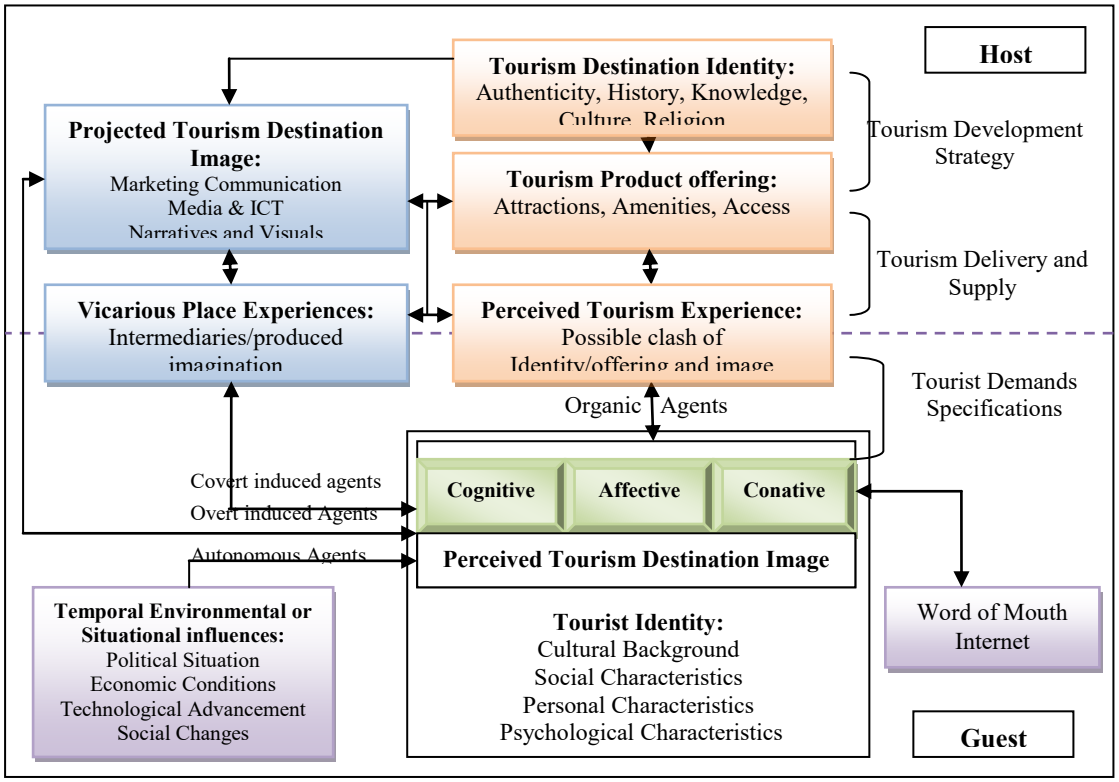
Source: Baloglu and McCleary (1999, p.870)

Gallarza *et al.* (2002) suggest that Baloglu and McCleary‟s (1999) model of destination image formation is one of the most successful studies within the field and in order to

develop a positioning strategy destination marketers should be aware of the perceived strengths and weakness of the destination as well as with competing tourist areas.

Govers *et al*. (2007) have developed a destination image formation model. This framework provides the basis for the detailed deconstruction of the destination image paradigm and attempts to identify the elements that have influence on the perceived image in the mind of potential tourists (see Figure 4.6). Obviously, Govers *et al*. (2007) have been influenced by Baloglu and McCleary (1999). In their work, they have linked the perceived image with destination factors such as history, culture, natural environment, accommodation, and infrastructure, and sources of information including marketing efforts, media, tour operators and travel agencies.

Figure 4.6: The tourism destination image formation model



Source: Govers *et al.*, (2007, p.16)

The projected destination image should be anchored to reality, and if destination identity does not reflect reality, tourists will become dissatisfied expressing their dissatisfaction towards the host and intermediaries who are not performing as they had originally promised (Govers *et al.,* 2007). In general, the model consists of significant factors that have influenced destination image formation, such as the tourism product itself, word of mouth, Internet, media, intermediaries, and external environment factors.

Assessment and measurement of destination image

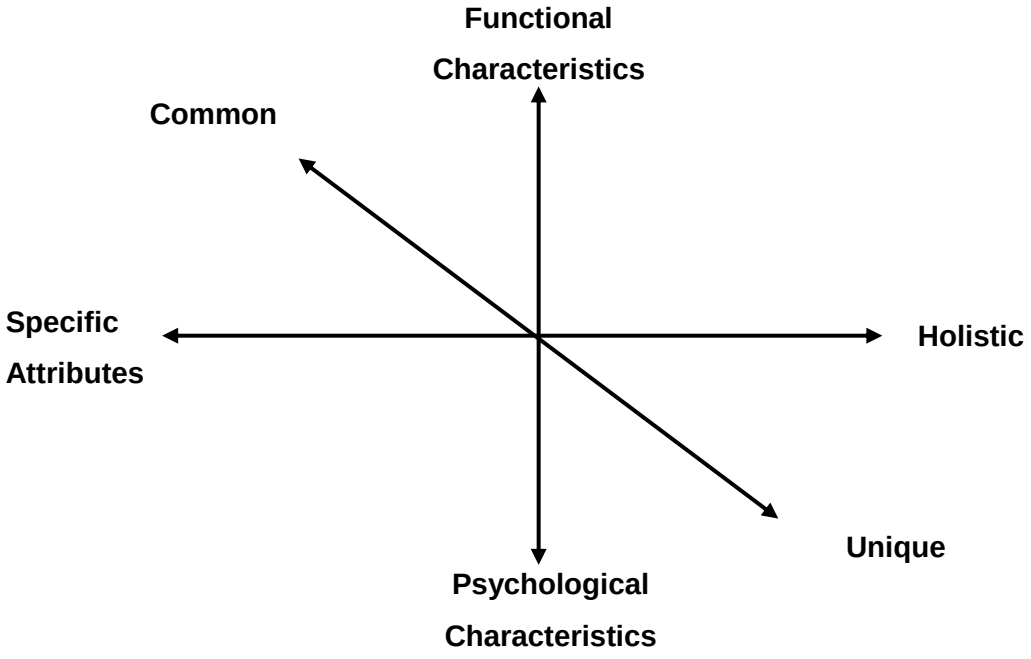
Again the measurement of destination image has been widely discussed in the last three decades. Due to the complicity and diverse nature of the tourism product, it seems necessary to develop more specific and more complex conceptual frameworks and methodologies for increased reliability and validity to measure the destination image (Echtner and Ritchie, 2003). Researchers in the tourism field face difficulties in the selecting of appropriate methods and techniques to measure tourists‟ perceptions and attitudes toward destinations, especially for developing and promoting destinations (Driscoll *et al.,* 1994).

Most destination image studies have used structured measurement techniques. However, a few researchers have used unstructured or open-ended surveys. Most of the studies adopting a structured measurement technique have employed the semantic differential and/or the Likert scale technique to measure cognitive and affective components of destination image. Unstructured techniques on the contrary aimed to examine the complex structure of image. Echtner and Ritchie (1993) suggested that a combination of both structured and unstructured methodologies should be employed to capture the

complex assessment of destination image. Echtner and Ritchie (1991) determined three major dimensions along which image should be measured:

- A dimension that distinguishes between the functional characteristics (specific benefits provided) and the psychological characteristics (the more abstract feeling experienced) of a destination.
- A dimension that distinguishes between the specific attributes of destination versus the measurement of a more holistic impression of the destination.
- A dimension that distinguishes between the measurement of aspects that are common to virtually (see Figure 4.7).

Figure 4.7: Dimensions of image measurement



Source: Echtner and Ritchie (1991, p. 6)

A comprehensive survey by Echtner and Ritchie in 1991 revealed that most TDI research was focused on measuring functional attributes rather than psychological.

Table 4.2 provides the image attributes that have been used by researchers to measure destination image.

Table 4.2: Measurement destination image attributes used by researchers

functional	Attribute	Number of studies measuring the attribute
	Scenery/natural attraction	13
	Costs/price levels	9
	Climate	8
	Tourist sites/ activities	8
	Nightlife and entertainment	8
	Sport facilities/ activities	8
	National park/ wildness activities	7
	Local infrastructure/ transportation	7
	Architecture buildings	7
	Historic sites/ museums	6
	Beaches	6
	Shopping facilities	5
	Accommodation facilities	5
	Cities	4
	Fairs, exhibits, festivals	2
	Facilities for information and tours	1
	Crowdedness	4
	Cleanliness	4
	Personal Safety	4
	Economic development affluence	3
	Accessibility	2
	Degree of urbanization	1
	Extent of commercialisation	1
	Political stability	1
	Hospitality/ friendliness/ receptiveness	11
	Different customs/ culture	7
	Different cuisine food and drink	7
	Restful / relaxing	5
	Atmosphere/ familiar versus exotic	4
	Opportunity for Adventure	3
	Opportunity to increase a knowledge	2
	Family or adult oriented	1
	Quality of service	1
	Fame/ reputation	1
psychological		**166**

Source: Echtner and Ritchie (1991, p.10)

Obviously, some attributes have been measured more than others. This does not reflect that the most used attributes are the most important. Until 2008 there was no evidence that researchers had sorted the image attributes from the most important to the less important. Crouch (2008) was the first scholar who considered the significant destination competitiveness attributes from an expert‟s perspective.

Destination image sources and competitiveness attributes

As discussed earlier, image is formed by two factors: personal factors and stimulus factors and a destination‟s image is built on what people see, hear, feel, read and expect about the destination. Information is received through many sources with the most important ones being international media (such as television programmes, magazines, and newspapers), tour operators and travel agencies, word of mouth as well as the powerful marketing activities including (Internet websites, branding and positioning).

A study conducted by Govers *et al.* in August 2007 identified the main sources of image information for seven destinations (Dubai, Flanders, Florida, Canary, Morocco, Singapore, Wales). Significant issues emerged in this study in that firstly sources of image information varied from destination to destination and secondly it was noticeable that some sources were more important than others. However, word of mouth magazines and Internet were the most powerful sources of image information. The study did not intend to provide a global representation of information sources of destination image, but it did provide indications of the main sources of destination image.

In spite of the valuable results that emerged from the Govers *et al*. (2007) study, it failed to explain the relationship between television, movies, news, newspaper and the media, because all are part of the media. In addition, travel (23.0%) and experience (5.8%), as well as magazines and advertisements were also not linked, probably because the study was qualitative and thus used open-ended questions and gathered the most mentioned words rather than grouping the sources into particular categories. Regardless of this, not all potential tourists have made the final decision to travel to a particular destination before interaction with tour operators and travel agencies. Thus, tour operators and travel agencies still have a role to play in formatting the destination image. Goodall (1988) argues that individuals are aware of only part of the total holiday opportunity from formal sources (such as tour operators, travel agents and brochures), and informal sources of information (such as word of mouth via relatives and friends) have an important role to play.

The role of international media in destination marketing

According to Middleton and Clarke (2001) media is a communication tool which includes radio, television, newspapers and all other mass circulation means of communicating either paid or unpaid messages to people. Masterman and Wood (2006) add that media includes publications; radio, television and the Internet in order to reach desired target publics. Thus, in this study international media means all sources of information presented through television channels, brochures, posters, CDs, DVDs, films, newspapers, magazines, and the Internet which targeting potential tourists.

> *The media is increasingly influencing the holiday and day trip decisions of UK tourists in terms of where they go, the type of trips they take and when they choose to travel.*
>
> (Horner and Swarbrooke, 1996, p. 513)

Media is classified into four basic types which are print, broadcast, electronic, and outdoor and each of those types has a number of options (Oelkers, 2007). Destinations can select the relevant type in terms of cost to target audience and time. Oelkers (2007) suggested the selection of the media is based on five factors: target audience; cost of media; the number of people who are expected to see the advertisement; the time of the advertisement; the required time for preparing the advertisement.

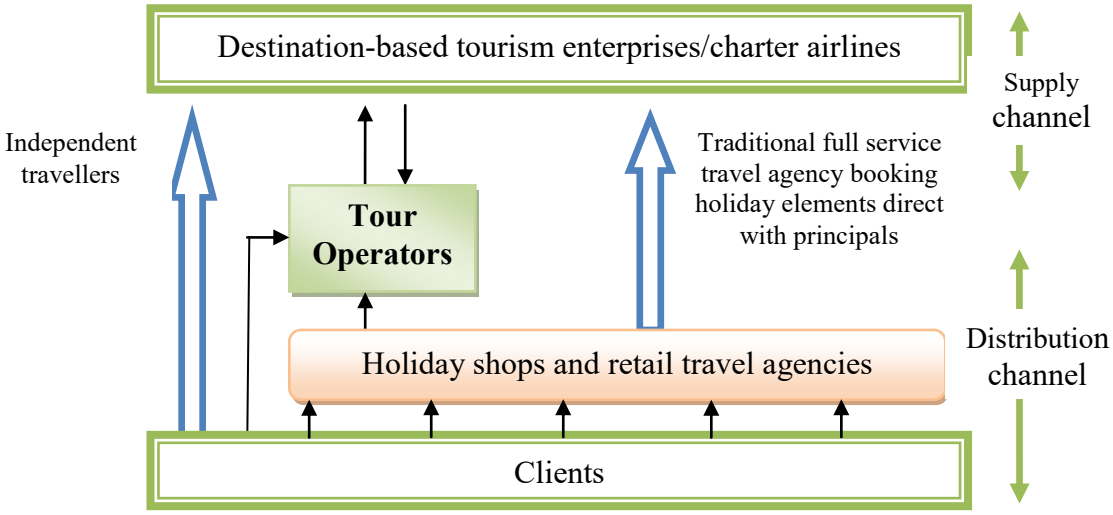
Horner and Swarbrooke (1996, p.513) added that the tourist market in the UK is influenced by two types of media:

1- *Travel media; including guidebooks, editorial features in newspapers and periodicals and specialised radio and television programmes which are concerned with tourism solely;*
2- *Non-travel media; which covers literature, films, ad radio and television news programmes, wildlife shows and drama series.*

Tour operators

There are more than 1400 tour operators and travel agencies in the UK, have Air Travel Organiser‟s License (ATOL). But the market is dominated by four main tour operators: TUI UK (formerly Thomson Holidays), My Travel (rebranded as Air tours), Thomas Cook (previously branded as JMC Holidays) and First Choice (Gale, 2006). According to Laws (1997) there are three main channels of distribution available from which tourists and individuals can book: directly; indirectly through holiday shops and retail travel agencies; tour operators (as illustrated in Figure 4.8).

Figure 4.8: The basic holiday model



Source: Laws (1997, p.25)

> *Tour operators are often described as the wholesaler in the tourism system, operating between the producer of the primary product and the retailer. However, the tour operator can also be seen as a producer who takes raw materials, like hotel beds and airlines seats, and processes them into a manufactured product which it then sells.*
>
> (Horner and Swarbrooke, 1996, p.307)

Tour operators and travel agencies are significant sources of information and distribution channels influencing the images and decisions of potential tourists (Baloglu and Mangaloglu, 1999). According to Reimer (1990), tour operators and travel agencies do not merely serve as channel distributors but also as image creators. Baloglu and Mangaloglu (1999, p.2) argue that:

> *The images held by travel intermediaries about destination are equally important as those held by the travellers.*

Tour operators have dominated roles in the travel and tourism industry and tour operators leading the sector in creating and meeting tourists" needs. In fact technology and the increased use of the Internet were the key factors beyond the growth and

development of international mass tourism despite the significant role of tour operators, however, little literature has discussed this issue in depth (Sharpley, 2006).

Tour operators are the key organisations in the inclusive holiday industry and offer a wide range of services including packages featuring destinations. The packages may be structured and inclusive of everything that tourists require from the moment they leave home until they return back. These services include flights, accommodation, transportation, restaurants and site fees, making the quality of services dependent on suppliers (Horner and Swarbrooke, 1996; Sigala and Leslie, 2005).

Trust and connectivity

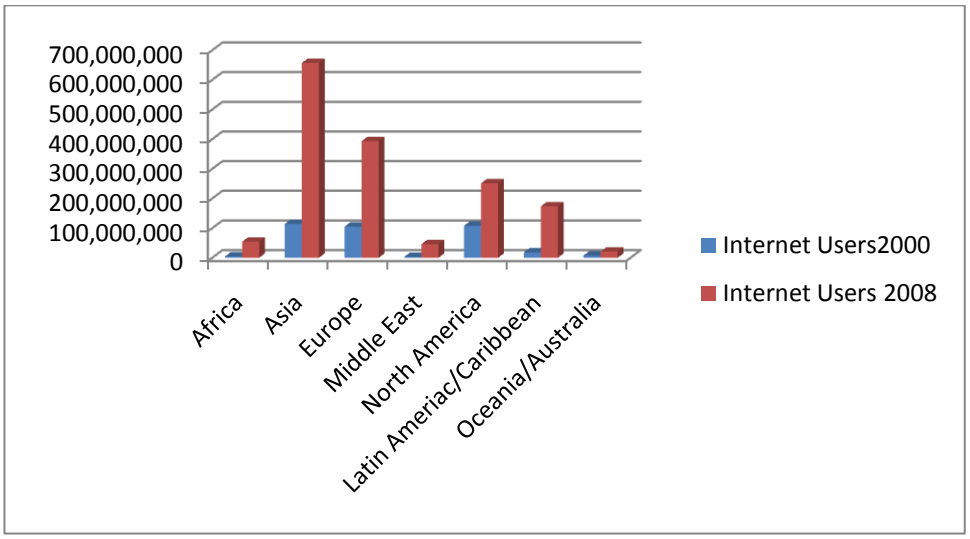
Studies conducted by Baloglu and McCleary (1999) and Alaeddinoglu and Can (2009) found that friends and relatives were the most powerful tool in visiting destinations followed by the Internet, then travel booklets. Thus, they recommended that destinations marketers should consider providing tourists with a pleasant experience in order to develop positive images for potential visitors. According to a global Nielsen survey of 26,486 Internet users in 47 markets, statistics showed that word of mouth was considered to be the highest level of trust as source of information, (MC Marketing Chart, 2007).

While competition between brands is becoming more intense, and consumers receive attractive marketing messages, people who are considering making a purchase frequently turn to the only remaining objective resource (word of mouth). It becomes a faster and more important source of information and accounts for as much as four times

that of TV advertising and is five times more effective than magazine advertising (Fresh Networks, 2009).

A rapid increase in the use of the Internet internationally has seen users increase from 360,985,492 in 2004 to reach 1,596,270,108 with an average growth of 342%. Africa and the Middle East have seen a significant growth of more than 1000% as illustrated in Figure 4.9. On the other hand, North America and Europe are the main regions that use the Internet with 74% and 60.4% respectively, (Internet World Stats, 2009). This dramatic increase makes the Internet a powerful marketing tool to promote a product or destination.

Figure 4.9: World Internet users in 2000 and 2008



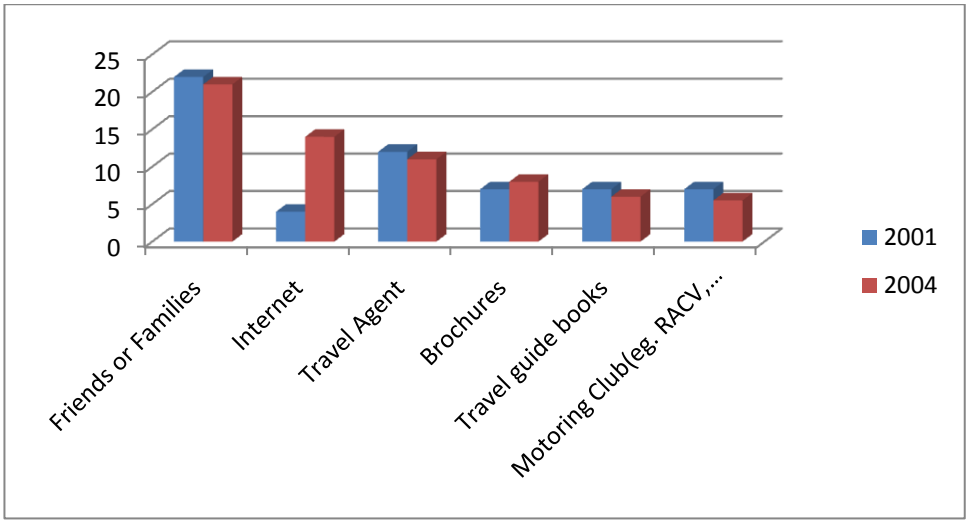
Source: Internet Word Stats (2009, p.1)

The Internet has emerged as a significant communication and distribution channel since it took off in 1994, and has rapidly increased its use as a source of holiday information becoming the second source after friends and families. Figure 4:10 shows changes in

the influence on consumers choosing their most recent holiday destination (TNSW, 2006).

> *With Internet marketing, consumers will be able to find out all kinds of information they need to plan their trips. The Internet makes it possible for consumers to download maps and learn as much about their destination as possible. It also provides a vehicle for them to purchase tickets and rental cars.*
>
> (Grazian, 2008, p.1)

Figure 4.10: Influence in choosing holiday destination from 2001 to 2004



Source: TNSW (2006, p.1)

Many tourism organisations started using the World Wide Web (www) to promote their tourism products and attractions in order to increase the number of tourists and time spent at the destination (Lennon, 1995). According to a recent survey conducted by Travelocity.com, one in five people now book their holiday on the Internet; the Internet enables tourists to shop for travel more easily from their home PCs (Brown, 2006).

Internet is a significant tool for brand building. Palmer (2004) asserts that the Internet can offer great opportunities for a destination to develop strong brands. Therefore,

destinations particularly emerging ones such as Libya should consider the Internet as a powerful tool for: destination awareness; promoting tourism product; communicating with potential tourists and brand presentation.

Virtual travel communities

Virtual Travel Communities (VTCs) have emerged recently as an effective marketing tool with increasing number of Internet and online communication (Nabeth, 2005; Mills, 2007). Travel and tourism industry was one of the first industries to go online, and recognised the potential of VTCs for destination and product promotion. VTCs make it easier for potential tourists to obtain information and exchange experience about tourism destinations, which eventually, make travel-related decisions (Stepchenkova *et al.*, 2007). However:

> *The VTCs can be seen as truly global knowledge communities in the sense that it brings together knowledge, identity, performance and aesthetics to communicate knowledge not only about tourism, but also about living in a global society.*
>
> (Jensen, 2008, p.503)

Destination branding and positioning

Destination branding and positioning is a vital element for developing Libya as a competitive tourism destination. This section critically discusses destination branding and how destinations can develop a successful brand. According to Vaid (2003), the term „branding" developed in 19th century during the Industrial Revolution. The term brand is used to distinguish between products, services or business, however, the term „branding" is the act of impressing a product, service or business on consumer minds.

According to the American Marketing Association (2006 cited in Tasci *et al.,* 2007, p.1529):

> *A brand is a name, symbol, or other marker that distinguishes one product from another*

However, "*logo is the visual expression of a brand*" (Vaid, 2003, p.28). Logos are efficient tools in building the awareness and destination image, and contribute to identifying what the tourism destination has to offer while differentiating the destination from its competitors (Hem and Iversen, 2004).

> *To really achieve destination branding, marketers must be in the business of delivering impactful experiences, not merely constructing a clever brand identity on paper with slick slogans and logos", the introduction rightly asserts*
>
> (Morgan *et al.,* 2003, p.87)

Destination branding is an extremely relevant topic, where some destinations have already developed successful destination brands, such as Australia which launched its brand officially in 1995, and has continued its strong track record as a destination brand (Blackadder, 2006). New Zealand, in July 1999, launched its brand of *100% Pure New Zealand* (Morgan *et al.,* 2004). Other brands, such as *Truly Asia*, *Uniquely Singapore* and *Amazing Thailand,* have also to become strong competitive destinations (Davies, 2003).

On the other end of the spectrum some destinations, such as Turkey, have an image problem and are perceived negatively (Tasci *et al.,* 2007). A negative image of tourism destinations may be caused by political, social or natural events at the destination (Sonmez and Sirakaya, 2002). In addition, other tourism destinations, such as France, face serious challenges to re-branding themselves as tourism destination (Olins, 2002).

The Dominican Republic has also attempted to re-brand itself as a tourism destination (Joseph, 2007). Hankinson (2003) points out that there is a significant growth in destination marketing. However, the concept of destination branding has not yet been studied in depth (Cai, 2002).

Brand identity has great value if targeted to the appropriate audience, and customers" perceptions are determined by what they see and hear about the brand through a variety of media sources (Vaid, 2003). Brand identity is related to which customers or tourists can recognise a particular product, service and destination through a brand where brand equity is concerned with the value of the brand. Product brands can be measured as an intangible asset where destination brands have not been evaluated yet.

Brand equity is a confusing concept from which to understand tourism destinations (Tasci *et al.,* 2007). Haig (2003) argues that the process of branding aims to protect products or services from failure, and while consumers make decisions based on the perception of the brand, more than the product reality hence, image becomes everything. Morgan *et al.* (2004) argue that with increasing competition in tourism market destinations firms must create unique identities in order to differentiate themselves from their competitors.

Furness (2005) in the UAE conference about destination marketing and branding in the Middle East region, asserted that the Middle East on the whole, is immature and a mismatch of destination brands. Morgan *et al.* (2003) claim that branding is a powerful weapon in destination competitiveness and managing a destination brand poses many

challenges, including the crucial role of public and private sector stakeholders. However, political issues are a major threat to destination branding and destination stakeholders must integrate their efforts to support the brand. According to Buhalis (2000 cited in Morgan *et al.,* 2003) a destination is not a product and cannot be marketed as a soap powder.

Kaplanidou and Vogt (2003, p.34) suggest when developing destination brands the following steps should be considered:

- Understand how visitors perceive the destination and build the brand‟s components based on these perceptions.
- Create a vision and a mission for the organisation‟s branding efforts.
- Create a brand with unique features that differentiate it from the competition.
- Remember, brand is a promise, it is set of strong associations people have with a place and forms their expectations.
- The brand has to deliver on the expectations in order to increase its value and create loyal customers.
- Manage the brand through the right positioning to stimulate and affect consumer‟s perceptions and claim a position in their minds.
- Leverage the brand through co-branding and product (services and experiences) extensions.
- Monitor brand effectiveness.

According to Kotler and Gertner (2004, p.52), countries can be branded for tourists. They suggest the following strategic management approach for destination branding process:

- The country needs to carry out a SWOT analysis to determine its chief strengths, weaknesses, opportunities and threats.
- The country then chooses some industries, personalities, natural landmarks and historical events that could provide a basis for strong branding and story-telling.
- The country should then develop an umbrella concept that would cover and be consistent with all of its separate branding activities. Among the possible concepts would be a county of pleasure, quality, security, honesty or progress, or other concepts.
- The country then allocates sufficient national funds to each branding activity deemed to have a potentially large impact.
- The country creates export controls to make sure that every exported product is reliable and delivers the promised level of performance.

Kaplanidou and Vogt (2003) assert that the destination brand should build on the perception of visitors. In contrast, Kotler and Gertner (2004) believe destination brand should based on the destination characteristics and attractions, this argument led the researcher to consider the two ideas as essential elements in developing destination brand. In this regard, the researcher has collected a wide range of relevant literature about destination branding and the process of developing destination brand.

Hall (2004), (who is a director of brand consultancy corporate Edge) is involved in developing the Britain brand and has thus determined five component elements of brand identity; photography, colour, typography, tone of voice and the marque. Hankinson (2003) added that successful branding requires investment in infrastructure, strong relationship among stakeholders, targeting appropriate markets, and consider the service quality. Moreover, a good destination brand should create a clear vision of the future for the community and its potential (Farook, 2007).

According to the UNWTO (2006), there are five main challenges of destination branding which are: budget limitation, political interference, external environment, product challenges and differentiation. However, the UNWTO (2006) has suggested five steps for building a brand:

1- Market investigation, analysis and strategic recommendations

2- Brand identity development

3- Brand launch and introduction- communicating the vision

4- Brand implementation

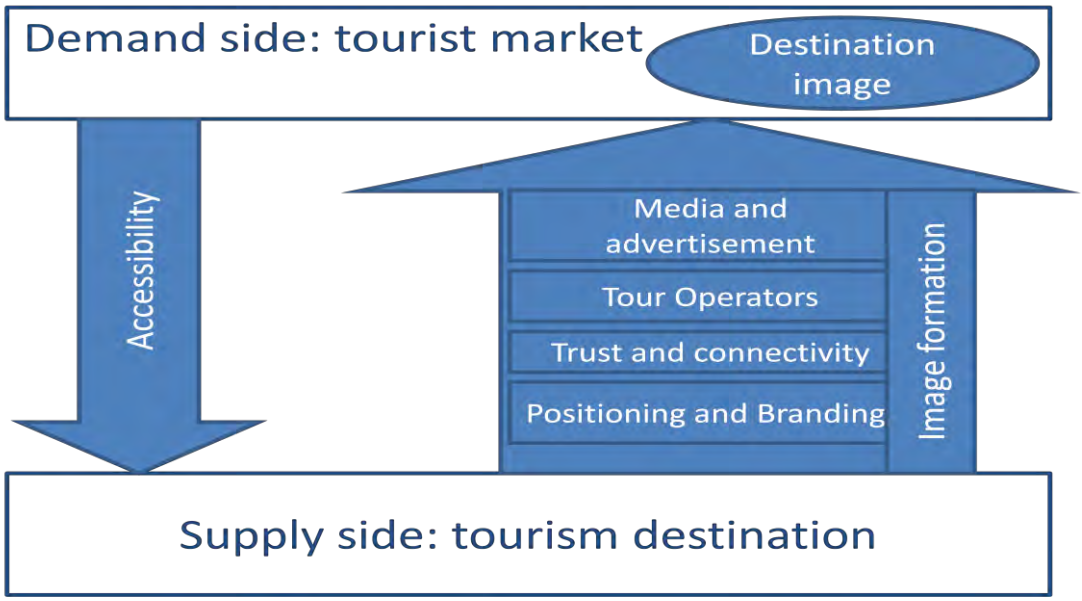
5- Monitoring, evaluation and review

Back and Parks (2003) found a direct and positive relationship between customer satisfaction and brand loyalty. Satisfied visitors are most likely to repeat their visit, and send a positive message to relatives and friends, often persuading them to visit the destination. The study explained that some destinations have developed successful brands where others failed to do so, for emerged tourism destinations such Libya, Kaplanidou and Vogt (2003) and Kotler and Gertner (2004) are a good frameworks for developing destination brand.

After an extensive discussion of tourist market (demand side) and determining the main factors have influence on potential tourist holiday decision, this enabled the researcher to build the first stage of the SCDM. The initial stage of the SCDM based on tourists in tourism market act according to their images of tourism destinations (Gunn, 1972; Hunt, 1975; Chon, 1990; Guthrie and Gale, 1991). however, as will discussed earlier, destination image can formed by a number of activities such as (the media,

advertisements, projected image at tour operators, trust and connectivity, and positioning and branding) (Horner and Swarbrooke, 1996; Baloglu and Mangaloglu, 1999; Govers *et al*., 2007; Oelkers, 2007), these sources have significant influence on potential tourists holiday decision-making. However, destination accessibility plays a crucial role in facilitating tourist flows to tourism destinations (Dwyer and Kim, 2003); Figure 4.11 explains the first stage of building the SCDM.

Figure 4.11: The relationship between tourism destination and tourist markets (Stage 1 of building SCDM)



Based upon the work of (Leiper, 1997; Horner and Swarbrooke, 1996; Baloglu and Mangaloglu, 1999; Dwyer and Kim, 2003; Morgan *et al*., 2004; Govers *et al*., 2007; Oelkers, 2007)

4.4 Tourism destination (Supply side)

According to Babylon Dictionary (2009) a tourist destination is a city, town or other area of the economy which is dependent to a significant extent on the revenues accruing from tourism. It may contain one or more tourist attractions or visitor attractions.

Batchelor (1999, cited in Vellas and Becherel, 1999, p.183) asserts that there are many tourism destination levels:

- *Self-contained resorts-country club hotels, holiday villages;*
- *Villages, towns, cities;*
- *Area which extend beyond administrative boundaries but have a cohesive identity with a specific theme, such as national parks;*
- *Regions defined by administrative boundaries;*
- *Countries;*
- *Group of countries (for example Southern Africa, the Caribbean) and continents.*

Thus, for this study, tourism destination can be defined as a geographical location which has tourism attractions and which tourists want to visit or experience; this includes destination accessibility, comparative advantage (natural resources, heritage, culture), and supporting resources and facilities (accommodation, transportation, and infrastructure).

4.4.1 Destination accessibility

Prideaux (2000, cited in Khadaroo and Seetanah, 2007, p.1021) argues that tourism destinations should have easy flights to and from their tourist-generating regions. Destination accessibility is a critical supporting factor in destination competitiveness. It incorporates the extent to which tourists can easily enter the country or the region. It is related to the barriers and necessary permissions required in order to be allowed into the destination country, including getting visas and various supporting documentation (such

translation pages in passports and medical certification if required). All these aspects control and restrict tourist flows.

> *The accessibility of the destination is governed by a variety of influences including the frequency, ease and quality of automobile, air, bus, train, sea access, aviation regulations, entry permits and visa requirements, route concessions, airport capacities, competition among carriers etc.*
> (Dwyer and Kim, 2003, p.384)

4.4.2 Tourism products

According to Burke and Resnick (2000) most industries produce either products or services, but travel and tourism products are different. There are several characteristics that distinguish travel and tourism products from other industries. These include: intangibility, simultaneous production and consumption, perishability, seasonality, parity, uniqueness, and complementarity. Jones and Haven-Tang (2005, p.3) listed the characteristics of tourism products identified by different scholars as:

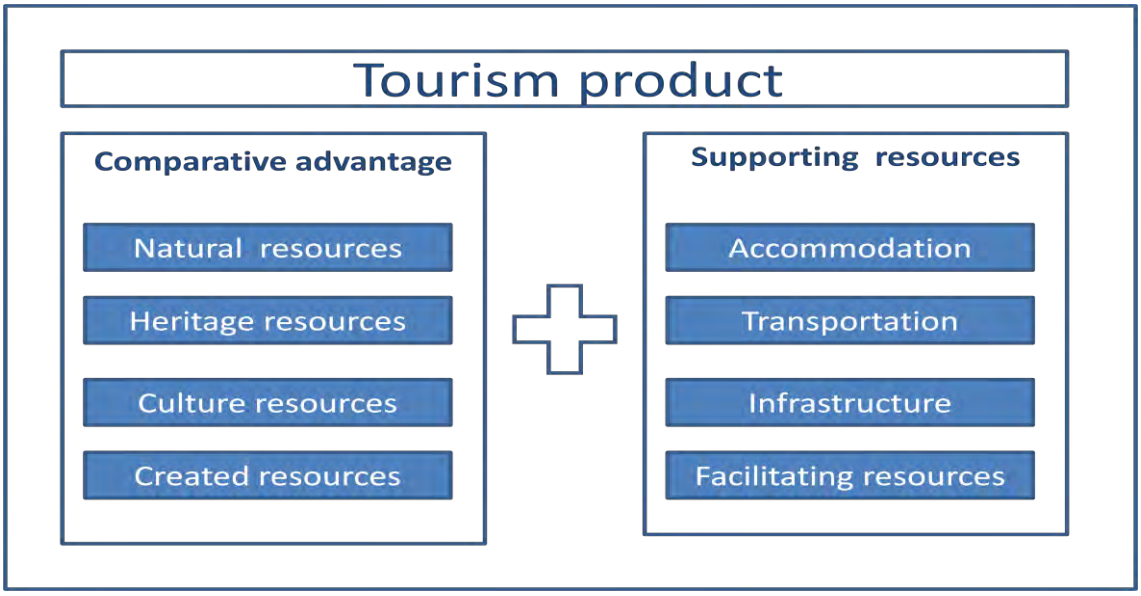
- Intangibility (Shosack, 1977);
- Perishability (Zeithaml *et al*., 1985; Onkvisit and Shaw, 1991; Hartman and Lindgren, 1993);
- Inseparability of production and consumption (Gronroos, 1978; Bowen, 1990; Onkvisit and Shaw, 1991);
- Heterogeneity (Zeithaml *et al*., 1985; Onkvisit and Shaw, 1991);
- Interdependence (O"Connor, 1999).

Whilst tourism products have specific characteristics that differentiate them from manufacturing products, the question is what is a tourism product? This section identifies what is meant by a tourism product. Chand (2000, p.9) defined a tourism product as:

> *The sum of the physical and psychological satisfaction, it provides to tourists during their „travelling and sojourn" en route at the destinations. „Tourist product" focus in facilities and services designed to meet the needs of the tourists. Mostly a travel product comprises a core of the following components: attractions; access; amenities and ancillary services.*

Tourism product in this study defined as comparative advantage which is natural resources, heritage resources, cultural resources and created resources, and supporting resources which are accommodation, transportation, infrastructure and facilitating resources, as explained in Figure 4.12.

Figure 4.12: Tourism product (stage 2 of building SCDM)



Based upon the work of Gronroos (1987); Ritchie and Crouch (2003) and Dwyer and Kim (2003)

4.4.3 Comparative advantage

Comparative advantage is related to the core resource and attractions in a destination. Core resources, however, can be divided into four elements, natural resources, heritage resources, cultural resources and created resources. The core resources and attractions

component are those factors that motivate tourists to visit the destination. Core resources and attractions can be uniquely attractive and appealing and this differentiates the destination. Tourists particularly admire sites, such as Roman and Greek historical sites, and ancient civilisations. The word heritage derives from the word inheritance which means transferring something from one generation to another, and heritage is often seen as a carrier of historical value from the past. In recent decades, heritage and tourism have become inextricably linked throughout the world (Sigala and Leslie, 2005).

Dwyer and Kim (2003) see natural resources as including physiography, climate, flora and fauna, scenery and other physical assets. Physiography and climate are vital tourism factors and dominate other factors in comparative advantage. Physiography and climate include lakes, rivers, oceans, seas, forests, deserts, rural and urban areas, air quality, scenery, flora, fauna, and wildlife, with these natural resources being out of control of destination managers. Wisdom here lies in how to exploit them effectively. Destinations that have one or more favourable and unique physiographic resources tend to compete by employing this advantage (Ritchie and Crouch, 2003).

Sigala and Leslie (2005, p.9) state that:

> *The term "heritage tourism products" refers to institutions, lifestyle-heritage opportunities, artefacts, heritage sites and events. These heritage products can be linked.*

Culture and history is about the life style of the local people, about the traditional and also about the past and what people have preserved from the past such as ancient civilisations. Ritchie and Crouch (2003) argue that local cultural history should not be

changed or altered for tourism development purposes. Special events are social activities done by local people, such as local festivals, or organised by professionals from different areas of life, including music, sport, business, or even natural phenomena.

> *Special events refers to a wide range of happenings that can create high levels of interest and involvement on the part of both visitors and residents.*
>
> (Ritchie and Crouch, 2003, p.69)

Created resources are attractions that established by the government or tourism industry. Tourists may wish to visit these attractions and wonders, some of which have not been created for tourism purposes but nevertheless have become tourist places of interest, good examples being the Birds Nest Stadium in Beijing (the world‟s largest stadium) and the Burj Khalifa in Dubai (the world‟s tallest structure).

4.4.4 Supporting resources and facilities

Supporting resources are accommodation, transportation services, infrastructure and facilitating resources. According to Ritchie and Crouch (2003), destinations attract tourism core resources and without strong supporting resources facilities are less likely to develop their tourism industry.

Supporting factors and resources are described as the foundation or the base of the tourism industry and if the bases of the building are weak or insufficient, the whole building is at risk and might tilt or be destroyed. On the other hand, if bases are over-designed they may also minimise the value and profitability of the tourism industry. At

this level, destinations have a wide range of flexibility in order to compete and gain competitive advantage (Ritchie and Crouch, 2003).

Murphy *et al.* (2000) found that the level or lack of appropriate providers have significant impact on tourist experiences, and provided services, such as airlines, accommodation and distribution channels are an important predictor of destination services, quality and perceived trip value as well. In other words, tourists can evaluate the quality level in terms of the tangible received services.

Ritchie and Crouch (2003) divided infrastructure into two categories, which are called general infrastructure and basic services infrastructure. General infrastructure includes: destination transportation system (roads, highways, airports, rail systems, bus terminals, ferries and shipping, taxis), public safety (police, fire and other emergency services), water resources and supply systems, electrical generation and transmission systems, sanitation and drainage systems, natural gas services, telecommunication systems, mail and freight services, medical systems, financial systems, administrative systems and the education system in terms of schools, universities, vocational colleges, and libraries. Where the basic infrastructure services include a wide range of retail and shopping facilities, food stores, garages and vehicle maintenance facilities, petrol stations, drug stores, bookstores and news kiosks, hairdressers and launderettes.

Accommodation is the largest and most important sector in the tourism industry because most tourists spend a considerable time in the accommodation and a high proportion of the cost of the trip is related to the cost of accommodation (Sharpley, 2006).

Entertainment is an industry which provides travel and tourism with special facilities for tourists to have fun and excitement in their leisure time. Entertainment includes cinema halls, gambling machines, video games, theatres, night clubs and national parks (Ritchie and Crouch, 2003). Destination managers can make the entertainment industry an attractive factor for tourists, a recent example being New Zealand. However, religion and culture have a strong influence on some types of entertainment, for example, some Muslim destinations such as Saudi Arabia, Libya and Iran, are not allowed to open night clubs or gambling halls because it is banned by the Quran, consequently the challenge is always how destinations make themselves unique different to other destinations.

The quality of both the general and basic infrastructure (i.e. roads, airports, and shopping centres) and tourism facilities affects competitiveness in many ways. Firstly, the quality of infrastructure may attract tourists and can affect a tourist‟s decision making process. Secondly, the quality of infrastructure can help the tourism system function more efficiently and effectively

4.4.5 Local communities and tourism development

Little attention is often paid to local communities from a tourism perspective with numerous studies revealing that the majority of tourists go to a particular destination for its physical features, while in fact there are people living in this destination. The questions that arises from this, is why do not researchers pay attention to locals (Krippendorf, 1999).

Wisansing (2008) highlights the term local community from a tourism perspective, as the people living in a geographical location. Wisansing (2008) noticed that there is a gap between theoretical requirement of tourists and practical difficulties. However, Hall and Richards (2003) emphasise that tourists may travel to a particular destination to experience the way of life and material products of local communities. Hall and Richards (2003) linked the concept of sustainability with local communities, they stated that:

> *The rationale of sustainable tourism development usually rests on the assurance of renewable economic, social and culture benefits to the community and its environment.*
>
> (Hall and Richards, 2003, p.1)

"Local communities" is a wide subject, this study will not discuss this issue in detail, while the study will focus upon tourism development in general. Local community and tourism development is an interesting and important area of study which is recommended for future research. Local communities‟ involvement, participation, empowerment and development, all those titles are vary from destination to another and depend upon the destination‟s economic and political system. Local communities can be part of the problem and can provide potential solutions for sustainable tourism development (Hall and Richards, 2003). Therefore, local communities‟ involvement and participation becomes essential in tourism development, particularly for emerging new tourism destinations such as Libya.

Wisansing (2008, p.47) collected a number of scholars‟ views about community participation; he states that community participation is premised upon:

1- *Voluntary and democratic involvement of people* (Strawn, 1994; Warburton, 1998; Butler *et al*., 1999);
2- *Grass-roots initiatives, as opposed to an imposition from above* (Strawn, 1994; Butler *et al*., 1999);
3- *Participants" capability to make choices and influence outcomes* (Beeker *et al*., 1998; Warburton, 1998);
4- *Shared decision-making at all levels of the programmes, setting goals, formulating policies, planning, and implementing* (Strawn, 1994; Butler *et al.,* 1999);
5- *Equitably sharing benefits from development as a result of participation* (Zetter and Hamza, 1998).

Wisansing (2008) ended his article by arguing that currently the issue is not whether local communities should be involved in tourism development, but the problem is who should be considered for the discussion, and how and when. Destination communities have different forms and scales and differ over time (Boyd and Singh, 2003). Despite the fact that communities share many things, they are, in fact, complex entities and are often not a homogenous group (Sproule and Suhandi, 1998 cited in Singh, Timothy and Dowling, 2003). Fagence (2003) reminds us that numerous studies have revealed that tourism activity and developments have positive and negative impacts on local communities. Pearce (2003, p.103) suggests that if negative impacts are ignored, the sequence actions which might occur is:

- *A loss of support for the authorities/councils which promote tourism;*
- *An unwillingness to work in the tourism industry;*
- *A lack of enthusiasm in promoting the tourism product by word of mouth;*
- *A hostility to the tourists themselves which can be manifested in over-charging, rudeness and indifference to the tourists" holiday experiences;*
- *Delays in the construction of tourism development because of community protests.*

The social and cultural impact on the tourism industry is discussed in detail in Chapter 3; this chapter highlights the role of local communities in the tourism industry and as an important element in the SCDM. The friendliness of the local population and attitudes towards tourists is important (Dwyer, 2001). Heat (2003) points out that the willingness of residents to provide assistance and information to visitors plays a positive role in destination competitiveness.

According to Davis and Softest (1995 cited in Robinson *et al.,* 2000), it can be argued that tourism projects that do not involve local communities in the preparation process are more likely to fail or will not have enough support, but if they are invited and the framework protects their rights and respects their culture and interests, then the projects have better chance of succeeding. Notably tourists may become unwelcoming by locals, and locals may become aggressive towards tourists, therefore, the researcher suggests that, the behaviour and attitudes of local communities must be addressed and taken into consideration in the destination planning stage.

4.4.6 Destination planning and management

Fyall and Leask (2006) claim that destinations are characterised as difficult products to manage and market due to the complexity of products and stakeholders. Gunn (1988) was one of the pioneers who pointed out that the absence of planning is most likely to lead to serious malfunctions and inefficiencies. Destination management and marketing are often left to the people in the industry and consultants, and destinations are difficult to manage and market, due to the complexity of the relationship among stakeholders and their interests (Buhalis, 2000). Servicing visitors and meeting their needs and

requirements involves a commitment to strategic issues from a broad community of destination stakeholders (Welsh Assembly Government, 2005).

> *Destination management planning is a management system that provides a tourism organisation with the tools to produce sustainable and competitive tourism in destination.*
>
> (Australian Board of Tourism, 2007, p.4)

Williams (1998) notes there are three common tourism plans, master plans; incremental plans and systematic plans. The master plan is the most traditional plan in fulfilling the requirements of tourism and provides a framework for tourism development. Williams (1998, p.129) added that tourism plans:

> *...provide a mechanism for a structured provision of tourist facilities and associated infrastructure. Tourism plans including accommodation, attractions, transportation, marketing and a range of human resources.*

Buhalis (2000) claims that destination management and marketing plans should focus on achieving the following strategic objectives:

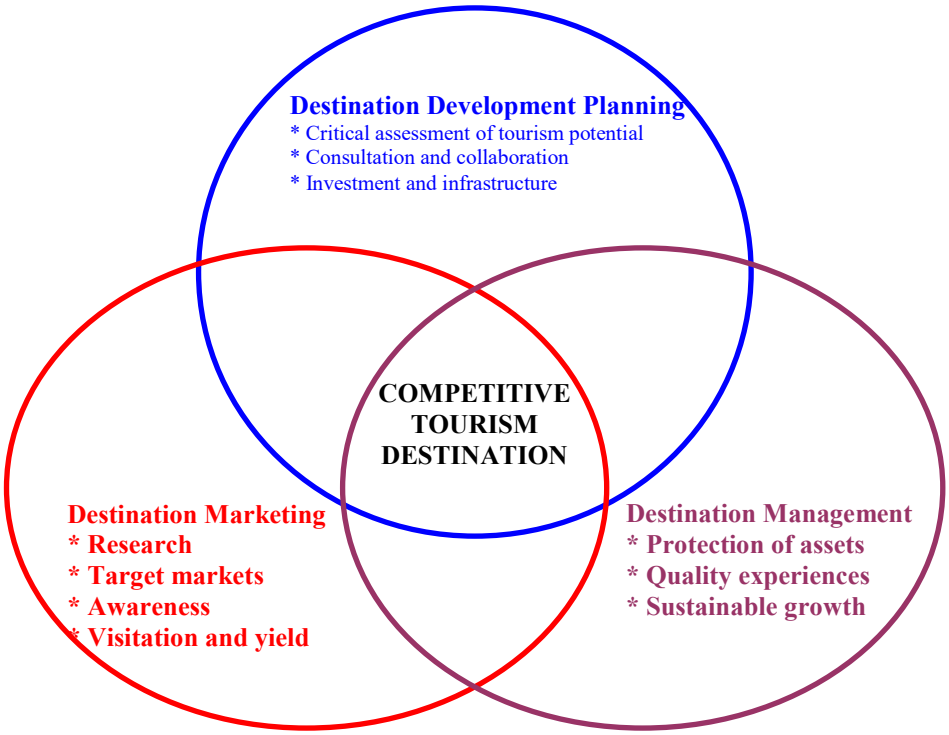
- Enhance the long-term prosperity of local people;
- Delight visitors by maximising their satisfaction;
- Maximise profitability of local enterprises and maximise multiplier effects;
- Optimise tourism impacts by ensuring a sustainable balance between economic benefits and socio-cultural and environmental costs.

In spite of the wide range of management functions that destination managers are engaged in, there are three main tasks that destination mangers should take into consideration: marketing; operational processes; human resource management.

> *A plan should clarify the path that is to be taken and the outcomes or end results. It also draws attention to the stages on the way and helps to set and establish priorities that can assist in the scheduling of activities.*
>
> (McCabe *et al.,* 2000, p.235)

The Australian Board of Tourism developed a model for destination management planning consisting of three dimensions: destination development planning; destination marketing; destination management. Destinations wishing to gain competitive advantage should integrate these three dimensions effectively. Figure 4.13 explains the dynamic of destination management planning concepts.

Figure 4.13: Destination management planning concepts



Source: Australian Board of Tourism (2007, p.5)

The main elements of destination planning and management are explained in Figure 4.14, which are: the role of governments in tourism development; tourism businesses,

including SMEs; human resources development; environment issues and marketing strategies.

Figure 4.14: Destination planning and management (Stage 3 of building SCDM)

Based upon the work of (Dwyer and Kim, 2003; Ritchie and Crouch, 2003, and Jones and Haven-Tang, 2005)

Government role for tourism development

The tourism industry is managed by public and private sectors with the public sector consisting of the government, local authorities and public associations. The location of formal tourism bodies is in the government structure and dependent on the type of government and the role of the tourism industry in the national economy.

> *The government has many responsibilities, including defence, education, health, regulation of property rights, environmental protection and management, collection of taxes, supply of infrastructure and essential services, regulation of investment, and law and other.*
>
> (Jenkins, 2006, p.42)

Jenkins (2006) added that state or government involvement in the tourism industry relies upon the nature and type of state and its government. However, there are key

questions for exploring the role of the government in any political decision or action which will be undertaken including:

- Why the government and the wider state intervene in tourism?
- How should government and the wider state intervene in tourism?
- Who has influenced public policy in relation to tourism and with what effect?
- What policies or programmes are foregone in any decision or action (i.e. what are the opportunity costs)?
- What are the likely impacts of the decisions and actions taken?
- Who benefits or wins?
- Who loses?
- What interests (perhaps business interests) are being served?
- What are the implications for society generally?

Government policies vary from destination to destination and depend on many factors, including: type of government (democracy, autocracy, oligarchy, monarchy, dictatorship); structure of the government; economic development; politicians‟ attitudes toward tourism. Although tourism has significant impacts on many destinations, but the government‟s attitude to the tourism industry may also obstruct the development of the tourism industry.

Tourism businesses including SMEs

The tourism industry is now characterised by an increase in the number of SMEs operating, making them increasingly the power of the world‟s economy. Tourism SMEs include tour operators, travel agencies, recreation and entertainment, food,

accommodation, and transportation services (Ianniello, 2007). According to Jones and Haven-Tang (2005), the tourism industry consists of a mix of small and large businesses, which are often multinational firms or large number of local SMEs. Hugue and Woodburn (2006) reports that:

> *SMEs are the ants in the ant hill rather than the more glamorous animals of the forest. Because they are small and tightly managed, decisions can be taken quickly and they are flexible in responding to change in the temperature of the market. In the UK, as in the rest of the world, SMEs are recognised as the most responsive engine of economic growth.*
>
> (B2B International, 2006, p.1)

The report pointed out that SMEs operate as simple decision-making groups, and do not have complicated procedures, which give SMEs an advantage in gaining premium prices, good margins and consumer loyalty. The report concentrates on the advantage of SMEs, but on the other hand, SMEs are weak if they are targeted by large businesses or price wars. The cost per unit is high in SMEs, and due to a shortage of financial resources SMEs are exposed to serious difficulties and developments. Jones and Haven-Tang (2005) added that some SMEs may be missing strategies and management skills and many of them do not adopt an integrated approach to business planning.

According to the Department for Business, Enterprise and Regulatory Reforms (BERR), SMEs accounted for 99% of the UK economy in 2007, with 4.8 million UK businesses. Therefore, SMEs are the foundation of the UK economy, with significant productivity and performance (Rowe, 2008).

There is an increasing emergence of agencies which provide support, advice, access to funding and training for new and existing small and medium businesses (NECC, 2009).

These agencies are essential for developing SMEs, and if they did not exist to provide these facilities then the functions must be managed by the government. SMEs may be described as being a baby who has no knowledge or experience to survive in a new environment.

> *A more sophisticated understanding of SME heterogeneity and individual business motivations must be reflected in public policy designed to influence tourism SMEs to promote destination development.*
> (Jones and Haven-Tang, 2005, p.19)

According to Baum (1993) human resource management is the key of the success or failure of any organisation. It is concerned with planning, monitoring and controlling of the human resources as a management process (Page, 2005). Therefore, destinations and tourism businesses consider human resource management and development for achieve its objectives and competitiveness.

Human Resource Development

According to Ritchie and Crouch (2003), governments and educational institutes should take responsibility for developing the knowledge and human resources that meet destination requirements and future needs. It is worth distinguishing between human resource management (HRM) and human resource development (HRD). However, Heathfield (2000) emphasised that HRD is the framework which enables employees to develop their personal and organizational skills, knowledge, and abilities.

Cribb (2005) believes that the survival and success of organisations in fact depends on their ability to be "smart" at all levels of management. The challenge of creating and sustaining „smart" organisations should be to recruit and maintain „smart" people at all levels in management hierarchy which is probably greater now than it has ever been.

Mondy and Noe (1993, p.6) suggest six functions of HRM where HRD appears as a function of HRM: human resource planning, recruitment and selection, HRD, compensation and benefits, employee and labour relations, and human resource research. The objective of HRD is to improve the employees‟ productivity whilst ensuring an organisation‟s profitability.

> *The most valuable asset of a 20th century company was its production equipment. The most valuable asset of a 21st century institution will be its knowledge workers and their productivity*
>
> (Drucker, 1999, p.71)

Harrison (1992 cited in Beardwell and Holden, 1994, p.11), explains that education is the major contributor to the HRD process because it influences not only knowledge and ability but also an employee‟s character and culture. Training is a short-term systematic process, that helps individuals define tasks or areas of skill and knowledge that need to be achieved. He suggests a coherent and well-planned integration of education, training, and continuous development, if organisations are very keen to achieve real growth at individual and organisational levels.

According to the UNWTO (2005), the tourism industry has nowadays become the largest industry and generates large numbers of job opportunities. Haven–Tang and Jones (2006) argue that the negative impacts of tourism are that the tourism industry can offer mostly physical jobs and the working conditions are mostly poor, low paid and with long working hours. In addition, the tourism industry is characterised by a lack of training programmes and high turnover. For example, according to the CIPD (2004, cited in Haven–Tang and Jones, 2006), in the UK the overall employee turnover was 16.1 % in 2003 and the highest levels of turnover were recorded in the private sector

including hotels and restaurants at more than 50%. The researcher argues that HRD becomes a more critical issue not just in developed countries but also for new tourism destinations. The success of destinations relies upon the effectiveness and efficiency of the people who work in the industry and all HRD initiatives should take this into account as a vital function and which includes recruitment, selection, induction, motivation, training, and working conditions. Haven–Tang and Jones (2006) suggest that all tourism organisations including SMEs need to establish an effective HR function even if they do not have a specific HR department.

Due to it is sensitivity, the hospitality and tourism industry has exposed many vital challenges. Haven–Tang and Jones (2006) point out that demographic trends and negative images of the industry are caused by minimizing the number of young people being recruited which in turn makes the industry further associated with high turnover. Furthermore, Naama (2007) concludes that the cultural environment has great impact on the industry including the weak involvement of women and religion orientation. Payment and rewards can also be an issue, particularly when they are lower than in other industries. Haven–Tang and Jones (2006) linked the pay level and rewards to the value of the worker to the organisation and the value of the worker and the job to the marketplace. It can conclude that destinations have two main strategies for developing human resources in tourism industry, by recruiting qualified and skilled labour, and adopting an effective approach to improving the existing labour skills through training and development programmes. Nevertheless, destination managers should keep monitoring employees‟ performance to identify any gaps and future needs.

Destination environment issues

Tourism has a significant impact on the environment which can either be positive or negative. This issue was discussed in detail in Chapter Three. It is worth reminding the reader that keeping and protecting the environment is an important element in developing the tourism destination and a crucial element of the SCDM. The environment is concerned with the surrounding natural and physical objects, such as land, air, water, sun, animals, and insects which have a relationship with human beings.

> *Environment could be defined as the place, where humans live, which is an entirely anthropocentric statement, or simply as the dynamic conditions and the physical, chemical and social entities surrounding man.*
>
> (Salgot and Tapia, 2006, p.218)

Hunter and Green (1995 cited in Williams, 1998, p.105) summarised the potential impact of tourism on the environment (see Table 4.3). They assert that despite the fact that tourism has positive and negative impacts, negative impacts are fundamental and damage may occur and harm in many forms.

Table 4.3: Balance sheet of environmental impacts of tourism

Area of effect	Negative impacts	Positive impacts
Biodiversity	- Disruption of breeding/feeding patterns killing of animals for leisure (hunting) or to supply souvenir trade - Loss of habitats and change in species composition - Destruction of vegetation	- Encouragement to conserve animals as attractions - Establishment of protected or conserved areas to meet tourists demand
Erosion and physical damage	- Soil erosion - Damage to sites trough trampling overloading of key infrastructure (e.g. water supply network)	- Tourism revenue to finance ground repair and site restoration - Improvement to infrastructure prompted by tourists demand.

Pollution	- Water pollution through sewage or fuel spillage and rubbish from pleasure boats - Air pollution (e.g. vehicle emission) - Noise pollution (e.g. from vehicles or tourist attractions: bars, discos, etc.) - Littering	- Cleaning programmes to protect the attractiveness of location to tourists
Resource base	- Depletion of ground and surface water - Diversion of water supply to meet tourist needs (e.g. golf courses or pools) - Depletion of local fuel sources Depletion of local building-material sources	- Development of new/improved source of supply
Visual/structural change	- Land transfers to tourism (e.g. from farming) - Detrimental visual impact on natural and no-natural landscapes through tourism development - Introduction of new architectural styles - Change in (urban) functions - Physical expansion of built-up area	- New uses for marginal or unproductive lands - Landscape improvement (e.g. to clear urban dereliction) - Regenerating and/or modernisation of built environment - Reuse of disused buildings

Source: adapted from Hunter and Green (1995) cited in Williams (1998, p.105)

The balance sheet of the environmental impacts of tourism, identifies the damage that may occur in tourism attractions or in the destination due to tourism activities. A destination manager must take this damage into account in the destination planning stages and must minimise the negative impacts if they cannot avoid them.

Destination marketing strategies

Destination marketing is a difficult task, basically, due to the needs of different tourists and the different purposes of visits (Buhalis, 2000). The author believes that destination

marketing is difficult not merely because of differences in tourists and their needs and their purpose of their visit, but also because of the complexity of target markets, competition, and the nature of tourism products. Jamal and Getz (1996 cited in Hanlan *et al.,* 2006) and a number of other studies, assert the importance of destination planning and marketing but pay little attention to the implementation of marketing strategies and evaluation of effectiveness.

The marketing plan is a powerful tool for coordinating marketing efforts in order to achieve organisational objectives. The marketing plan has two levels: strategic and tactical. The strategic marketing plan considers identifying target markets, including market segmentation and positioning based on an analysis of the best market opportunities. The tactical marketing plan determines the marketing tactics, including product, price, promotion, channels of distribution and marketing communications.

Destinations that want to attract particular tourists should identify the segments they want to attract then target one or more segments in order to implement effective marketing tactics.

> *Many destinations with a variety of attractions have failed to attain their tourism potentials because their promotion is not themed of effectively targeted.*
>
> (Awaritefe, 2003, p.264)

Positioning analysis is required to understand how potential tourists perceive the destination and to build on attributes deemed significant to the target relative to the competition (Pike and Ryan, 2004). A study carried out by Zhao (2005) revealed that creating a positive image of the destination is an important function in the potential

tourists‟ information sources. Here, cultural factors have different influences in the pre-visit and during the visit stages which should be considered in destination implementing marketing strategy.

The main responsibilities of destination marketers are identifying the market‟s needs and wants and what destinations have to offer, including tourism resources. Understanding and meeting tourists‟ needs and wants and the extent of how destination competitors affect the tourism market is crucial. For this, destination managers or even tourism businesses have to undertake a SWOT analysis which enables managers to realise the strengths (S) and weaknesses (W) of their destination as well as identify the opportunities (O) and threats (T) that they face (Page, 2005). SWOT analysis, as proposed by Flavel and Williams (1996), is a valuable basis for evaluating the relative significance of a particular destination or a market (Hanlan *et al.,* 2006). While individuals have a burning desire to experience the exotic (Gunn, 1988), destinations must differentiate themselves from their competitors.

A number of studies identified certain challenges that have influence on the future marketing of destinations, including tourism product quality, the use of effective channel distributions and destination branding (Fyall and Leask, 2006). The author argues that quality is the key to the success of destination marketing, especially in the long-term.

Service quality

Destinations can use service quality as a strategic tool for competitiveness (Ekinci *et al.,* 2003), however, for some destinations, service quality is a challenge and remains

unreachable objective. Murphy *et al.* (2000) asserts that the concept and definition of destination quality and value are somewhat vague in tourism literature. This is because a number of users of the term have different perspectives and priorities. A number of destination managers" point out that quality and value is a critical objective for revitalising their flagging tourism industries. Hudson and Shepherd (1998, p.61) argue that:

> *Service quality has been increasingly identified as a key factor in differentiating service products and building a competitive advantage in tourism.*

Gronroos (2000 cited in Kandampully and Kandampully, 2006, p.94), added that:

> *Today firms compete on the basis of services provided, not on the basis of physical products.*

According to Jones and Haven-Tang (2005), service quality is the key to competitive advantage. Service quality has been considered a critical issue in the tourism industry for decades, and achieving a high quality has made customers more sophisticated and demanding. However, the relationship between quality services and variables including: investment return, costs, productivity, sales growth, prices, customer satisfaction and loyalty has been carried out as the basis of much current research (Anderson and Fornell, 2000 cited in Jones and Haven-Tang, 2005).

Hunt (1975, p.7) suggests that:

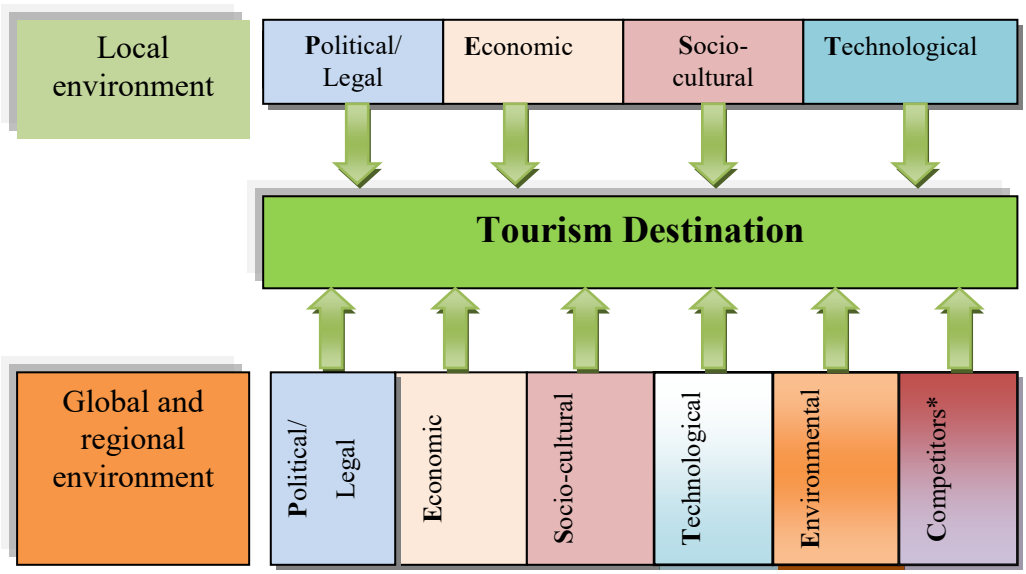
> *The perceptions of potential visitors to a tourist-recreation region may weigh very heavily upon the development and eventual success of that region.*

Augustyn and Ho (1998) identify three main strategic opportunities available related to tourism quality: (1) improving the specification and provision of the service quality "product"; (2) understanding the needs of visitors more fully and tailoring provision accordingly; (3) encouraging brand loyalty by achieving a better match between a specific quality of service and the perceived needs of a known customer segment.

4.4.7 The impacts of the global environment

Increasingly global environment have had significant impact on tourism destinations. This pressure comes from four common forces in marketing: **P**olitical; **E**conomic; **S**ocial and cultural; **T**echnological (PEST). Several authors in the destination marketing field add that the ecology or environment (Jain, 1985 cited in Cooper, 1995, p.191), geographical forces, climatic and environmental forces (Ritchie and Crouch, 2003), natural forces (Kotler *et al.,* 2005), the regulatory and ecological/natural environment (Freitag, 2008) all influence the destination. Indeed, each scholar sees that destination is influenced by many forces although they mainly agree upon the basic PEST forces. Destinations are exposed to impacts from two dimensions; local forces and global forces as illustrated in Figure 4.15. The author suggests that global forces are wider than local forces by adding environmental and competitor forces. Above all, Wild *et al.* (2008) point out that the external business environment is divided into three categories, national, international and global, which have significant impact upon tourism development, and should be addressed and considered in planning and managing destinations.

Figure 4.15: Local, regional and global forces acting on tourism destination



Adopted from: After Jain (1985, p.252 cited in Heath and Wall, 1992, p.33), Kotler *et al.* (2005, p.95). * added by the author.

The concept of the global environment means the forces of other countries, regions, unions and or continents, where intentional forces focus on specific markets, countries or regions (Lumsdon, 1997). Destinations are influenced by major forces in the external environment over which they have no control. The major forces behind economic equilibrium of communities are rapid technological change, global competition and political power shifts (Kotler *et al.,* 1993).

Tourism is an open system, which affects and is affected by the surrounding environment. Kotler and Armstrong (2007) note that any organisation or destination is subject to many influences and pressures, called macro-environment and micro-environment. The difference between them is the distance to the organisation or to the destination. While micro-environment is closer and seems to be local, the macro-environment refers to global forces. The global environment needs to be monitored

regularly, and changes that have impact either directly or indirectly on the tourism industry need to be considered.

> *Tourism is becoming an increasingly global and complex phenomenon, with political, economic, social, cultural, environmental, and educational dimensions.*
>
> (Daher, 2007, p. 4)

Destinations could not compete in global markets, without conducting market research and gathering sufficient information about target markets. In this context Hollensen (2007, p.153) claims that:

> *Lack of familiarity with customers, competitors and the market environment in other countries, coupled with the growing complexity and diversity of international markets makes it increasingly critical to collect information in relation to these markets*.

A political environment is usually combined with legal issues and comprises two dimensions. The destination political/legal environment and the host country political/legal environment or if there are any existing international laws and regulations implemented by international organisations.

Terpstra and Sarathy (1994) highlight the fact that the political environment of international marketing includes any national or international political factors including constitutions, laws, regulations, and policies that are issued by governments and have impact on the tourism industry. These comprise three dimensions; the host-country environment, the international environment, and the home-country of visitors" environment. A recent example can be given here indicates the influence of political challenges, the conflict on the power often result on negative impacts on tourism industry, international arrivals in Kenya collapsed after the post-election civil unrest in December 2007 (UNWTO, 2008).

On the other hand, there are a number of economic factors influencing tourists" behaviour which include economic growth, inflation, interest rates, exchange rates the availability of using credit cards and economic stability (Heath and Wall, 1992). Both local and global economic forces have implications on destination tourism development. However, local and global forces are not equal. A good example can be introduced here to explain how the economic environment can affect tourists" preferences. In the late 1990s when many Southeast Asian economies and currencies collapsed, (Asian contagion) the area became a bargain for travellers from other regions of the World (Freitag, 2008).

The socio-cultural environment is concerned with human population includes demographic trends, population size, density, location, age, gender, race, occupation. This is also related to tourists" perceptions, preferences, attitudes and behaviours (Kotler *et al.,* 2005). Hollensen (2007) states that the importance of culture to the international marketer is essential, where some cultures are easier than others to manage, regarding language, religion and customs. However, analysing data of tourism markets is essential in identifying the potential tourists" perceptions and behaviours. These factors should be considered the preparation stage of tourism plans. Destination managers and marketers should be aware of the socio-cultural impact on local communities and the tourism industry as a whole. This issue was discussed in detail in Chapter 3.

Technology plays a significant role in reducing the costs of processing transactions and facilitating record keeping, but recently it has become a more important strategic tool for gaining competitive advantage (Ribbers, 1994 cited in Sheldon, 2001). Tourism

destination websites have become a powerful tool in influencing the tourist decision-making process. In this context, the first moments of opening a website are extremely important (Kim and Fesenmair, 2007). Massis *et al.* (2007) note that in the global tourism industry, information communication technologies play a great role in providing very effective ways for the diffusion of information, promotion, and business transactions. Distribution has recently been seen as a critical weapon in tourism competitiveness. Adopting appropriate distribution channels effectively allows destinations to build bridges with potential tourists, identify their needs, wants and facilitates purchasing tourism product mechanisms (Buhalis, 2003).

> *The substantial increases in the volume of tourist information available as a consequence of rapid technological change, globalization, and the blurring boundaries of competition are the main reasons that both consumers and destinations face complexity. As it is difficult for tourists to form a clear image of a destination without the actual experience, the multimedia interactive nature of the Web can add a whole new dimension to destination marketing.*
>
> (Govers and Go, 2003, p.53)

According to Sheldon (1993), tourism is recognized as being very information intensive. Information has been described as the lifeblood of the industry and without it the sector would be incapable of functioning. Tourists seek information before they make a visit in order to assist them in evaluating the alternative places in the decision-making process. In addition, information is needed during the visit as the trend towards more independent travel increases (O"Connor, 2000). Technology refers to methods, equipment and tools that are used in tourism destinations, facilitating tourism activities These include land transportation, air transportation, computer systems, communication systems and other technologies that destination management organisations need.

According to Kotler *et al.* (2005, p.90) the marketing concept states:

> *To be successful, a company must provide greater customer value and satisfaction than its competitors do*

Destinations face huge challenges from other competitors. The previous models such as Hasan (2000); Ritchie and Crouch (2003) and Dwyer and Kim (2003) for developing tourism destinations ignore the influence of the competitors in destination development. Destination managers and marketers cannot implement any marketing strategy without looking to their competitors‟ strategies, including the products, packages, prices, promotions, and channel distributions they are using. Also, destinations must differentiate their tourism products from their competitors and ensure that all stakeholders are satisfied, not only their customers.

4.5 Developing a Sustainable Competitive Destination Model (SCDM)

The main task for tourism researchers is in this area is to provide an analytical and policy framework within a dynamic development process in order to determine an appropriate sustainable pathway (Hall and Richards, 2003). As discussed in the previous chapter, there are a number of models for destination sustainable competitiveness approaching tourism from different angles, rather than considering tourism as a whole industry with a comprehensive view of all factors impacting on this sensitive industry. This conclusion is also shared by Dwyer and Kim (2002), as well as Heath (2003), who argue that:

> *Despite all the discussions on competitiveness no clear definition or model has yet been developed*
>
> (Dwyer and Kim, 2002, p.2)

> *Existing models do not appear to adequately provide an integrated treatment of the various issues surrounding the concept of competitiveness and do not place sufficient emphasis on the key success drivers (people) and the vital linkages that need to be considered when developing a comprehensive framework of sustainable destination competitiveness*
>
> (Heath, 2003 cited in Dwyer and Kim, 2003, p.376)

The sustainable competitive destination models discussed in the previous chapter form the basis for understanding how destinations can compete and survive in the global environment and ultimately achieve sustainable competitiveness. The idea of building the SCDM has passed many stages through the adaptation of Leiper (1979) approach, which link the relationship between the destination and tourist market as a demand and supply power. According to Leiper (1979) tourists want to visit and experience the tourism destination, on the other side, destinations attempt to meet the tourists" needs and wants, however, with increased competition in the tourism market, marketing destination is crucial factor to enhance destination image and attract more tourists.

The SCDM is a comprehensive framework which attempts to gather all tourism issues, elements and factors together in a systematic approach. Second stage of building the SCDM considers identifying the tourism product as a comparative advantage, which include (natural resources, heritage resources, cultural resources aerated resources) beside supporting resources and facilities which include (accommodation, transportation, infrastructure and facilitating resources). It also pays particular attention to stakeholders, to ensure that all participants involved in the tourism industry are considered and play a positive role, (see Figure 4.16).

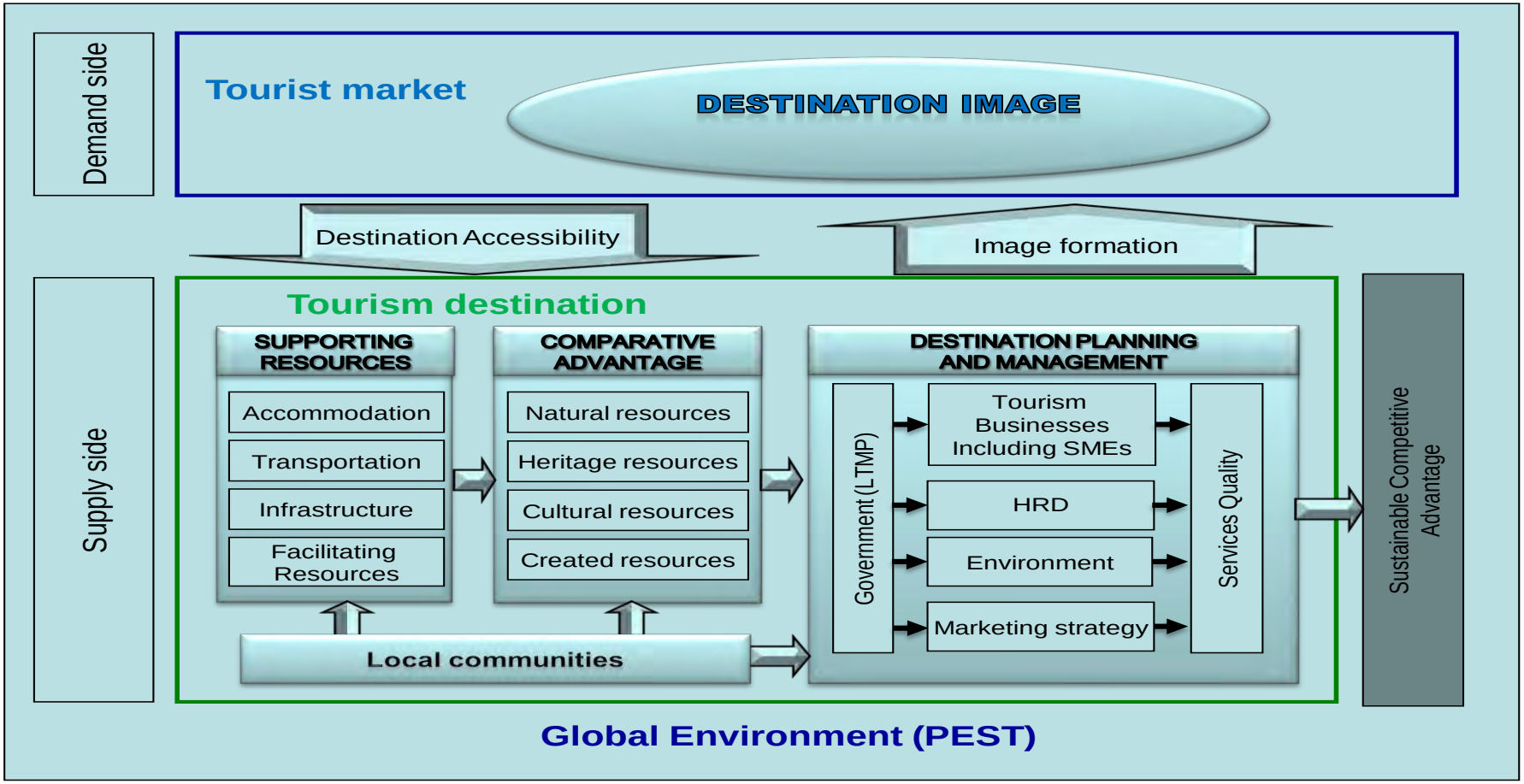
SCDM includes the main stakeholders, as discussed in the IQM and EFQM models, which are the visitors, local communities and tourism enterprises. SCDM considers the Ritchie and Crouch (2003) model which provides an essential base and valuable elements for destination competitiveness, such as core resources, supporting factors and resources and destination management.

The SCDM also adopts Jones and Haven-Tang‟s (2005) idea of the role of government in tourism development. They named the governmental role as the „public sector‟ (whereas the EFQM model uses the term „leadership‟, they highlighted the significant task of the government for developing human resources. However, Jones and Haven-Tang‟s use the term "employees" in their model, the term „human resources‟ is more acceptable in this study which employees may understand being the low level of administrative and operational staff. SCDM consists of two sides, demand side and supply side. The demand side focuses on the target market and the supply side considers the destination as an integrated system leading to sustainable competitiveness.

SCDM as a systematic model presents the relationship between tourism destinations (supply side) and tourist markets (demand side). The main task of tourism destinations is to present an attractive image in potential visitors‟ minds in tourist markets, this image is often formed by the media, tour operators, trust and connectivity, and positioning and branding. However, the flow of tourists may obstructed by many barriers such as visa procedures, legislations, distance.

Additionally, tourism destinations have responsibility for planning and managing their tourism product: this includes the natural resources, heritage, culture, accommodation, transportation, infrastructure and facilitating resources. In this context, the government should take the lead role for tourism development. Local communities are a crucial element in tourism development; hence, local communities should be involved in the process of destination development. The model also highlighted the significant impacts of global environment upon tourism development. It can be concluded that SCDM is a comprehensive model which can be used as guidance for destinations‟ development. The SCDM elements will be the core analysis of the field work and the coming chapters.

Figure 4.16 Sustainable Competitive Destination Model (SCDM)



4.6 Summary

Destinations cannot survive in global competition without developing effective plans and adopting strategies built on by exploiting and employing their resources and marketing activities whilst taking into account the impact of global environments. This chapter has developed a Sustainable Competitive Destination Model (SCDM), which is a comprehensive model containing the main issues, elements and factors that have direct or indirect influence on the tourism development. As we have seen, the model is based on previous models and theories of tourism development and competitiveness, the SCDM is built through many stages, each stage identifies and addresses a specific concept (tourism system; tourism products; destination management). Service quality is a key of success of competitiveness, the model also considered local communities as a crucial factor for tourism development. Some elements are discussed in more detail than others due to their importance and use in serving the fieldwork outcomes. Chapter Five will provide a general background about Libya as a tourism destination.

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Chapter 5: The Libyan context

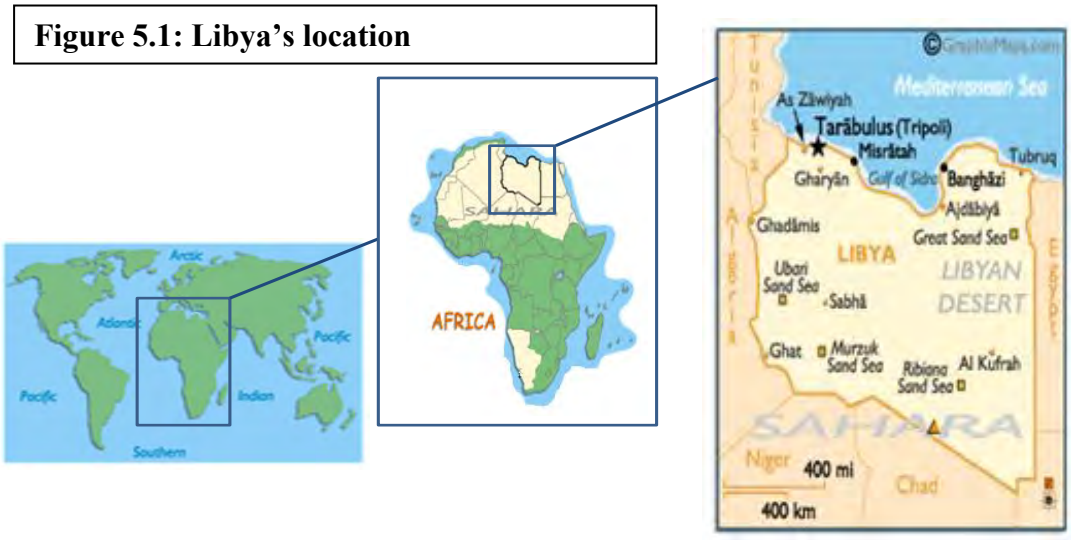
5.1 Introduction

Chapter five provides a broad outline of the Libyan tourism industry. It discusses in detail the Libya‟s history, political system, economic trends, culture and tourism attractions. Libya has ambitions to be a competitive tourism destination in the MENA region. This chapter therefore begins with general information about Libya and then attempts to describe the Libyan image internationally, focusing in particular on the British press. Chapter five also discusses Libyan accessibility procedures and highlights what Libya has to offer as a tourism destination (natural resources, heritage, culture, accommodation, and infrastructure). It also reviews the Libyan tourism planning and management and gives some indication of the impact of global environments.

5.2 Background

Libya has a strategic geographical location in the middle of North Africa, which makes it a vital link between the eastern and western countries of the Arab world, and between Europe and Africa. The formal name of Libya is the Great Socialist People‟s Libyan Arab Jamahiriya, which extends over 1,750,000 square km, and therefore is the fourth largest country in Africa and slightly larger than Alaska (CIA, 2009). It lies between latitudes 18˚-33˚N and the longitudes 9˚E and 25˚E; it is bordered by Egypt from the eastern side, Sudan to the south-east, Chad and Niger to the south with Algeria and Tunisia to the west and north-west respectively (Sugranes and Koop, 2006) (see Figure 5.1).

Figure 5.1: Libya's location



Source: World Atlas (2009)

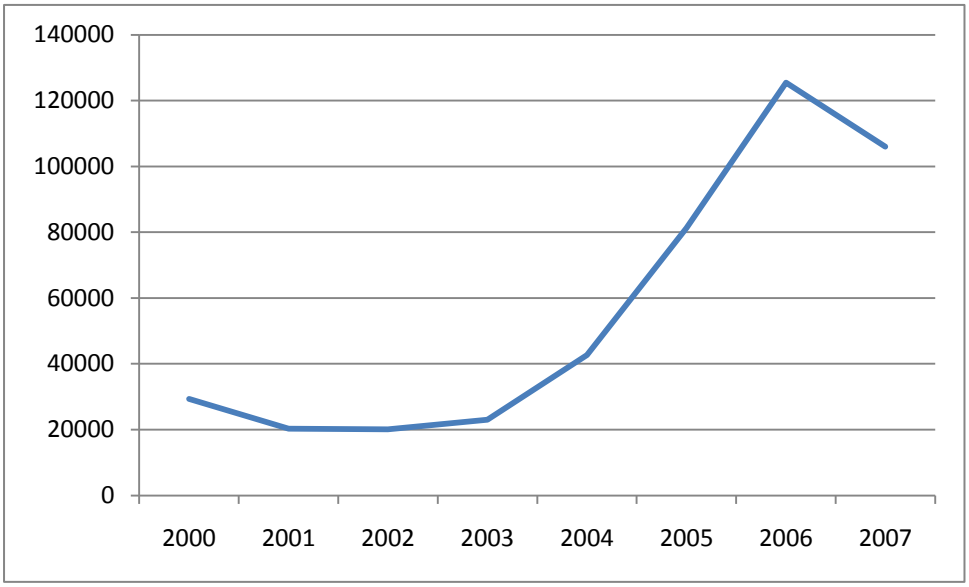
Libya possesses a Mediterranean coastline of 1,770 km and an area of 1.759 million square kilometres, which makes it seven times bigger than the UK, but with a small population and a large land area. The Libyan population grew by 1.8% in recent years, to reach 6,310,434; this included 166,510 non-nationals in 2008. According to Libyan demographic trends, most of the Libyan nation is composed of younger people: 33% of the population are less than 14 years old, 62% between 15 and 64, and older people represent a mere 4% (CIA, 2009).

Travel and tourism is an important sector for most Middle Eastern and North African countries and is a vital source of foreign exchange, a generator of employment opportunities and a means of helping some countries reduce their dependency on other sectors of the economy, particularly finite resources such as the oil industries (Tourism

Market Trends, 2003); „*Libya is just beginning to position itself as an emerging spot on the world tourism map*" (Oxford Business Group, 2008, p. 62).

According to the General Board of Tourism and Traditional Industries (GBTTI) 2008), international arrivals increased from 81,319 in 2005 to 125,480, but later, in 2007, the number fell to 105,997 as a result of new procedures implemented in Libya in November 2007 when all international arrivals were required to have a translation page in Arabic in their passports. Figure 5.2 illustrates the dramatic rise and decline of international tourists.

Figure 5.2: International arrivals from 2000 to 2007

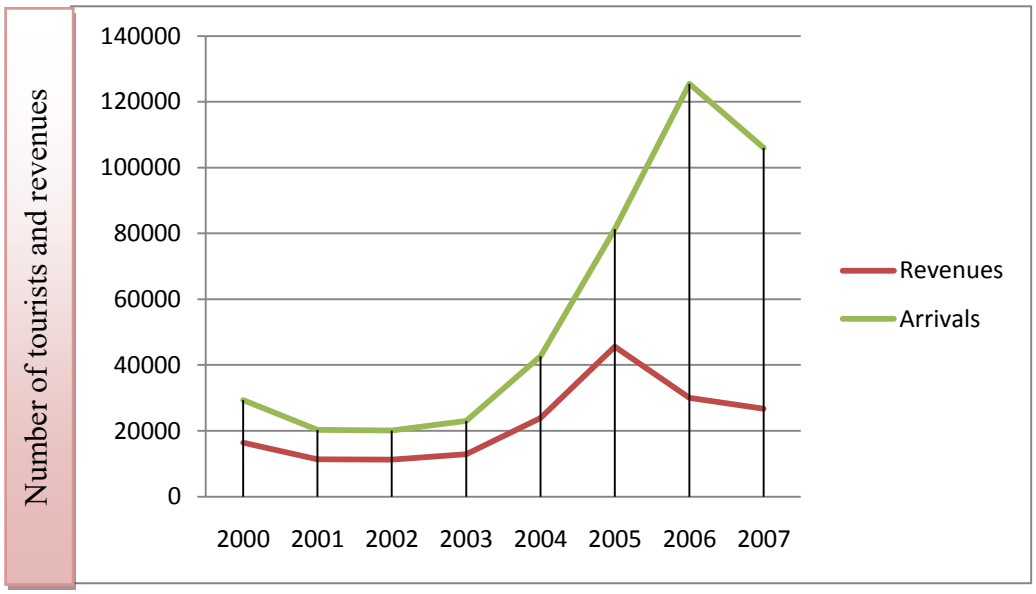


Source: GBTTI (2008)

Clearly, therefore, travel and tourism are a source of national income, and particular destinations have prepared plans and strategies to increase tourism revenues. However, the total revenue gained from tourism declined from 45 million Libyan Dinar, to 29 million Libyan Dinar in 2006. The initial impression and analysis is that this is the

result of declining international arrivals, but the reality is different (see Figure 5.3). The total revenue is calculated by taking the number of international arrivals and multiplying this by the average amount of money spent; this works out as $80 multiplied by the average length of stay, which is 7 days. For example, as shown in Table 5.1, the 2000 revenues are calculated as: 29,302 x 80 x 7 = 16,409. Surprisingly, these revenues dropped from 45 million in 2005 to 29 million in 2006, despite the number of international arrivals increasing rapidly by more than 54%.

Figure 5.3: International arrivals and revenues



Source: GBTTI (2008)

Table 5.1 International arrivals and revenues

	2000	2001	2002	2003	2004	2005	2006	2007
Tourists	29,302	20,339	20,075	23,029	42,638	81,319	125,480	105,997
Revenues	16,409	11,389	11,242	12,896	23,877	45,538	29,980	26,731

Source: GBTTI (2008)

Information and statistics about Libyan tourism industry are not just rare and unavailable; they are also unreliable. Even the UNWTO has insufficient information about Libya and has not been updated. Hence, this study tends to use foreign sources of information rather than local ones. Table 5.2 summarises the Libyan tourism activity in 2007. This view is also shared by the British Ambassador, who noted that Libyan statistics are not available. He added, „*you cannot easily see who in government is responsible for a subject, who takes decisions on it and on what grounds*" (Abdulmajid, 2005, p.4).

Table 5.2: Summary of Libyan tourism activity in 2007

Activity	statistics
Total number of tourists	105,997
Tourists (overnight visitors)	38,025
Cruise passengers	67,972
Overnight stays in hotels	266,157
Average length of stay	7
Average spending of tourists per day	80 US$
Total estimated income	26,731,670 US$
Total number of cruises	83
The number of guests in hotels and similar establishments	432,347
Total number of hotels	268
Total number of rooms	13,638
The total number of classified hotels	62
Total number of classified rooms	6402

Source: GBTTI (2008)

The main nationalities of international arrivals are Italians, French, Germans, Britons, Spanish and other European nationalities, as presented in Table 5.3. The total number of tour operators and travel agencies was calculated as 707 in 2007 (GBTTI, 2008).

Table 5.3: Nationalities of the main international arrivals

Country	2004	2005	2006	2007
Italy	12,845	19,017	31,341	30,966
France	6,158	19,299	27,636	18,946
Germany	3,021	11,654	17,927	17,038
UK	1,367	7,209	16,274	13,533
Spain	850	2,126	4,279	5,469
Austria	1,133	2,334	4,151	3,285
Belgium	*	*	*	2,382
Switzerland	1,025	1,931	3,195	2,402
Netherlands	*	*	*	1,718
Poland	*	*	*	1,640
Japan	944	2,187	3,014	1,434
USA	778	2,846	1,677	*

Source: GBTTI (2008, p.2). (notice * data are not available)

The above Table shows that the UK market is less important for Libya than the markets of Italy, France and Germany, and the statistics are probably a good reflection of leisure travellers, despite the significant growth in UK visitors, which increased by more than 800% from 2004 to 2007.

International arrival statistics do not include visitors entering Libya without passports and visas. This is a particular problem in relation to access across Libya‟s southern borders with Niger, Chad, and Sudan, as there are no border controls in operation and

these people enter Libya to seek employment or are passing through to Europe. The Italian Prime Minister, Silvio Berlusconi, stated in a meeting held in Libya, „We clarified the importance of collaborating on illegal immigration to find a solution to a problem which is not only Italo-Libyan, but European and African" (BBC News, 2004c).

There are possibly around million people in Libya trying to make the journey toward Europe illegally (Fraser, 2008), and nearly 37,000 immigrants landed on Italian shores in 2008 (BBC News, 2009d). According to a representative of the EU, Libya has recently made great efforts to stop African illegal immigration to Europe though the country (GPC report, 2006). Clearly these efforts are ineffective as the BBC had previously reported on this matter on 26th August, 2004, stating that it is due to the 9,654 km borders, 1,700 km of coast open to Europe and the lack of developed equipment that Libya is unable to prevent illegal immigration. The EU Justice Commissioner, Jacques Barrot, indicated that Libya is regarded as one of the transit points for illegal African immigrants heading to Europe in search of better lives; he added that Tripoli estimates that there are around two million people on Libyan territory who wish to emigrate to Europe (EU Businesses, 2009). The main purpose of presenting this information is to indicate the significant numbers of African people who enter the country from its southern borders illegally without being accounted for.

In tourism terms, Libya has been the best-kept secret of North Africa. However, over recent years it has opened up to the world and become a northern gateway to Africa (Dabrowska, 2005). Mr. Eltayef, the secretary of the GBTTI asserts that:

> *Egypt has been a player in the tourism sector for over forty years; most tourists are familiar with it. Libya is a new territory for tourists; it's undiscovered and unvisited, so there is an element of mystery to it that tourists want to discover. I believe in the tourism sector more so than in the oil sector here. Oil is a non-renewable resource and it will not last forever. Tourism can last for centuries.*
>
> (United World, 2006, p.1)

The Akhbar Libya newspaper reported on 27 July 2006 that Mr Eltyef maintained that although his country is an important oil producer and a member of the OPEC, the country is planning to attract more than 10 million tourists by 2015. In a similar vein, Dr. Ghanem, the Secretary of the GPC for Economy and Trade, asked about alternative investment opportunities in her fields other than the oil industry and asserted:

> *Tourism can also offer a lot of potential if the necessary investment in infrastructure is provided. That is the word in the mouth of every single Libyan and foreign businessman who knows the country: Potential. The boom that everybody expected in the tourism sector, especially since the lifting of the sanctions, is yet to come.*
>
> (World Investment News, 2003, p.1)

Alcantara (2004) claims that Libya‟s tourism is rare, unspoiled and ripe for investors; after 20 years‟ of absence, the country now has the opportunity to develop its tourism industry. Tourism is the most promising sector besides the oil industry and could soon be a main source of national income for Libya once the proper infrastructure is provided (Benyala, 2009). Mustafa Tayeb, the chairman of the Libyan Foreign Investment Company, when asked in an interview about investment in the tourism sector, stated that tourism would be the highest in ranking, because it is a valuable product and has a potential demand (World Report International, 2007). Figure 5.4 shows the diversity of tourism attractions and sites across the country, including about 2000 km of beaches, huge desert, oases, Roman and Greek antiquities and evidence of prehistoric civilisations.

Figure 5.4: Libya's tourism attractions

Source: Sukra travel and tourism services (2009, p.2)

5.3 The Libyan image in the UK market

Chapters three and four discussed in detail the importance of the destination image, and it was concluded that destinations mostly have to compete in foreign target markets on image; a number of studies have indicated that destinations with a strong attractive image are most likely to be visited, while tourists avoid negative image destinations. This section discusses the relationship between Libya and Western countries, particularly the UK and USA, as this determines the features of the Libyan image abroad.

Section 5.3 gives an account of the relationship between Libya and the West. Since the early stages of the Libyan revolution in 1969, the relationship between Libya and the West (including the UK) became aggressive, especially when Libya expelled the English military base Al-Adam, later named Jamal Abd-Alnasir, on 3rd March, 1970. In addition, the US agreed to leave Almllaha military base near Tripoli on 11th June, 1970 (Khaddouri, 2005). According to Lahwej (1998), the relationship between Libya and the West, particularly the USA, is complex and characterised by conflict and mistrust on both sides.

In the 1970s and early 1980s there was another period of poor relations between Libya and the US and Western Europe; Libya was widely suspected of supporting and financing many international liberal movements around the world (Ighneiwa, 2005). Furthermore, some observers noted that the major cause of American alarm was Qudaffi‟s support of radical groups worldwide (Lahwej, 1998). This orientation, made Western countries angry and worried about the use of oil funds to promote Qudaffi‟s ideology outside Libya (CIA, 2004).

Libya‟s image was so poor that when a British police officer was killed in front of the Libyan People's Bureau (Embassy) in London in 1984 (Buchanan, 1984), and Libya was also accused of bombing a Berlin night club and targeting American soldiers in 1985, diplomatic relations between Libya and the United States were severed. The US, with the support of Western Europe responded to these actions in 1986 when American aircraft attacked many Libyan cities, including Tripoli and Benghazi, killing a number of civilians, including Qudaffi‟s adopted daughter (Cordell *et al*., 2009).

The silent war between the US and Libya reached a critical stage when Libya was accused of the bombing of the Pan American aircraft over Lockerbie in Scotland on December 21, 1988, killing 259 people on board and 11 on the ground (Rosenberg, 2000). The US and Western countries then went to the United Nations and imposed sanctions on Libya in 1992 and 1993 on the basis of suspected Libyan involvement in the explosion of the Pan Am aircraft, and this left Libya internationally isolated for about 10 years (European Commission External Relations, 2005).

Qudaffi attempted to forge unity with other Arab states, but met with little success. In the 1990s, Qudaffi turned to Africa and proposed a United States of Africa; the concept later became established as the African Union (BBC News, 2009b). In 1999, Libya received confirmation from the majority of African countries that its isolation was being broken, but Arab countries showed no support for Libya. The consequence of these efforts was the suspension of UN sanctions in late 1999; in fact, in this period there was a tendency from sides, Western countries and Libya, to resolve suspension issues. A senior British official declared: „Libya in 2001 is very different from Libya in 1988" (Sengupta, 2001).

After three decades of international isolation, Libya is still an unknown destination for most Western tourists, even though it has stunning attractions and unique tourism products. In addition, the Western media has drawn a negative image of Libya because of its difficult relationship with Western countries and it is often described as a terrorist sponsor; even after resuming relations with the West, some still see Libya as a strange and confusing place for visitors (BBC News, 2000).

On 12th December, 2003, an agreement was reached between the United States, the United Kingdom and Libya on the Lockerbie case. In August 2003, Libya accepted responsibility for the Lockerbie case and acknowledged that it should pay compensation and renounce terrorism (European Commission External Relations, 2005). Shukri Ghanem, the secretary of the General Peoples Committee (GPC), told the BBC Radio 4 programme on 24 February 2004 that damages were being paid to buy peace and escape sanctions; he denied that Libya had played any part in the shooting of the policewomen in 1984 in London or had any links with the bombing, declaring that Libya had made the compensation offer merely to buy peace with the West (BBC News, 2004e).

Libya then made extraordinary efforts to eradicate suspicion and took a remarkably positive step when it agreed to allow a snap UN nuclear arms inspection (Scotsman, 2003). Shukri Ghanem, the Libyan Prime Minister, stated „*we thought this would make us look better in the eyes of the world and set an example for others in the Middle East to follow, especially Israel*" (Biles, 2003, p.1).

Since the UN sanctions were lifted in 2003, Western politicians, including British, Italian, French and German leaders have visited Qudaffi (BBC News, 2009b). The UK reopened its embassy in Tripoli in 2002 which was followed by the historic visit of Tony Blair to Libya in March 2004, so paving the way towards good relations with Western countries. This visit sent a signal to potential tourists that Libya was now a safe destination (Wheeler, 2004; Global Times, 2009). Saif al-lslam Qudaffi stated in an international conference regarding Libya"s opportunities and challenges in October 2004:

> „*I think finally the international community has been able to understand that Libya and the Libyans are not terrorists*".
> (Qudaffi Charity Organisation, 2005, p.1)

Moreover, the relationship between Libya and the US resumed in the spring of 2008 after signing a deal to compensate all the victims of the bombing and involving the two countries (BBC News, 2008b). This step was followed by a visit from the Secretary of State, Condoleezza Rice, resulting in the raising of the American flag in May 2009 for the first time in 30 years (Global Times, 2009). It made it clear that Libya was now a partner and was free for tourists and investors (particularly US oil producing companies), although Americans still had some fears about human rights in Libya (Dunne, 2008). The language of this dialogue has characterised the relationship between Libya and the West and in July 2009 Qudaffi was invited to the G8 summit and in his capacity as the president of the African union he discussed political and economic issues with Western leaders, including Gordon Brown (BBC News, 2009a).

Libya moved into the 21st century with the desire to become part of the international community and with tremendous ambitions to take significant steps towards the peace process worldwide. Nevertheless, there is little doubt that the previous hard period has left a negative image, particularly in the West. Improving Libya"s image is not an easy mission and will take years of real effort if Libya seriously wishes to become a competitive tourism destination.

> *Despite being the home of* prehistoric civilizations *and* mythical mysteries*, Libya still ranks among the least explored countries in the world. Most people still have the old idea that Libya is downright dangerous to travel to, and is a sponsor of International terrorism. These ideas were generated and popularised by the American and western media as a result of Libya's political history and stand against*

> *oppression. In reality, however, Libya never was a dangerous country for foreign visitors.*
>
> (Nesmenser, 2008, p.3)

This is an important issue because Libya must be aware of its image abroad and understand how tourists perceive the country in order to adopt and implement strategic decisions and policies. In this regard, the Qudaffi International Association for ChariTable Organizations, led by Sief al-Islam, Qudaffi‟s son, is making extraordinary efforts to improve Libya‟s image abroad and developing the country (BBC News, 2003).

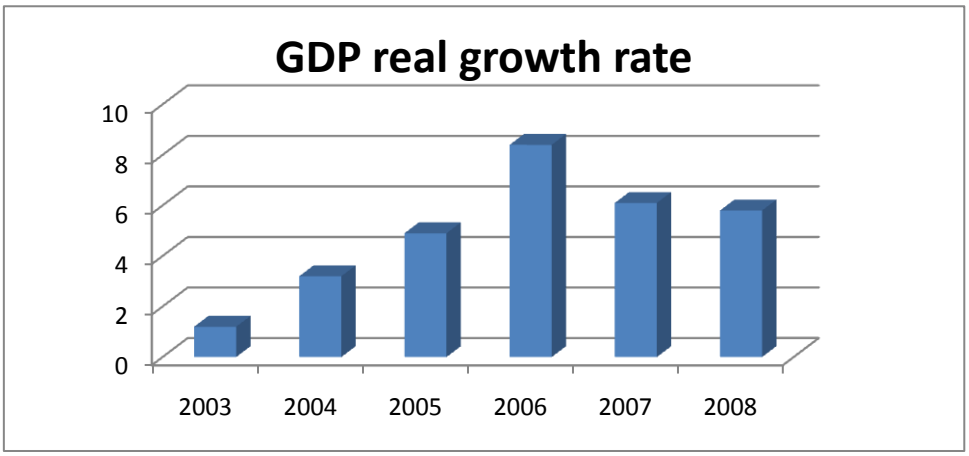
5.4 Global environment

Libya is a member of the United Nations and it is attached to agencies such as the United Nations World Tourism Organisation, the World Trade Organisation, the United Nations Educational, Scientific and Cultural Organisation, and numerous other international organisations. Membership to these organisations as well as international agreements and laws place Libya under a certain amount of international pressure as Libya must respect its agreements and fulfil international requirements. Developing Libya as an internationally competitive tourism destination should take international rules and regulations into account. In addition, the implementation of marketing strategies requires a comprehensive analysis of the competition. It should also be pointed out that tourism is a sensitive industry and foreign threats, such those of the al-Qaeda organisation and extremists, cannot be underestimated. Development of the tourism sector is therefore influenced by the economic situation, political stability and orientation, environmental issues and socio-cultural factors.

5.4.1 Libya's economy

According to Ghattour (2004) and the World Factbook (CIA, 2004), the Libyan economy relies primarily upon oil revenues, which contribute practically all the export earning and about one-quarter of GDP. These oil revenues, combined with a small population, give Libya the advantage of the highest per capita GDP in Africa. In addition, there is strong evidence to suggest that Libya has made a great deal of progress on economic reform as part of a broader campaign to reintegrate the country into the international fold; Libyan officials have announced a new strategy to liberate its economy and have taken significant steps toward privatisation (CIA, 2005). The Libyan General People‟s Congress (GPC) has also decided to completely open its doors to local and foreign investment and to free such investors from taxes, as well as to provide more facilities and opportunities to industries such as tourism, fishing and agriculture with the aim of diversifying the economy away from oil (Geblaoui, 2004). Despite the World economic crisis, Libya‟s GDP growth rate achieved 6.1% and 5.8% in 2006 and 2007 respectively (Indixmundi.com, 2009) (see Figure 5.5), compared with -4.1 % in the UK (Trading Economics, 2009).

Figure 5.5: Libya's GDP real growth rate from 2003-2008

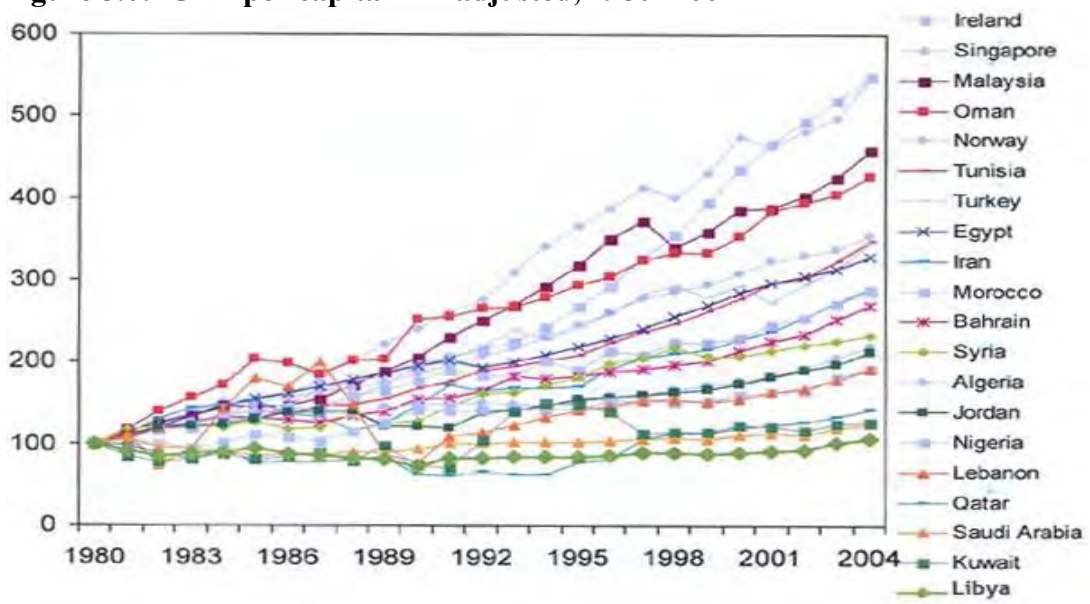


Source: Indixmundi.com (2009)

Oil export revenues account for over 95% of Libya‟s hard currency earnings (and 75% of government receipts). With higher oil prices since 1999, the Libyan oil export revenues increased to $18.1 billion in 2004 and are expected to reach $19.4 billion in 2005, up from $5.9 billion in 1998. Libya is hoping to reduce its dependency on oil as the country‟s sole source of national income, and to increase investment in profiTable sectors such as agriculture, tourism, fisheries, mining and natural gas (Energy Information Administration Report, 2005). Muammar Qudaffi has highlighted critical criticism to the government‟s achievements. He argues that the country needs to stop relying exclusively on imports and becoming a consumer society (Goncalves, 2006).

According to the Libyan Economic Development Board (EDB) (2007), despite a strong economy, the prosperity of Libyan people is low compared to other countries, including MENA countries. Economic analysts attribute this to the hard economic environment over many years combined with the rapid growth of the population. Figure 5.6 shows the rate of the Libyan people‟s prosperity. The EDB is confident that Libya has a good opportunity to improve its economy and provide the people with prosperity, and significant steps have already been taken in this regard.

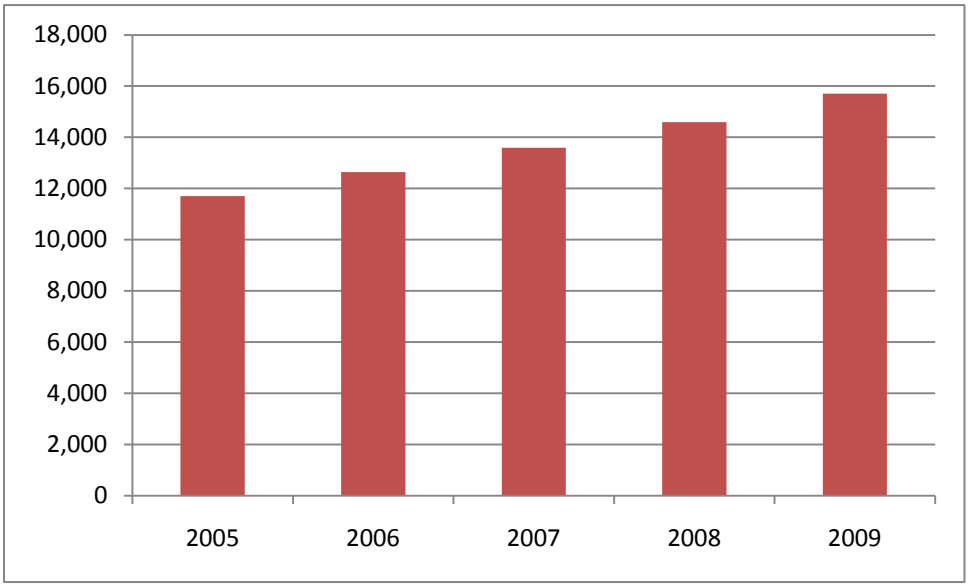
Figure 5.6: GPD per capita PPP adjusted, 1980- 2004



Source: IMF, monitor analysis, cited in EDB (2007, online)

According to Economy Watch.com (2009), Libya"s GDP per capita has increased from $14,593 to $15,709, which has made Libya jump to number 57 in the world rankings, according to the GDP per capita (PPP) in US Dollars in 2008. Figure 5.7 shows the stable growth of Libyan GDP per capita.

Figure 5.7: Libya's GDP per capita (US$)



Source: EconomyWatch.com (2009)

Saif al-Islam, Qudaffi‟s son, worked together with Professor Michael Porter, from the Harvard Business School to implement a plan for developing the Libyan economy and to diversify it away from oil domination (Reed, 2007a). This accounted for 60 per cent of GDP; according to OPEC organisation reports, Libya produced about 2.23 million barrels of oil and gas daily in 2006. Wood Mackenzie, Edinburgh consultants, maintain that Libya‟s location near to Western Europe gives her an opportunity to be a significant energy player (Reed, 2007b). Italy was the main market of Libyan exports with 42.5 per cent, followed by Germany with 9.8 per cent, then Spain, and Brazil in 2007 (Albayan, 2008). Layden Anthony, the British Ambassador, declared in a speech about Libya regarding opportunity and challenge that „Libya now has to achieve new standards of prosperity and well-being for its people, and it is a challenge for its leadership to make such an achievement a reality‟ (Abdulmajid, 2005, p.1).

> *Despite the country"s recent economic growth, however, unemployment remains high. In addition, Libya has an unclear legal structure, an arbitrary government decision making process, and a bloated public sector (as much as 60% of government spending goes towards paying public sector employees salaries).*
>
> (Energy Information Administration Report, 2005)

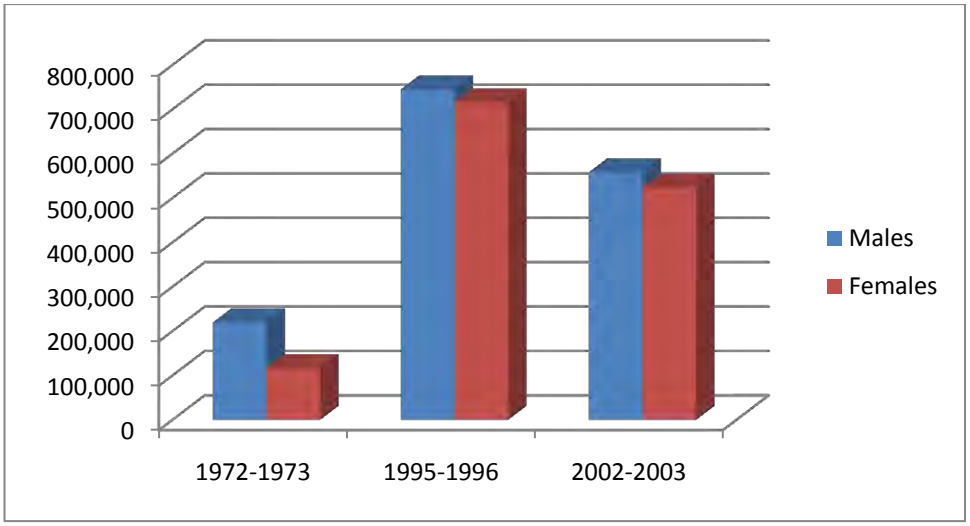
Despite the big investment in education and training programmes in the last three decades, the development of human resources in public administration has achieved limited success. Additionally, the state sector has suffered from over-employment since the beginning of the seventies, when it constituted 54% of the total working force (Ghariany, 2005). Nevertheless, the World Travel and Tourism Council (2004) noted that jobs in the Libyan travel and tourism industry accounted for only 25,649, which was about 2.2% of the total number of people employed in 2004.

5.4.2 Libya's social and cultural environment

According to the 2004 Libyan census, the total population was 5,882,667 with an average growth of 2.4 per cent and about 90 per cent of the population live in urban areas, the majority being in the capital Tripoli and Benghazi, where some people still live in nomadic groups in the south of the country. Libya is a young nation: more than 50 per cent of the population is under 15, and less than 1 per cent of Libyans are more than 65 years of age. The birth rate is estimated at 27 per 1000 and the death rate at 3.5 per 1000. Additionally, the Libyan literacy rate is about 80.8 percent of the total population, with 91.3 percent for males and 69.3 percent for females. (Library of Congress, 2005). With „the social and economic development … Libya has witnessed during the last half of the 20th century, special efforts have been made and stress was put on education including illiteracy adult and technical skills" (Lagga, *et al*., 2004, p.14).

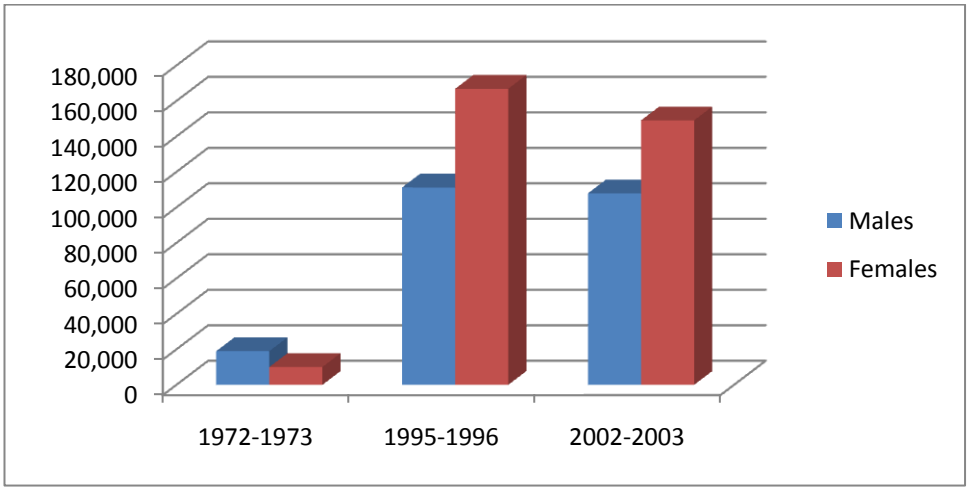
Since early stages of the Al-Fath revaluation in 1969, the government put considerable effort into improving the education system; it believes that investment in human resources will yield more than in business. Figures 5.8, 5.9 and 5.10, show the rapid increase in the number of male and female students at all educational levels. The Figures show the significant growth that took place concerning female enrolment rates and it is noticeable that these rates rose particularly at intermediate and university levels. Lagga *et al*., (2004) consider that this has come about as a result of the social and economic conditions that force males to search for jobs and leave school early.

Figure 5.8: Increase in numbers at the basic educational level



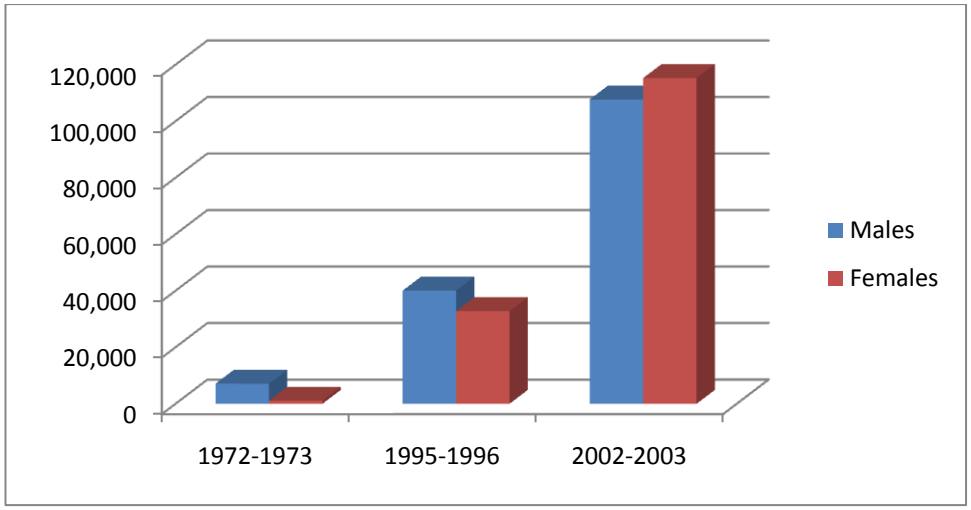
Source: Lagga *et al*., (2004, p.39)

Figure 5.9: Increase in numbers at intermediate (secondary) educational level



Source: Lagga *et al*., (2004, p.39)

Figure 5.10: Increase in numbers at university level



Source: Lagga *et al*., (2004, p.40)

The labour law provides equality opportunities between women and men in Libya, but in practice some social and cultural restrictions prevent women participating in particular activities, such as working in the tourism and hospitality industry. Seif al-Islam (son of the Libyan leader, Moamer Qudaffi) stated in a meeting in London:

> *Women don't face any kind of discrimination in Libya. Women and men are equal*". He added, "*Women are very powerful in Libyan society. They are in the army, they are pilots... women are taking part in every company, any ministry. The problem in Libya is that they waste the resources of the society... the state spends a lot of money to educate women and then they get married and stay at home. ..This is the problem in Libya -- the women*.
>
> (Middle East Online, 2010)

Naama (2007) argues that the structure of Libyan society and culture is governed by Arabic traditions as well as Islamic religion, and these have impacted negatively on female involvement in the hotel sector and tourism activities. Naama (2007) believes that Arabic and Islamic culture consider women‟s physical abilities, with emphasis being placed on the ability to contribute effectively and efficiently in particular jobs,

such as education, medicine and pharmacy, engineering (design), arts and law, rather than other areas, such as the production line and heavy industry.

Working conditions in the tourism and hospitality industry are also associated with long working hours and low salaries, requiring specific skills and night shifts. As a cultural requirement, women should not sleep away from home. Moreover, another critical issue that is not discussed yet in Libya is the harassment in the tourism and hospitality industry. Particular studies conducted in the UK, such as that of Hoel (2002), indicate that 24 per cent of hospitality respondents experienced sexual harassment.

Despite the potential of tourism in Libya, tourism /hospitality remains an unwilling industry. This problem is highlighted by other researchers, such as Al-Balushi (2008), who found that working in hospitality is a stigma for locals in Oman. Lam and Xiao (2004) also assert that while hotel industry is about serving people, in China serving people is considered to be a condition of losing face. Hence, the working conditions in the tourism and hospitality industry present huge challenges. Consequently, the government should take the lead to improve the working conditions in this sensitive industry, where cultural aspects and attitudes need time and an awareness programme to enhance the industry‟s image.

In general there are a number of social and cultural factors that affect the development of tourism, the most important ones being demographic trends, educational levels, religious considerations and local traditions and customs. However, cultural,

environmental and political issues have already been discussed earlier. It should be noted that these environments must be considered in the development of any country.

At the end of this review it can concluded that, despite particular issues where Libya still lags behind and needs to take advantage of its opportunities in order to be a competitive tourism destination, there is „light at the end of the tunnel" when official reports assert that: „Libya is continually working in order to follow up the implementation of the sustainable development goals, and the evaluation of the achievements and the determination of challenges and problems. Finding practical solutions to deal with them" (Lagga, *et al*., 2004).

5.5 Destination accessibility of Libya

After the agreement signed between Libya and the UK on November 2005, it became easier for Libyan and British citizens to obtain visas in order to visit each other's countries (Alfo News, 2005). This step encouraged British tourists and business investors to visit the country. However, Libyan policies are known for their instability and unpredictability and in November 2007 the Libya government decided that all international arrivals must have an Arabic translation page in their passports. As a result of this, a number of tourists were returned to their home countries; this decision was made without any prior announcements or notices and resulted in an initial decrease in international arrivals. The British Ambassador stated: „it is so difficult to get a visa to come to Libya that this is a real turn-off to visitors of all kinds, perhaps tourists and business people in particular" (Abdulmajid, 2005, p.5).

Analysts at the BBC reported that there were certain barriers to entering Libya:

> *Part of the problem for visiting Libya has been a reputation for a difficult visa process- with the necessity of arranging an "invitation" into the country and complications such as having to get your passport translated into Arabic. Tourist visas are generally not available to individuals unless they are part of an organised tour group.*
>
> (Coughlan, 2004, p.2)

Libya has opened it is doors to UN investigators for non-traditional weapons, investors, tourists and job seekers, but entering the country is still hard for foreign investors and tourists, whilst most Arab citizens can visit Libya without a visa and thousands of Africans enter the country illegally without identity papers. Tony Blair pointed out that despite UN sanctions having been lifted from Libya and the country being welcomed back from isolation, there are still many potential problems for overseas tourists and investors (BBC News, 2004d).

5.6 Supporting resources

Tourism is a new industry for Libya; as regards the tourism product life cycle, Libya"s tourism industry falls into an introduction stage, with limited international arrivals, low awareness, weak competition ability and a low quantity and quality of supporting resources, which include accommodation, transportation, infrastructure and communication systems. According to Mr Ammar Eltayef, the Secretary of the General People"s Committee for Tourism:

> *„We are not ready for mass tourism and the Libyan tourism sector is still under construction and we have a lot to do, such as dealing with accommodation and environmental, issues before attracting mass tourism".*
>
> (GBTTI, 2008, p.7)

The World Investment News (WINNE, 2004, p.2) pointed out that the secretary of the GPC for economy and trade claimed that: „*Tourism can offer a lot of potential if the necessary investment in infrastructure is provided*". Libya"s Tourism Minister, Ammar Eltayef, in an interview with the UK-based publicity company World Report, argued that Libya has a huge potential for tourism, but lacks the infrastructure, and promoting Libya"s heritage, the sea, the Sahara, the food, music and folk life is not enough (Dabrowska, 2005). It is well known that the country needs to develop its infrastructure. Evidence for this has come from Steinmetz (2004), who reported that despite the fact that airlines and hotels are full, the Libyan tourism infrastructure has a long way to go before it can compete with its neighbours; he added that this is not because there are insufficient hotels, but the quality does not meet Western standards.

According to the GBTTI statistics in 2006, the total number of hotels increased from 118 in 1993 to 230 in 2006, with a stock of 8,790 rooms in 1993, reaching 13,215 in 2006, and the number of beds rising from 16,254 to 24,234 (GBTTI, 2008). There are three main airports in Libya: Tripoli, Benghazi and Sebha. Until UN sanctions were lifted in 2003, there were no flights into or out of Libya, and British Airways was the first international airline to re-establish a direct link between Tripoli and London. The British Airways chief executive delighted to resume flights to Tripoli, he added Tripoli having huge potential as an important business market and prospects as a tourist destination (George, 1999). Notwithstanding this, the roads system is generally excellent and most road are surfaced and in good condition. However, the signs are in Arabic only, which makes it difficult for tourists to find tourist attractions and historical sites (Millington, 2001). Millington (2001, p.51) reports that:

> *„Whilst the number of tourist arrivals has doubled over the last five years, they are being constrained by a poor accommodation infrastructure and other tourist amenities such as restaurants and transport facilities".*

At present, there is an obvious lack of tourism resources, such as hotels, resorts, airports, amenities, communication systems, entitlements, sporting facilities and so on. Therefore, it is possible to say that Libya at this stage must plan well to develop its infrastructure, taking in to account environmental issues and the protection of the culture. In this context, according to the United States Department of Commerce, Libya has extensive infrastructure development projects in almost every other industry. In November 2007, Libya announced plans to spend approximately, US $ 123 billion on public works over a five year period, and there will be tremendous demand for contracting services and construction materials in the coming years to support major projects, roads, large-scale office complexes, hotels, resorts and residential housing projects (Huot, 2009).

5.7 Comparative advantage

Destinations that have fewer or insignificant tourist attractions have less chance of attracting international tourists, while those that fail to implement an effective promotion programme or have a poor image will also suffer from low numbers of international tourists and are less likely to be visited. The comparative advantages of destinations include their natural resources, heritage, culture and created resources. This section presents Libyan tourist attractions, including the five UNESCO attractions, and views Libyan culture from a tourist perspective. There is also a brief introduction to the

great Libyan man-made river, which is considered to be the longest and biggest project worldwide for transferring water from the desert in western Libya to the north.

5.7.1 Natural resources

Libya has a variety of significant tourist attractions across the country, including stunning landscapes, virgin beaches, green mountains, lakes, desert, complete Roman and Greek cities, old Islamic cities and the remains of prehistoric civilisations; it possesses five UNESCO World Heritage Sites, three of which are Roman and Greek classical ruins (Leptis Magna, Sabratha, and Cyrene).

The Libyan climate varies, from that of the south with the great Sahara to the Mediterranean climate in the north; in the winter the northern coastal area and mountains are considered to have a moderate climate, although there is some snowfall on the mountains and the temperature averages about 5˚C. In summer, Libya is a hot destination, and the temperatures reach a peak in August, averaging about 30˚C. Rain does not usually fall in summer (GBTTI, 2008).

Ghattour (2004) lists the principal tourist attractions as follows:

- Classical archaeological sites including Roman and Greek ruins;
- Desert landscapes and numerous prehistoric sites;
- Mountainous areas, particularly those of the Jebel Akhdar, Jebel Gharbi and the Acacus;
- Historic towns and cities that exhibit a wide architectural and cultural background;

- Beaches and sea;
- Other tourism resources, including opportunities for scuba diving, religious tourism and World War II historical sites.

Libya has two main mountains ranges in the eastern and western parts of the country, with Green Mountain in East Libya and Nafousa (also called the West Mountain); the maximum high altitude of Green and Nafusa mountains is about 1000 metres. Libyan mountains are beautiful with stunning landscapes and a natural environment; they are relatively cold with rainfall in the winter and are green in spring. The temperature in the two mountain regions is slightly colder than the plains in the both the summer and winter seasons (GBTTI, 2008).

The desert represents more than 90% of Libyan territory and has many tourism attraction landmarks. These are of special interest and provide interest and adventure for tourists; they include prehistoric art, lakes, urban constructions in villages and habitations in oases, in addition to the distinct folklore and culture of local people, such as the Tawarg and Tabo. Moreover, the natural beauty distinguishing the Libyan desert attracts many researchers of ancient culture (GBTTI, 2008). Figures 5.11 and 5.12 present some of the Libyan Sahara adventures and heritage excursions. In addition, Libya possesses about 2000 km of coastal beaches along the Mediterranean, which are yet to be exploited for tourism.

Figure 5.11: Adventure of the Libyan Sahara

Source: Chooselibya.com (2005)

Figure 5.12: Libyan lakes in the desert

Source: Chooselibya.com (2005)

5.7.2 Heritage resources

Libya has a varied and valuable heritage left by ancient civilisations that lived in Libya and left their knowledge and culture. Because of limited space, however, this section

concentrates on the five UNESCO World Heritage Sites and highlights the main features of Libyan culture from a tourist perspective.

5.7.2.1 UNESCO World Heritage Sites

The Libyan coast has some of the most beautiful Roman and Greek antiquities and ruins in the world, these being the aforementioned UNESCO World Heritage Sites. These antiquities and ruins are spread in the western and eastern regions. The western historical ruins date back to the Phoenician era, and are represented in the three main cities of Sabratha, Oea and Leptis Magna, while the eastern ruins have evidence of Greek civilisation (GBTTI, 2006).

> *The Phoenicians in the western part of Libya established their commercial centres in the 15th and 14th century BC which later became great cities in the 8th century BC such as (Tripoli), Sabratha, Leptis Magna, Sirt and others. Many significant cites, Phoenician and Greek, were used by Roman as ports for trading slaves, ivory, precious metals, olive oil and animals across the desert.*
>
> (Sugranes and Koop, 2006, p.20)

Leptis Magna is a UN World Heritage Site based on the Mediterranean coast of Libya. The history of the city indicates that the city was originally founded by the Phoenicians in the 10th Century BC. It was then exposed to the invasion of the Spartans and became a Punic city, but later Leptis Magna had its most glorious era when it became part of the new Roman province of Africa around 23 BC (Walda, 2006). Figures 5.13, 5.14 and 5.15 show a section of Leptis Magna. Dr. Hafed Walda, a team leader of archaeologists from Kings College London, who conducted excavations in the Leptis Magna site and knows the history of Leptis Magna well and points out that:

Figure 5.13: Leptis Magna

Source: The author‟s own photograph (2008)

Figure 5.14: Leptis Magna's theatre

Source: The author‟s own photograph (2008)

Figure 5.15: Leptis Magna: Tower of Emperor Septimius Severus

Source: The author‟s own photograph (2008)

Sabratha is the second UN World heritage site (see Figure 5.16). It began life as a Carthaginian trading post because the strategic natural harbour gave it an opportunity to be a centre of trade for many civilisations, including the Phoenicians, Carthaginians, Vandals and Romans.

Figure 5.16: Sabratha Theatre

Source: Carr (2006)

Cyrene is the third UNESCO World Heritage Site, based in the eastern part of Libya. Cyrene is considered one of the most attractive Greek sites as it is marked by unique peculiarities, such as its moderate climate the whole year round. Cyrene has experienced many periods of depression and witnessed a great number of historical events, as shown below in Figure 5.17 (GBTTI, 2007). There are also a number of wonderful historical sites besides Cyrene, such as Apollonia, which was used as the Cyrene port, as well as Ptolemais, Aslonta and Gaser in Libya.

Figure 5.17: Cyrene public square covered with mosaics

Source: Frysinger (2000)

Gadamas is the fourth of the UNESCO World heritage sites and is located in western Libya, about 400 miles south-west of Tripoli. It is known as the "Pearl of the desert" (Bradley, 2009). There is no strong evidence of the date of this oasis town, but archaeologists estimate that the age of the city goes back about 5,000 years. According to Bradley (2009) the Romans occupied the oasis about 19 BC. The oasis town has been an important caravan routes, linking the southern Sahara and north into the lucrative markets of Tripolitania (Bradley, 2009). Gadamas is one of the best preserved cities in

Libya and the houses are made out of mud, lime and palm tree trunks; they are constructed to fit together, with covered alleyways between them and adjacent roofs, thereby allowing passage from one house to another. The city is cold in summer and warm in winter and is famous for its design, irrigation system, narrow street paintings and local folklore (Frysinger, 2000) (see Figure 5.18).

Figure 5.18: Gadamas from the outside and inside the town

Source: The author‟s own photograph (2008)

The first reports of prehistoric carvings were made by Heinrich Bart in 1856, and the rock art of the Acacus is recognised as a part of the world‟s cultural heritage: in 1985 the Acacus Mountains were included in the World Heritage List by UNESCO. Acacus and the Messak Settafet are punctuated by thousands of carved images, which were created using different techniques and on various themes, as shown in Figure 5.19 (Italian-Libyan Archaeological Mission in the Acacus and Messak, 2006).

> *The Libyan Pre-historic remains suggest humans lived in central Libya at least 15,000 years ago. The cave paintings of Jebel Acacus and Wadi*

> *Methkandoush indicate that people and animals flourished and a much lusher vegetation existed in the area from about 8000 to 2000 BC.*
> (Executive Wilderness Programmes EWP, 2005, p.2)

Figure 5.19: Acacus paintings and engravings dating for 7000 B.C

Source: Italian-Libyan Archaeological Mission in the Acacus and Messak (2006)

5.7.3 Cultural resources

This section provides background about Libya‟s culture and considers some culture aspects which are influence upon tourism industry.

> *Libya is culturally similar to its neighbouring Maghreb states. Libyans consider themselves very much a part of a wider Arab community. The Libyan state tends to strengthen this feeling by considering Arabic as the only official language. Libyan Arabs have a heritage in the traditions of the nomadic Bedouin and associate themselves with a particular Bedouin tribe.*
> (Somali Press, 2004, p.2)

Libya is typical of an Islamic country, where Libyan life is organised according to the rules of Islam. Libyan culture is rich and diversified; it includes architectural form and modes, museums, food, music, festivities, local songs of folklore and dances (GBTTI, 2008). For instance, in Libya there are different types of regional, Arabic and

Mediterranean meals, the most famous ones being Bazian, Koskis, Rishda, Shariba, Fathera, Fasoulia. Additionally, certain types of salad, vegeTables and fruits are of good quality, such as watermelon, oranges, tomatoes, peaches, dates, figs and grapes. Libyans also consume more bread than any other nation. Libya is an Islamic society, therefore, beer and wine are not allowed for sale or to drink. Special festivals and events are also organised regularly in many tourist attractions, such as Ghdamas, Ghat and Hun (GBTTI, 2008).

5.7.4 Created resources

As the concept of tourism is still new in Libya, created resources for tourism purposes do not yet exist. However, nearly all Libyans talk about the potential and attractiveness of the tourism industry and even of foreign or local investors. Most of Libya‟s formal guests visit the great man-made river, this being the biggest project conveying natural water from the desert in the south of Libya to the north.

The project is owned by the Great Man-made River Authority (GMRA) and funded by the Libyan Government. According to the GMRA (2008), the Great Man Made River Project extends 4,000 km (the equivalent of 2,485 miles) deep into the desert. The water is transferred through huge pipes, with the measurement of each pipe being about 4 metres in diameter and seven metres in length. The pipes are made of stressed concrete, this network eventually conveying over 6.0 million m3 (5,260 acre-feet) of water every day from well fields deep in the Sahara desert to the main cities the north. In this project, all the material is locally engineered and manufactured (GMRA, 2008). Figure 5.20 gives an overview of the Great Man-made River Project.

To establish what makes the Great Man-made River (GMR) unique and worthwhile visiting, the GMRA (2008) has provided the following facts and Figures:

- 500,000 pre-stressed concrete pipes have been manufactured;
- The length of phase one is 1600 km, and phase two is 2155 km;
- The amount of aggregate used in this project is enough to build 20 pyramids, such as the great pyramid of Khoufu.
- The total weight of the cement used is 7.0 million tonnes;
- The length of the pre-stressing wire is 6.0 million km, which would circle the earth 280 times;
- 1,300 wells produce 6.5 million cubic metres of water per day.

Figure 5.20: The Libyan Great Man-Made River Project

Source: Frysinger (2000, p.3)

5.8 Local communities

The subject of Libyan local communities‟ involvement in tourism development has not yet been addressed in Libya, and makes it difficult to discuss this issue without available literature. Geographically, Libya is divided into three main regions: the west, the east, and the southern regions. However, politically the state has been divided into 33 provinces since 1977 when Qudaffi established a national authority which means the authority, wealth and arms being in the hands of the people, and the people in each province discussing their own affairs, including economic, social and political issues. Theoretically, local communities are involved in decision making processes, and even strategic issues and foreign policy. Practically, however, as with plans for tourism and similar projects, the government does not consider citizen‟s opinions.

5.9 Tourism planning and management

This section reviews and discusses, where relevant, the government‟s role in the development of tourism, which is described as the driver of a sustainable competitive destination model, and there is a brief description of the National Tourism Development Plan (NTDP). The section also highlights the crucial role of the tourist business, including SMEs, Human Resources Development and marketing strategies in developing the Libyan tourism industry.

5.9.1 Libyan political system

The Libyan political system is based on Colonel Qudaffi‟s philosophy; Qudaffi‟s ideas are explained in three chapters of his green book dealing with social, economic and political issues. Hence, authority, wealth and the management of the army were placed

in the hands of the nation. All Libyans participate in local government through the basic People‟s congresses, and each assembly elects a secretary who represents the General People‟s Congress, this being the highest legislative body. Members of the General People‟s Congress appoint secretaries for the People‟s Committee to execute the people‟s decisions in a similar way to ministers in the West (WHO, 2007).

The formal name of Libya is the Socialist People‟s Libyan Arab Jamahiriya; the term of Jamahiriya was invented by Qudaffi himself and has no official translation in any other language. Unofficially, however, the term has been translated as „state of the masses‟ and the people‟s authority or the people‟s power. Qudaffi‟s idea is that the country should be run by the people without government (Nye, 2007).

The General People‟s Congress is constitutionally responsible for formulating policy and laws and the General People‟s Committee is responsible for implementing those policies (Foreign Commonwealth Office (FCO), 2005). The General Board of Tourism and Traditional Industries (GBTTI) is an authority attached to the General People‟s Committee and is responsible for tourism, hospitality and traditional industries.

The General People‟s Committee for tourism with the co-orporation of the UNWTO, prepared a master plan for the country in 1999. This plan was called the National Tourism Development Plan (NTDP).

The NTDP objective is:

> *The NTDP aims to provide the Great Socialist People's Libyan Arab Jamahiriya with a realistic and implemenTable base for the development of the sector through the establishment and promulgation of a policy framework, short and long-term objectives, supporting strategic*

> *guidelines and a five-year action programme from the period 1999 to 2003.*
>
> (NTDP, 1999, p. I)

The NTDP was conducted by an overseas team, whose nine members were Peter Kendell, Robert Cleverdon, Peter Burns, Stephen Crawhurst, John Manning, John Downers, Jim Fletcher, Kevin Millington and Alar Laius. The NTDP consisted of 306 pages, divided into 10 chapters and classified Libyan tourism into six categories, namely: the desert, beaches and sea, classical archaeology, the mountains, historic towns and cities and other tourist resources, such as Scuba diving, health tourism or religious tourism. The plan also highlighted the importance of promoting Libyan culture for tourism and included handicrafts, food and cooking, art and music, festivals/special events and popular singing and dancing. At first glance, it appears to be a good plan and considerable effort has been invested in it. However, when examined in more detail, it can be seen that it does not reflect the reality of tourism industry.

The NTDP lacks critical analysis, and in some sections merely describes existing facilities rather than explaining qualities or processes. When the plan highlights the importance of airports and ports, for example, it just mentions that:

> *There is a very wide network of national airports, three international airports, and nine major and five minor national airports. The facilities available at major international and national airports and some private airports the development of the passenger handling facilities at Libyan ports is closely linked to the state of international aviation in Libya.*
>
> (NTDP, 1999, p.1/41)

The country paid a lot of money for the NTDP, but there are no signs that the country has implemented it. Mr. Eltayef, the secretary of the GBTTI, stated in an interview on 16 January 2006:

> *We are trying to create a master plan for tourism in Libya in which we plan to have 100,000 beds for tourists in the coming years, and we are conscious of the fact that we are highly dependent on the private sector and foreign investment to achieve our goals. We have several laws pertaining to this sector, and we are currently in the process of implementing them.*
>
> (UW, 2006, p.1)

The question is what is happened to the 1999 NTDP. Recently the government allocated a huge budget to establish hotels, resorts and expand Tripoli International Airport as well as other facilities. The question is whether these projects are planned or just individual decisions; the outcome of this will be seen in Chapter Eight. Libya planned to establish and build a large number of new hotels in major cities to satisfy the increasing needs of tourists arriving from all over from the world. The Tourism and Exhibition Department, in its second five-year plan, is carrying out various projects, such as constructing hotels, resorts, tourist villages and setting up new beaches (Annawassi, 2004). „*None of the SMEs owner-managers interviewed could understand why the government had spent so much money on a plan it was ignoring. There were strong feelings that the NTDP was not delivering its objectives*" (Jwaili, *et al*., 2005, p.18).

5.9.2 Tourism businesses including SMEs

SMEs are regarded as the engine of most economies, both in the UK and Libya. SMEs represent about 99% of economic activity, and more than 85% of the enterprises are restaurants and cafes (Jwaili *et al*., 2005). SMEs enable people to be free of public sector domination and its associated negative economic impacts, with a lack of productivity rewards, low productivity, high costs etc (Matug, 2007).

SMEs in Libya face numerous challenges, even though the state has announced a move towards the free market and privatisation after decades of domination from the public sector. Abuzed (2000), cited in Jwaili *et al*., (2005, p.317) listed a number of problems affecting Libyan SMEs, as illustrated in Table 5.4.

Table 5.4: Problems affecting Libyan SMEs

- *A lack of coordination between LGBT/GPCT and tourism companies about tourism marketing and the organisation of tourism shows and festivals both inside and outside the country.*
- *The capacity of the transport system is insufficient to cope with the increasing demand in all the various types of tourism activities offered by the industry, e.g. desert tourism.*
- *Accommodation outlets do not meet international standards and prices are higher in relation to the services provided. This is a disadvantage in international markets, especially when compared to other regional competitors.*
- *A lack of foreign language capability in places of interest to tourists and in ports across the country.*
- *The cleanliness of all cities, towns, roads and places of interest is not high on the agenda.*
- *There is a lack of facilities in almost all places of interest to tourists.*
- *There is a lack of preparation and training of all personnel in the tourism guidance sector.*
- *There is a lack of coordination to develop a competitive pricing policy.*
- *Visa procedures for tourists are still complicated.*
- *There is a lack of regulation to encourage local investors.*
- *The LGBT/GPC have delayed the establishment of regional tourism offices.*
- *There is no comprehensive regulation for the tourism industry that allows Libyan tourism to benefit from development in the international tourism market or from international tourism research.*

SMEs are demanding better financial support from the government as well as an update of the legislation frameworks, a unifying licensing system and the implementation of an effective tourism master plan. In addition, they are also asking the government to establish an institution which can link SMEs with the government (Jwaili *et al*., 2005). In Libya‟s case, SMEs rely on the government to do everything. However, the government also wants the private sector to take responsibility and to play a positive role in tourism development.

The General People‟s Committee of Manpower and Training established a project to sponsor businesses and technical innovations in 2006. The project was aimed at supporting people with economic ideas from the job market or those already working in SMEs. Such support takes many forms, such licensing and the provision of legal advice, preparing project visibilities, providing training programmes and financial support (Nakoh, 2007).

5.9.3 Human Resources Development

According to the UN Human Development Report (2009) which measures the quality of life, the human development index for Libyan Arab Jamahiriya is 0.818, which gives the country a rank of 56th out of 177 countries, as shown in Table 5.5.

Table 5.5: Libyan Arab Jamahiriya's human development index 2005

HDI value	Life expectancy at birth (years)	Adult literacy rate (% ages 15 and older)	Combined primary, secondary and tertiary gross enrolment ratio (%)	GDP per capita (US$)
1. Iceland (0.968)	1. Japan (82.3)	1. Georgia (100.0)	1. Australia (113.0)	1. Luxembourg (60,228)
55. Tonga (0.819)	59. Tunisia (73.5)	78. Mauritius (84.3)	16. Slovenia (94.3)	59. Mexico (10,751)
56. Libya (0.818)	**60. Libya (73.4)**	**79. Libya (84.2)**	**17. Libya (94.1)**	**60. Libya (10,335)**
58. Oman (0.814)	62. Saint Lucia (73.1)	81. Saudi Arabia (82.9)	19. United States (93.3)	62. Uruguay (9,962)
177. Sierra Leone (0.336)	177. Zambia (40.5)	139. Burkina Faso (23.6)	172. Niger (22.7)	174. Malawi (667)

Source: UN Human Development report (2009)

Human resource development is one of the most important issues in Libya in general and the tourism industry in particular. Unemployment and workforce quality, women"s work and disability issues have priority on the government"s agenda (GPC for manpower and training report 2007).

Libya"s total labour force is estimated at 1.6 million and some sources estimate the unemployment rate at around 30%, this primarily affecting the young (Library of Congress, 2005). According to the Arab Work Organisation, Libya is listed as the county with the fifth highest unemployment rate; statistics indicate the unemployment rate in Libya was 17% in 2003, with 383,546 people looking for work (Al-Falah, 2007). Al-Falah (2007) indicates that there are a number of reasons behind the high unemployment in Libya. These include:

- The fact that some Libyans are not willing to do physical work, such as cleaning, agricultural work, cooking, constructions and out door works, etc;
- A vacuum in the legislation to organise contact between training institutions and the labour market;

- A lack of support to establish SMEs which do not require qualifications and experience;
- A political atmosphere which does not encourage foreign investors;
- A limit in the number of economic development projects;
- Easy access to foreign workers who accept any type of work with low wages.

Naama (2007) conducted research on the Libyan Work Force Plan (WFP), and his study revealed the limited knowledge and implementation of the concept of WFP in the Libyan hospitality sector. In this context, some of the comments of Naama"s interviewees are documented to reflect the absence of HRD plans in the Libyan tourist and hospitality industry. When Naama (2007) asked a member of the GBTTI about the type of Workforce Planning, they had implemented, the interviewee stated: „*I am unaware of workforce planning…until now, we have not put in place any workforce plan…not even for our hotel sector*".

The majority of stakeholders in the Libyan hotel sector, including hospitality institutions, have little or no knowledge of WFP and there is an urgent need to develop a workforce plan for the tourism and hospitality sector; the quality of the workforce in the Libyan hotel sector is crucial to achieve service excellence, where the skilled workforce is limited, and the sector cannot produce excellent service quality (Naama, 2007). This analysis is supported by Tobin and Nourse (2009), who organise archaeology and culture trips. They informed their groups that Libya had been almost 20 years without tourists and the tourism infrastructure is new and immature. In addition to this, tour guides may not be as knowledgeable or well-educated as they would like, and hotels are

not maintained to American standards. Naama (2007) concluded that in the case of Libya, the industry suffered from a lack of sufficiently and appropriately qualified academic staff and there was no effective link between education institutions and the hotel industry. Libya is an Islamic society, but there is an increasing number of women in work. According to Al-Hwaat (1999):

> *Theoretically, there are no obstacles facing women if they wish to go out and work. The Libyan legislation permits, if not gives women the right of holding public posts in the state, and performing all economic and social activities, but practically, there are some hardships represented in certain deeply-rooted customs and traditions.*
>
> (Al-Hwaat, 1999, p. 4-15)

Al-Hwaat (1999) concluded his article by stating that the work of women in Libyan Arab Society continues to face difficulties, these arising either from the traditional social culture regarding a woman‟s status and her role in society, or problems imposed by the nature of modern industrial society.

> *According to a senior Libyan official, the government plans to spend "billions" of dollars on training citizens in the English language and the use of computers, among other basic business skills. Saif and his advisers think training is the quickest way to get a return on the government investment. Later, they hope to revamp the education system, which does not presently give graduates the right skills to cope with the 21st century economy.*
>
> (Reed, 2007a, p.1)

Abu-Helil, a Jordanian tourism representative, has succeeded in boosting Human Resources training in Accessible Tourism throughout the Arab region. He also raised an important issue, arguing that people with special needs are invisible in the Arab World; he invited Arab tourism industries and authorities to take a remarkable step and make this segment visible, as many tourists, customers and employees who have special needs also have talent and the employees can be employed within the industry (Abu-Helil, 2009).

5.9.4 Environment issues

Most of the country is desert, and most of the population lives on the fertile land along the Mediterranean coast; there are no rivers in Libya and rain is scarce. As regards the environment in Libya, gases and oil refining cause atmospheric pollution, and, as a result, desertification and erosion are growing (General Board of Global Ministries, 2004). Libya is looking for alternative energy resources; its goal is to satisfy up to 6% of the country‟s energy needs from renewable resources (General Electric Company report, 2006).

The development of tourism is often associated with environmental damage and it requires a huge amount of land and resources, for example, long stretches of coastline have been turned into concrete. However, most MENA countries have limited resources of water and tourism makes the situation worse as tourist zones consume about 8 to 10 times as much per day compared with other residential areas (Hazbun, 2001). The first workshop on sustainable tourism in Libya was held in Al-Bayda between 28 and 29 November 2006. Here, the participants argued for the necessity of taking urgent steps to implement an effective, sustainable tourism strategy and action plan (Green Travel Network, 2007).

5.9.5 Marketing strategies

With the NTDP (1999) in the short-term, the development and promotion of tourism for the international market should focus on the Ancient Greek and Roman heritage and the desert, where Libya has a competitive advantage. NTDP (1999, pp.7 &15) suggests three strategic marketing and promotion aims for Libya, namely:

1- The creation in the major tourist generating markets of the perception of the Jamahiriya as a destination;

2- Offering a diverse range of natural and cultural resources that will appeal to, and attract a range of tourist types and market segments;

3- Providing a setting for tourist activities that is welcoming, relaxing and free of any threat to personal safety.

In short, the Jamahiriya should be a bona fide destination with a range of holiday types requiring:

1- The differentiation of the country in terms of its tourist attractions, facilities and services from its neighbours, Egypt and Tunisia in particular;

2- A demonstration of the country‟s commitment to the improvement and expansion of its tourism infrastructure and facilities through a development policy based on quality and sustainability.

The NTDP (1999) pointed out that in order to achieve these aims, a programme of marketing activities is required, this being designed to create and sustain the image of the Jamahiriya as a high quality tourist destination. It should be pointed out here that NTDP (1999) is a guidance report providing theoretical ideas and is not a practical programme for adoption. The problem for developing countries is the planning and how to implement the plans, these demanding clear objectives, a fixed amount of time, resources, budgets, and people.

The US Commercial Services (2008) warned that entering any foreign market can be problematic. Even though Libya is an attractive market, particularly for investors in oil,

gas and tourism industries. The Libyan government has made very little effort to promote its tourism products abroad (WINNE, 2004). According to Jwaili *et al*., (2005), who explored the weak role of the Libyan government in promoting the country aboard, it is also missing the coordination between the public and private sector. They reported:

> *There was a strong feeling that more attention should be paid to international fairs and markets to promote Libya's rich heritage and that there should be better coordination between the public and private sectors in promoting the country in international events.*
>
> (Jwaili, 2005, p.319)

According the secretary of the GBTTI, Libya is not targeting mass tourism like its neighbouring countries. He asserts that Libya is focusing instead on educational and cultural tourists and argues that they are not aiming to sell the country cheap (United Word, 2006).

5.9.6 Service quality

In the view of Jones and Haven-Tang (2005), service quality has been the main concern of researchers for decades, and service quality is considered key to gain competitive advantages for tourist destinations. The previous discussion indicated that current tourism services have a long way to go to meet international standards, such as making the procedure easier to obtain a visa, and providing hotel services and public amenities. A critical analysis of service quality is provided in chapter eight.

5.10 Summary

Since 2003, Libya has made a new start in its relations with Western countries, after about 10 years of international isolation. Libya stands on oil lakes, and although its

economy depends upon the oil industry, tourism is seen as a potential industry. However, Millington (2001) asserts that even with the improvement of its image, Libya still faces other problems as regards the development of tourism. The Euromonitor International 2009 report summarised the Libyan tourism situation as follows:

> *With its rich heritage, well-preserved archaeological sites and a beautiful and long coastline, Libya has so far failed to establish its tourism industry in the same way as its neighbours, Egypt and Tunisia. Libya has similar attractions to these countries and yet its oil revenues have allowed Libya to have no need for economic diversification.*
>
> (Euromonitor International , 2009, p.1)

Chapter five provided extensive information about Libya as a tourism destination, starting with a brief introduction and a description of its background and highlighting tourism factors as presented in the model of a sustainable competitive destination. This included the destination image and accessibility, and then analysed the comparative advantage, supporting resources, local communities, destination management and service quality. It also considered the impact of external environments upon the tourism industry. The conclusion can therefore be made that:

> *Libya has a chance today to create an image for itself in its own linking; oil wealth of magnitude proportions for locals and foreigners alike, a cultural destination rich in history and traditions and a business hub that would be the envy of its neighbours along both sides of the Mediterranean, with Tripoli at its heart.*
>
> (Milky and Perret, 2008, p.8)

Chapter six will identifies Libya‟s image in the UK market with a comparison with its competitors in the MENA region namely Jordan, Egypt, Tunisia and Morocco. Whilst destination image is formulated by many source of information such as the media, word of mouth, tour operators and destination positioning and brand, chapter six discusses all these aspects, and the Libya‟s image in the UK is captured by the perceptions of British potential tourists and actual British tourists who already visited Libya.

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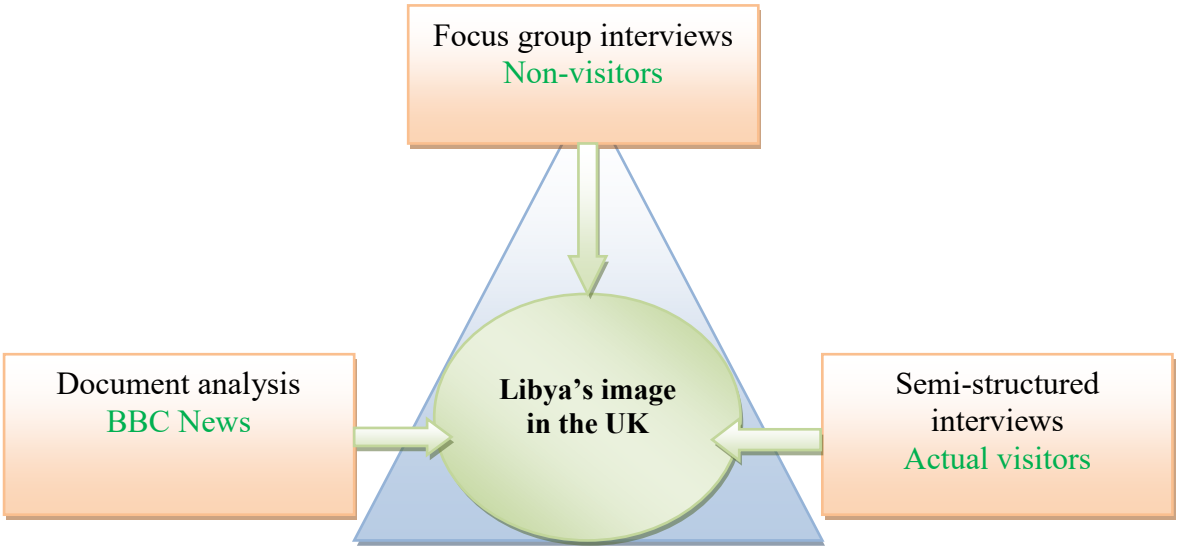
Chapter 6: Libya's image in the UK

6.1 Introduction

This chapter analyses the demand side of Libya's sustainable competitive destination and focuses on the UK as a potential target market for Libya. The chapter identifies Libya's image in the UK market compared with its competitors in MENA. This image is influenced by many factors, such as the media (including the Internet), the activities of tour operators, 'word-of-mouth' communication and destination positioning and branding. The impact of all these factors is addressed in relation to Libya's image in the UK. This is captured by potential British tourists' perceptions (non-visitors), the British media (focusing mainly on the BBC News from 2002 to 2009), and the projected image which were developed by British tour operators and how Libyans think about their country's image abroad, as presented in Figure 6.1.

Figure 6.1: Libya's image in the UK



6.2 Background

The image of any tourism destination is very important, according to Baloglu and McCleary (1999b), and the initial image formation stage before visiting a place is a crucial phase in a tourist's destination selection process. However, Baloglu and McCleary (1999b) further highlight that tourism destinations often compete on nothing more than the image held in the potential tourist's mind. Hence, investigating the Libyan image in the UK market has become a critical issue to increase the number of British tourists. As discussed in Chapter Five, the UK is one of the fastest growing tourist markets and thus of particular interests.

Baloglu and McCleary (1999b) add that image is mainly brought about by two major forces, namely personal and stimulus factors: personal factors are related to the characteristics of a person, such as culture, education, age and motivation; stimulus factors are linked to the image itself, such as the source of the information type and the channel distributor. Hence, this chapter aims not merely to explore Libya's image according to the perceptions of British non-visitors, but also to consider the role of the media, and UK tour operators and the role of word-of-mouth in image formation.

As discussed earlier in Chapter Five, Libya has made a fresh start with the West and built a new relationship. Since the lifting of UN sanctions in 2003, most Western leaders, including those of the UK, France, Spain and Germany have visited Qudaffi in his tent in Libya's desert. By adopting this strategy, Libya has avoided direct conflict with the USA and its allies, including the UK. This can be considered a political success, but an important question has arisen which this chapter will endeavour to

answer, namely, whether or not Libya has had success in enhancing its image abroad and promote itself as a tourism destination.

6.3 Destination image attributes

Practically, people's needs and desires are variable and changeable over time; the requirements of tourists in 1970 were not the same as those of tourists in 2009. Consequently, it was deemed necessary for this study to identify and update the actual British image attributes from the point of view of British tourists themselves to ascertain what they want to find in a tourism destination. A focus group interview was therefore conducted with British tourists this identified 23 salient image attributes, which were then applied to this research investigation.

A second focus group then aimed to identify salient tourism destination image attributes from the potential tourists themselves in the UK market. By using a moderator guide, the members of the focus group made it possible to identify 23 salient tourism destination image attributes; the discussion revealed that salient destination image attributes vary from one destination to another and depend on the purpose of the visit (leisure, business, visiting relatives, friends, religion and others). Moreover, the salient destination image attributes differ according to whether winter holidays or summer holidays are being discussed. The group emphasised that holidays are not just relaxing occasions, but tourists also enjoy undertaking particular activities, such as sightseeing in cities, visiting museums or buildings like towers, and shopping. The study also revealed that favourite tourism destinations are those which have a mixed choice of tourism attractions for British tourists.

In addition to this, the second focus group members expressed their feelings and perceptions about the salient destinations image attributes through their experience. For instance, the group could not imagine the role of destination accessibility, because they had never faced difficulties in relation to getting a visa or experiencing barriers to destination entry.

In the next stage of the focus group interview, the moderator asked the participants to sort such attributes into the most and least important categories. The differences among the participants were clear to see: some saw beaches as being more important than other attributes, while others considered the cultural sites to be more important. However, after a considerable amount of discussion, the group members decided on a list of salient destination image attributes, as follows:

The selected salient British tourism destinations image attributes were:

1- **Friendliness:** the group agreed that if they were not welcome in a particular destination they were not happy and would avoid visiting that destination; they liked people with smiling, friendly faces.

2- **Personal safety:** not surprisingly, the group believed that personal safety was an important image attribute as regards tourism destinations. One of the members of the focus group expressed her feelings about a visit to Tunisia in 1996 when local people intimidated her, forcing her to buy from them and she felt very frightened. This was in contrast to another member of the group, who pointed out that on a recent visit to Morocco, he never once felt frightened, considered himself to be in a safe destination

and found the local people very friendly. In general, the group shared the same feelings towards safety and personal security.

3- **Climate:** climate is a very important factor for tourism destination, but an ideal climate depends upon the purpose of the visit. For example, with an ideal climate for relaxing on the beach, the group preferred hot and sunny weather. For skiing, however, clearly the weather is expected to be cold and snowy in the mountains, although it can still be sunny as well. For other activities, such as exploring, the ideal climate whould be mild and warm. Climate is therefore an important factor as regards destination image attributes, with the preferred climate depending upon the purpose of visit.

4- **Ambience:** usually people go on holiday to escape the daily routine and work stress. Hence, tourists are often looking for peace and tranquillity; many tourists are escaping from the stress of work and noise. Therefore, holidays for many people are about relaxing and recreation.

5- **Information availability:** the participants emphasised the need for adequate and accurate information regarding their tourism destinations; this applies both before and during the visit, and tourist destinations should provide tourists with the necessary information (tourism attractions, museums, hotels, restaurants, shopping centres, and parking locations; there should also be maps and road directions.

6- **Expanding knowledge and gaining experience:** visiting particular destinations can be costly, although tourists come away from them with cherished memories and enriching

experiences. The group members also revealed that one of the main objectives of visiting a destination is to gain knowledge and experience, not just to tell others about, but also to make use of in practical life.

7- **Adventure opportunities:** the group noted that adventure opportunities can constitute a variety of activities, such as rock climbing, going on safari, scuba diving, camping, and so on. Adventure opportunities are one of the main tourism destination characteristics and depend upon the interests of the tourists.

8- **Cultural festivals and events:** the group was interested in local festivals and events as well as experiencing the local life. These festivals and events were preferred because they do not exclusively target tourists, which would be boring and deny them the opportunity to mix with local people. Therefore, understanding the local folklore and heritage adds a unique flavour to the visit.

9- **Cultural attractions:** cultural attractions including historical sites, ruins, monuments and archaeology were considered by the group to be important attributes in tourism destinations; the majority of the group was interested in old buildings and cultural attractions.

10- **Landscape:** Natural scenery makes tourists feel free, fresh, open-minded and optimistic. A member of one of the groups declared '*landscape is quite important for me, I like to see different landscapes*'.

11- **Beaches:** Some of the group considered beaches to be very important, while others thought them less interesting. In addition, it was made clear that beaches must be safe, clean and have adequate restaurants and public utilities.

12- **Environment (unpolluted):** one member mentioned '*I couldn't imagine being in a destination with rubbish everywhere*'. Whilst the group have no idea abut the environment conditions in Libya, with its huge desert they expect it is clean and unspoiled country.

13- **Language Barriers:** '*It is nice to be understood, at least at a basic level, in order to communicate with local people*'. The group discussed language barriers and communicating with the local people and all the members considered that tourists and local people should have a common language in order to understand each other. But if local people do speak English, in fact this will prevent them to visit the destination.

14- **Access to cash:** this point was not made by the participants, but was raised by the moderator, because, from past experience he knew that some destinations, including his home country of Libya, do not have cash machines or use credit cards. This made an impression on the group and was a situation they had never faced in their previous holidays. A member of the group stated that '*it would be a nightmare if I urgently needed urgent cash and couldn't get it*'.

15- **Transportation:** the group agreed that during a visit to a tourist destination, they would want to travel and visit many places and tourist attractions. Therefore, transport should be comfortable, safe, and available when needed.

16- **Local infrastructure:** includes local roads, signs, restaurants, public toilets, electricity, water sources, and telephone services and so on. The group indicated that developed destinations have a better chance of being visited than undeveloped ones.

17- **Accommodation:** the group did not precisely agree about accommodation quality; some showed that the quality of the destination accommodation is important, while others were happy with clean, hygienic and cheap accommodation.

18- **Food and drink quality:** there is no doubt that food is one of the destination characteristics; some destinations are recognised for their food, such as Italy, while others suffer from poor food quality where even imported food, like fast food chains, are not available. Despite the lack of importance regarding food quality in the group's priorities, destinations should improve and develop their food quality, or at least the food should be appealing for the tourist destination.

As regards alcoholic drink, one member of the group stated that tourists should respect the local culture and traditions, this being a tourist's responsibility. One member declared: '*I still go to destinations that don't allow alcoholic drinks*', while another added that: '*alcohol may influence my choice for long-haul holiday, but for a short break, it would be fine*'. Hence, the group considered that destinations which offer

alcoholic drinks are more favoured by British tourists, but they do not mind visiting destinations that don't allow alcohol for short breaks.

19- **Shopping facilities:** as the group mentioned earlier, a visit to a tourist destination constitutes a mixture of activities, including visiting shopping centres and public markets. Tourists are interested in seeing things produced locally, and usually buy souvenirs.

20- **Standardisation for families:** this includes food, accommodation, entertainment, swimming pool access and beaches catering for the needs of families (especially those with young children). One participant said: '*I like the Canaries area because it is nice, has clean beaches, good hotels, good food and we can enjoy it as a family*'.

21- **Accessibility:** destination accessibility is a vital factor, especially for short breaks when time is limited. In spite of the group never having faced difficulties obtaining a visa or experiencing difficult entry procedures, they felt it was necessary to have easy access to a destination. In general, British people are not fazed by having to wait in a queue, in contrast to Libyans, who are impatient enough and only queue if forced to do so.

22- **Currency value:** one group member stated '*I can find cheap hotels and flights'*; the development of the global economy and cheap flights has made most destinations available to tourists. Secondly, it was pointed out that tourists prefer package holidays, which include everything and are paid for in advance. Thirdly, tourists tend to spend a short time on holiday. Currency value is of less importance for British tourists.

23- **Sporting facilities:** a group member revealed '*I doing some sporting activities during my visit, such as biking*'. Another member in the pilot study focus group interview claimed that she needed gym facilities. The others, however, did not show much interest in pursuing sporting activities during the trip. Hence, it can be concluded that sporting facilities are not necessary for all types of tourists, this being relevant for a specific segment of tourists.

These image attributes have therefore been used to establish Libya's image in the UK, and to compare the country's image with those of its competitors in the MENA region, namely, Jordan, Egypt, Tunisia and Morocco.

6.4 Libya's image in the British media

International media play a crucial role in influencing the potential tourist's image. Chapter Five set out the relationship between Libya and the West, including the UK, this being mostly associated with political conflict. As a result, people in Western countries who see Libya as an enemy. In addition, for more than three decades the international media engaged in covering political issues, and there have been no real efforts to present Libya as a tourism destination.

The most frequently used words in association with Libya in the international media were 'Qudaffi', 'accusations', 'bombing', 'terrorism' and 'compensation' as discussed in Chapter Five. The most important issue is not whether Libya was guilty or not or just paid the compensation to buy peace, as noted by Dr Ghanim, the secretary of the GPC

(BBC News, 2004e). Rather, the issue is that for more than 30 years Libya was in a cold war and witnessed bloody conflict with the West in other periods. It then spent more than a decade in international isolation until 1999, when Libya changed its foreign strategies and policy, which resulted in 2003 with the lifting of UN sanctions. Hence the issue is whether Libya fixed its broken image or still has an image problem to promote itself as tourism destination, Chapter Eight will discusses this issue and will answer this question.

6.5 Libya's projected image through UK tour operators

International tour operators are powerful intermediaries in the tourism industry, while the media in the UK is responsible for drawing a negative image of Libya. It therefore remains to be seen what UK tour operators do in promoting Libya. Klemm and Parkinson (2001) argue that large tour operators play an important role in promoting destinations and attracting tourists from international markets. Developing the tourism sector requires the integrated effort of all tourism stakeholders. However, the tour operators' market is still competitive, because of the growth of small and medium-sized tour operators, and the low barriers for new entrants (Taylor, 1996).

> *However, for destinations trying to reach the UK consumer the concentration of the UK travel trade makes it more difficult. This is because the major tour operators focus on large regions and resorts and because of vertical integration they are able to restrict the choice of brochures in the high street travel agents to their own product.*
>
> (Klemm and Parkinson, 2001, p.368)

Despite the healthy conditions of the tour operators' market in the UK, it seems that the main tour operators offer packages for mass tourism and avoid risky destinations. On the other hand, some useful statistics are worthwhile mentioning here. According to the

Worldwide Business Information and Market Report(2003) and MBD (2008), about 62% of UK residents take at least one overseas holiday per year, and around 25% of them spend about £500 per person per trip; expenditure on holidays abroad therefore increased by 24% in 2007 compared to 2002. Moreover, the expenditure on all types of holidays aboard is estimated to increase by between 1 and 3 % in the next five years and to increase by 12 % between 2007 and 2012. In addition, the Caribbean, South America and Australia were the favourite destinations for British tourists. Many people in the UK see an annual holiday as a necessity rather than a luxury and there is a trend towards short breaks and low cost flights. Despite the importance of the UK market, there is presently no mainstream tourism between Libya and the UK.

The top five tour operators in the UK are Thomson (with 27% of the market) Airtours (with 18%), First Choice (with15%), Thomas Cook (14%) and Carlson (1.5%) (Klemm and Parkinson, 2001). The main tour operators in the UK do not offer any packages to Libya. It is therefore necessary to establish why UK tour operators have not yet entered Libya's tourism market, and why they do not offer packages to Libya. This question has been put to Libyan tour operators who are supposed to be connected to UK tour operators, and it has been established that they believe '*the British tour operators have more fears and suspicions about entering the Libyan market; they are still conservative, in contrast to Italy, Germany and France*' (TourOp6). As TourOp3 pointed out, there are '*no maps, brochures or even CDs about the tourism in the country*'.

> *Large tour operators need large hotels, resort tour operators and travel agencies to deal with them and establish partnerships, and all the Libyan tourism organisations are small and medium sized.*
>
> (TourOp1)

> *British tour operators do not enter any market without market research (which is not available in Libya) and require that everything should be organised and on time.*
>
> (TourOp6)

It can be argued that UK tour operators and travel agencies consider the Libyan market to be associated with high risk, and it lacks the flexibility to cope with Libyan market conditions, unlike Italian and German tour operators. However, most UK tour operators offer packages to Jordan, Egypt, Tunisia and Morocco, countries which have provide the requisite facilities to meet market demand.

6.6 Libya's image in the UK from a Libyan perspective

Most Libyan managers will not criticise the government's performance, for instance, as regards Libyan tourism stakeholders. Many government officials are not aware that the Libyan image abroad is problematic, or if they do know this, they cannot express this openly. When the researcher asked the manager in the GBTTI what he thought about the Libyan image in the UK being negative, he replied somewhat unclearly:

> *On contrary, we did participate in Barcelona's tourism fair, and the flow was extremely high on the Libyan wing. We also participated in Madrid and Milan's tourism fair and we had almost 4000 Kg of brochures that were distributed in minutes.*
>
> (GBT1)

The answer did not satisfy the researcher, and therefore the same question was put from a different angle. The question referred to whether people outside the country still had a negative image of Libya. The answer to this was: '*No, that was in the past, the image is changed through our existence in the European market*' (GBT1). He added that: '*the Western media has started to promote a good image of Libya and we collaborate with some foreign TV channels and magazines; our image is 100 per cent positive*' (GBT1);

after a critical discussion, eventually, he did acknowledge that the country has had a negative image, but that outstanding efforts had been made to change that image.

The Libyan Tourism Minister, however, is not aware that his country continues to have an image problem (Thomson, 2004). A Libyan tour operator manager argues it is Libya's responsibility to change that image and the authorities responsible for tourism will have to spend millions for changing the image of Libya through the media. Another tour operator manager added: '*I think that British people still have the old background about Libya, especially the political issues*' (TourOp2).

According to (TourOp 1, 2, 3, 4, 5, 6, and 7) Westerners, particularly in the UK, are unaware of Libya and what is going on there. In addition, and as mentioned before, Libyan managers are not aware that Libya is suffering from an image problem in the West, particularly in the UK.

> *In the UK there are not enough promotions and not enough effort is spent in advertising, which should be the main duty of the tourism ministry. The British have no idea about Libya, and they consider that everything that happens in other Arab countries also applies to Libya as well.*
>
> (TourOp4)

> *Recently many authors have written good articles about Libya in newspapers, magazines and the internet regarding the positive aspects and advantages of Libya. However, there is still an absence of awareness about Libya in some peoples' minds in the West. And the Libyan image is not clear and is misunderstood in Europe, for instance, while Tunisia has seven tourist information offices in the UK.*
>
> (TourOp6)

The secretary of the GBTTI expressed the feeling that the Libyan image in Western countries is a false one, and one of his managers holds that this is an outdated

interpretation of the country. However, tour operators, who have direct contact with tourists, see the government and tourism authorities as being distant from the needs of the tourism industry.

6.7 Libya in the British non-visitor's eyes

Two focus group interviews (numbers 3 and 4) were employed to explore the Libyan image in the UK market in comparison to its competitors Jordan, Egypt, Tunisia and Morocco. Focus group 3 was conducted in Cardiff, while number 4 was conducted in Scotland. The initial findings of this study revealed that there are no differences between the two groups in relation to their perceptions of Libya.

This section is divided into seven sub-categories: 1- general information; 2- destination image; 3- supporting resources, including accommodation, infrastructure, and transportation; 4- comparative advantages, which include heritage, historical sites, culture and created resources; 5- local communities; 6- destination planning and management; 7- service quality.

6.7.1 General information

The study revealed some interesting findings. Firstly, the knowledge of British people concerning the MENA region varied from one person to another; this was established by distributing an amusing quiz to the two focus groups (see appendix D). The quiz was intended to get the discussion going and to understand the groups' knowledge of the MENA region in general and Libya in particular. The study also revealed that both groups had absolutely no information about Libyan tourism attractions. Further, the

study indicated that potential British tourists would spend an average of 10 days to 2 weeks on holiday per year, visiting more than one destination.

Notwithstanding this, both groups highlighted that their information about Egypt was better than the other countries in the region, because they had already learned about Egypt at school. However, none of the group members had seen an advertising brochure or programme about Libya, and the only piece of information they had about Libya was that Qudaffi controlled the country. They did not, however, recognise if he was the king, president, prime minister or leader or even how long he had been in power; the group explained that Qudaffi's image was one of opposition to the West and its policies.

A number of the group members had been to Tunisia and Egypt, but none of them had ever thought about visiting Libya. Focus group 3 asserted that they had never heard that Libya was a tourism destination, and so had no reason to go to there: '*I never thought of Libya as a tourism destination*' (FG3C4). A member of group 3 added: '*I do not think there is a tourism package industry available in Libya*' (FG3C1). It can be argued that there is an absence of marketing and promotion of the country outside of Libya, which has led to a total lack of awareness of Libya's tourism products in the UK.

6.7.2 Destination image

Qudaffi's image and name is the only thing that most British people know about Libya. The group did expect Libya to be a hot destination, and could not identify any differences between the cultures of Egypt, Libya, Tunisia and Morocco. They also

argued that the situation was similar to British culture, where they could not recognise any major differences between the English, Welsh, Scottish and Irish.

The moderator asked the group a question which had been developed by Echtner and Ritchie (1991), namely what images or characteristics came to mind when Libya was considered as a tourism destination. A member of focus group 3 claimed: 'The character, I think, is Colonel Qudaffi' (FG3C2) and all the others concurred. Then the moderator asked them what else they knew, to which they replied they knew nothing else. FG3C3 expressed her perceptions about Libyan characteristics or images as '*I would think of desert…..and I would not think of coastline….. I would not think of beaches…just desert and some cultural locations to look at*'. The rest of the group emphasised that Qudaffi is the only known Libyan feature and they did not think Libya had beaches.

The discussion turned to the topic of Libyan heritage and historical sites; none of the group members in either focus group had any idea of Libyan heritage. With this being the case, the researcher asked them to describe the atmosphere or mood that they would expect to experience while visiting Libya? A member of group 3 (FG3C3) stated '*I would imagine, it would probably be somewhere like Tunisia but less touristy*'. She added that she had been to Tunisia and Morocco which were quieter than other destinations. Another member (FG3C1) declared: '*I have no image of the atmosphere in Libya… and I do not think that Libya has a very strong image*'.

Group 3, in considering the perceptions they had from the media or other sources about particular destinations, remarked that these did not always reflect the reality of the actual visit, and FG3C2 mentioned:

> *When we go travelling, we often find that the location is really absolutely nothing like what we read about. So I assume that the Libyan atmosphere is very similar to many places hospitality-wise, and I imagine it is dry, hot, and probably has lots of markets.*

6.7.3 Supporting resources

Supporting resources, including the accommodation infrastructure and transportation, are important factors for tourism success. Destinations with good supporting resources have the opportunity to attract more tourists as well as to gain high customer satisfaction and loyalty. Britons who have not visited Libya might expect it to have good quality accommodation, particularly in the main cities. A member of group 4 pointed out that she had read an article about Muammer Qudaffi concerning his emphasis on the benefits of the tourism industry as an alternative resource to oil. Therefore she imagined that enough time had elapsed for Libya to establish high quality hotels. Group 4 also indicated that they thought there were around 15 to 20 five-star hotels in Libya; these were clean and of good quality, but in their experience, five-star hotels in the UK were not of the same quality as five star hotels in other countries, such as in the MENA region: '*In my view, five stars in the UK is not the same five stars in Tunisia*' (FG4C4).

Group 3 was in agreement that Libya did not have massive hotels like Dubai, but may have one or two five-star hotels in the major cities. The group was then asked what kind

of accommodation they would seek for a holiday; they pointed out that the quality of the accommodation depended on the type of visit, e.g. business or leisure.

On the matter of resources, the group discussion then moved to the subject of transport. Here the groups demonstrated similar impressions about Libyan transport to those of accommodation: *'I have no idea about Libyan transport, but I guess there are good networks in the cities, but that these are not so good outside*' (FG3C1). Another member stated: '*I do not imagine there are a lot of trains*' (FG3C3), while yet another declared: '*some people still use camels outside the cities*' (FG3C2).

In a comparison between Libyan accommodation and transport and that of its competitors, the group assumed that Egyptian accommodation had more variety and choice because Egypt, Tunisia and Morocco have more of a tourism focus. Consequently, it was assumed that the accommodation of Libya's competitors was likely to be of a higher quality than Libya.

According to the group, it was apparent that British people would not expect that the signs for tourism in Libya would be in English language. However, the majority of the group 3 supposed that there would be some international signs, such as those of hospitals, police stations and tourism attractions (FG3).

Information availability is an important issue for destination marketing. Tourists often search for information about destinations before visiting a destination. Clearly, information is also very important for tourists during the actual visit so that they have an

adequate amount of knowledge about tourism attractions, directions, accommodation and visa procedures. They also need to know what the local culture is like and to understand what they can experience. As discussed earlier, there is an absence of marketing activity to promote the country outside, but the discussion groups believe there is a huge amount of information in the internet about the country.

A member of group 4 had looked on the internet for items concerning Libya prior to the interview and had read a lot of information. However, the group could not guess at the information availability on the internet while tourists were visiting Libya, but guessed logically that if a country is tourism-oriented it may have a lot of available information as well as English signs, as in Egypt, Tunisia and Morocco. However, in Libya's case, the group doubted they would find enough information or English signs: '*I could not imagine English signs anywhere in Libya*' (FG4C11).

6.7.4 Comparative advantage

It can be seen here that the important issue emerging in this study is that groups 3 and 4 had no perception or ideas about Libya's tourist and cultural attractions, and this included its historical sites, ruins, and archaeology. Because of this lack of awareness, the group also demonstrated an ignorance of Libyan cultural festivals, events and family holidays, which made it impossible to make a comparison between Libya and its competitors. However, as already indicated, the group pointed out that they had learned about Egyptian history and ancient civilisations in school. One member (FG3C3) stated: '*We can recognise that Egypt has a lot of historical sites and places to visit*'.

Landscape is one of the factors that motivate tourists to visit a particular place; both groups 3 and 4 perceived Libya as being hot in summer and warm in winter, and the country was seen as a huge desert; the majority of participants were unaware that Libya has a coastline. The groups were also asked to express their expectations about Libyan beaches: FG3C2 expected Libyan beaches to be '*beautiful, stunning and nice'*. FG3C3 also supposed that with limited numbers of tourists, the beaches would be cleaner and less crowded. Libyan beaches were considered to be the same standard as Egyptian beaches; the groups also indicated that Tunisian beaches are very pleasant. Surprisingly, FG3C3 members considered Moroccan beaches to be quite dirty and busy.

A member of the group (FG4C11) stated: '*We can recognise that Egypt has a lot of historical sites and places to visit, while Libya is known for its political issues*'. Another member (FG4C9) added: '*I have heard about Leptis Magna, I knew it from my parents*.

The groups were asked if they would be able to recognise any culture festivals and events, but group 4 could not recognise any specific cultural festivals and events relating to Libya. However, one member explained that as Libya is part of an Arabic and Muslim community, it would celebrate festivals such as Ramadan and the Eid.

> *I know that Arabs has have a festival at the end of Ramadan, but I don't know of any specific culture…and Libya could a good destination for families*.
>
> (FG4C8)

> *We could not see any differences among Arabic cultures, it was like trying to identifying the differences between the English and Scottish culture*.
>
> (FG4C7)

It seems that the people in the MENA region are seen as having the same culture, and people in the West are not able to differentiate between them, particularly in the UK.

6.7.5 Local communities

The groups felt that they would be able to communicate with local people and expected that the English language would be widely understood in Libya; however, the participants would go to tourism destinations even when the people do not speak English. In their opinion, destinations with a good tourism experience are more likely to use foreign languages fluently; this can be seen in Egypt with English and in Morocco with the French language.

The study does reveal the non-visitors saw Libyans as suspicious and unfriendly. Clear evidence came from a member of focus group 3 when she observed:

> *I don't think I had a particularly strong image before, except perhaps some negative images we had from politics and the media…that's a negative image I suppose.*
>
> (FG3C1)

Local people in Jordan, Egypt, Tunisia, and Morocco appear to have a better image than Libyans. FG3C3 pointed out that: '*Tunisian and Moroccan people are very friendly and seem very keen to talk to you*'.

Food and drink are also seen as being part of the local culture. In general, the focus group members have no idea about Libyan food: '*I would not know what traditional Libyan food was*' (FG3C2). However, some members of the groups supposed that Libyan food would be more like that of Jordan, Egypt, Tunisia, and Morocco, that is,

delicious and spicy. In addition, some members considered that Egyptian food would be better than Libyan food.

> *As Libya is not a developed tourism destination, we assume that Libyan food may be spicy and may additionally be difficult for vegetarians or those with specific dietary requirements*.
>
> (FG3C4)

The moderator realised when the groups were having drinks that it was necessary to ask a vital question about their perceptions on drinking alcohol in Libya; both groups considered that alcoholic drinks and wine would be restricted in Libya, but would be permitted for tourists: '*Libya is a non-alcoholic country, so I assume that drinking alcoholic is not allowed in Libya*' (FG3C2).

Another member believed it was possible to drink alcohol just inside hotels or at specific places, and considered that for a short holiday, a group would not mind visiting the country, while for a longer holiday some would probably choose an alternative destination. A member in group 4 claimed: '*Alcohol is a part of my life'*. He also declared: '*I was looking at going to Morocco for a honeymoon and my mate would not come because there was no alcohol there*'.

According to the Sky Blue Medical Group (2009), over 90% of British adults drink alcohol, men drinking the equivalent of a pint and a half of beer a day, while women consume about half a pint; about 20% of men drink more than three pints of beer at least once a week. It can therefore be concluded that the British prefer destinations that offer alcohol. However, the members of focus group pointed out that they would go to destinations that have no alcohol for short-haul holidays.

6.7.6 Destination planning and management

Destination planning and management is a way of exploiting tourism resources effectively and efficiency. This section therefore reviews the perceptions of British non-visitors regarding Libya's planning and management. The study revealed that people in the UK believed Libya to be an oil-rich country, basing their image on this fact. Therefore, as discussed earlier, the selected sample of focus groups assumed that Libya had the financial resources and time to establish high quality hotels, airports, resorts, and a tourist infrastructure in the main cities. Some even went further and compared it to Dubai. However, the group members indicated that they do not think of Libya as a tourist destination, the country being associated with all sorts of risks.

Tourist safety and security were identified as the most important image attributes by the focus group interviewees (FG2). The study also revealed a strong relationship between the term 'terrorism' and the name of Libya in the UK. The Lockerbie case had reinforced the image of Libya's image as an unsafe place to visit (FG4). This had occurred in spite of the fact that the majority of British people have heard about terrorism attacks in Egypt, Tunisia and Morocco. However, none of the group members had heard about any terrorism attacks or explosions occurring in Libya. One member (C2) of focus group (4) said: '*I cannot imagine going alone to Libya; I would prefer to go in a group*'.

In addition, people in the UK would seem to believe that there are a limited number of companies across the country running tourism businesses and operating tourism trips

(FG3). Despite the currency value not being mentioned as an important factor for British tourists (it must be borne in mind that the focus groups were conducted on a time when the British pound was strong against other currencies) (FG2), the groups were expecting Libya to be a cheap destination, cheaper than Egypt and about the same as Tunisia. Libya was also not considered a place for tranquillity; rather it was deemed to be a noisy place, influenced by Arabic culture and with big families. Similarly, Egypt was also thought of as a crowded destination. Potential tourists in the UK further believed they could use credit cards and draw cash at any time from cash machines in Libya, and this applies to other MENA countries (FG4).

All the group members were surprised when they heard that British people have to apply for a visa to visit Libya. Additionally, they indicated that they expected Libya to be a clean tourism destination, and did not doubt that Libya would be cleaner than its other competitors in the MENA reign.

6.7.7 Service quality

The concept of service quality includes all aspects of quality that tourists receive during their visit, including accommodation, transportation, communications, information, food, drink, amenities and tour services. In this regard, the group members imagine that Libya has quality hotels, resorts and good transport networks: '*The quality of roads in Tunisia is good but there is so much traffic and no control at all, and I assume Libya the same*' (FG4C3). It was also assumed that people drive fast and do not respect the traffic rules; this perception prevailed for the whole of the MENA region.

Another member (FG4C9) supported her colleague's point of view, adding: '*I would say that in Libya people drive without holding a licence and drive fast....And safety on the roads is a concern*'. The quality of the transport is perceived as being of a similar standard to that of the major MENA countries: '*I think Libya has a basic infrastructure….and I think the Egyptian tourism infrastructure is better than Libya's because they already have tourists*' (FG4C5). 'The group also assumed there would be a lack of international brand names in Libya and one member stated: '*I could not imagine any of us visiting Libya for shopping; the shops are traditional like a Souk rather than modern complexes*' (FG4C8).

Clearly, Libya has an image problem, and what makes matters worse is that it does not pay attention to enhancing its image abroad. Consequently, as a result of the absence of marketing and promotion for the country, according to the focus group members the majority of British people have no idea about the tourism heritage of Libya, the cultural attractions, the historical sites, antiquities or the archaeology. In addition, the group could not identify any differences between the cultures of Egypt, Libya, Tunisia and Morocco. However, Egypt was recognised for its superior tourist attractions and sites as well as the quality of its accommodation and infrastructure, in comparison to other destinations in the MENA region (including Libya). In fact, it would seem that Libya is seen as a desert, is dry and hot with spicy food and has a similar culture to Arab countries, with good quality hotels and roads.

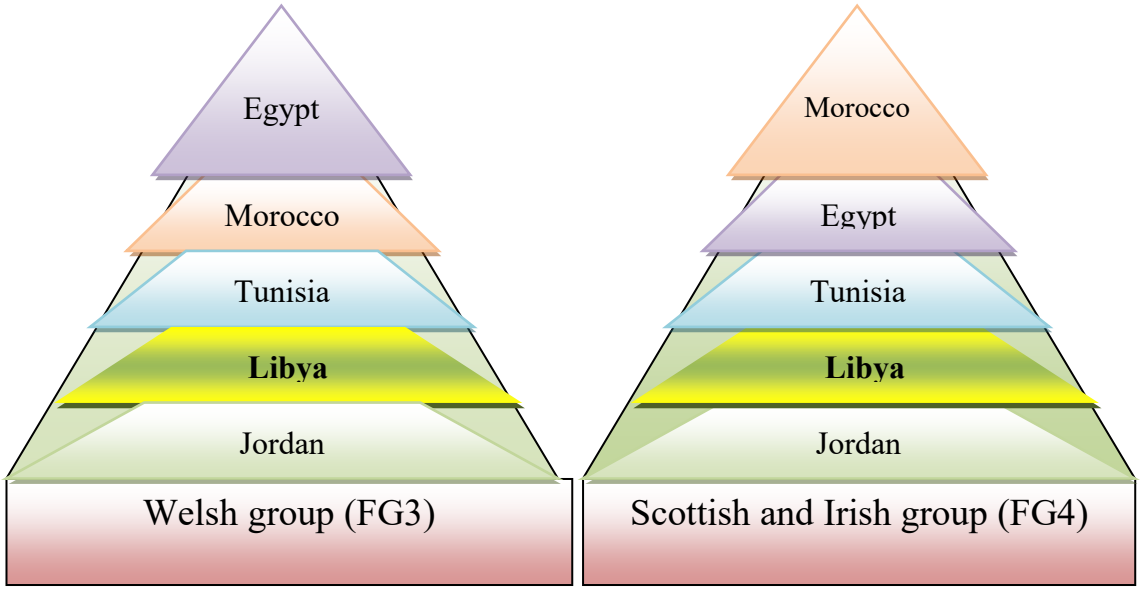
6.8 The role of 'word-of-mouth' communication in marketing Libya

The use of word of mouth communication is a powerful tool in destination marketing, particularly for those who do not have effective marketing and promotion activity. Destination loyalty is completely different to product loyalty; the tourists were satisfied with what they got from the holiday and that their expectations had been fulfilled. However, most of the tourists preferred to visit another destination rather than repeat their visit, if they had the opportunity. From the focus group meetings there was only one member in focus group had heard from his father about Libya. Despite the significant role of word of mouth as discussed in Chapter Four, the researcher was unable to measure its impacts on the British non-visitors society due to a very low number of British tourists who visited Libya.

6.9 Libya's branding and positioning

Libya wants to be a main player in the tourism market, but clearly the country suffers from chronic bad planning and management in marketing and promotions. A good indication of this is that Libya is not yet branded as a tourism destination. In addition, the country has a low position in the perceptions of potential British tourists. Focus group interviews (3, 4) for Wales, Scotland and Ireland rated Libya and Jordan as the last tourism destinations to visit. However, Libya has a better chance than Jordan, but it is clear that the focus group members prefer to visit either Morocco or Egypt as a first choice when they think of visiting MENA countries. Figure 6.2 demonstrates Libya's position among its competitors in the MENA region.

Figure 6.2: Libya's positioning among its competitors in the MENA market as rated by the focus groups



The findings of this study resemble the results of Iragi (2007) who considers Egypt to be a second tourism destination after Turkey in the Mediterranean market. The research indicates that Libya has a low position as a result of low awareness and the country's negative image in the UK market.

6.10 Summary

This chapter examined the first phase of Libya's sustainable and competitive destination model (demand side). It also determined the features of Libya's image in the UK from the perspectives of focus group members (non-visitors to Libya). In addition, it provided the relevant background concerning the role of the British media in conveying a negative image in British minds as well as investigating the function of British tour operators and 'word of mouth' communication for promoting the country in the UK. The study also revealed a lack of awareness of Libya as a tourism destination in the perceptions of potential tourists, with the media being full of Qudaffi's image and

political issues. This has resulted in a low rating for Libya among it is competitors in the MENA.

Chapter Seven analyses Libya's tourism industry, through using comprehensive investigation, data and information were collected by adopting four research methods that are appropriate for qualitative approach, which are; semi-structured interviews; document analysis; participant observation and audiovisual materials. However, data and information are collected from five source of information (stakeholders) who involved in Libya's tourism industry which are; government officials, tour operators, hotel managers, tourists and local residents, the analysis explores crucial issues and challenges that face Libya's tourism industry, particularly after lifting the UN sanctions in 2003, it also evaluates the ability of Libya to compete in the MENA tourism market.

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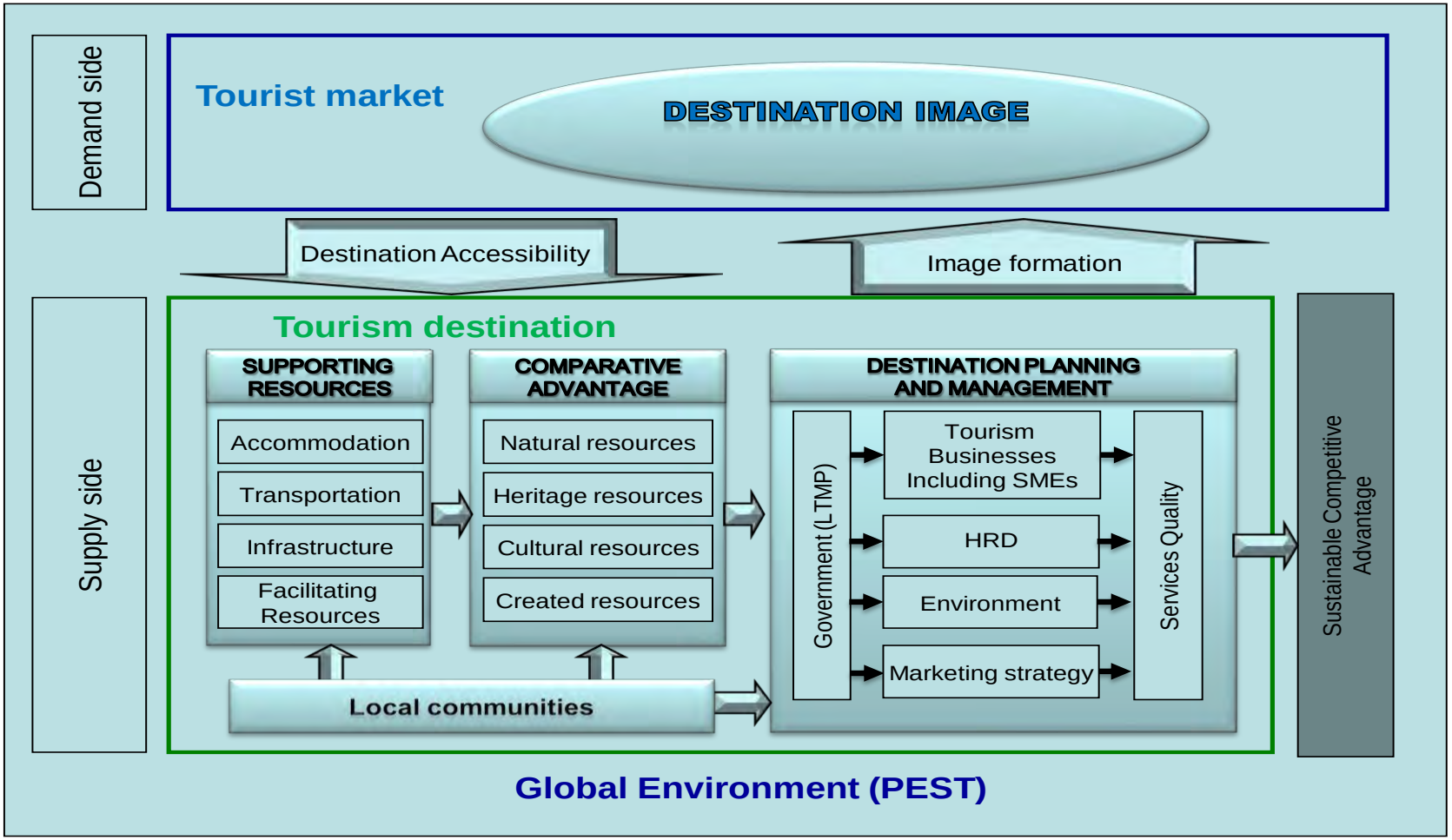
Chapter 7: Libya's tourism industry

7.1 Introduction

This chapter makes a comprehensive evaluation of the Libyan tourism industry from the supply side using the SCDM (see Figure 7.1). The SCDM framework incorporates the key issues relating to the tourism industry which lead to sustainable competitive advantage these being: destination accessibility, supporting resources, comparative advantage, local communities, destination planning and management and the global environmental impact on tourism development (see Figure 7.1).

To achieve high reliability and validity, five data and information sources were employed to analyse Libya‟s tourism industry (government officials, tour operators, hotel managers, tourists and local residents) and four main qualitative data collection methods (semi-structured interviews, audiovisual materials, participant observation and document analysis). All the photographs are the author‟s own except where otherwise stated. Some emerging issues relate to more than one theme, e.g. employee performance and gap of languages are considered under the theme of accommodation despite constituting a major part of the Human Resource Development them. The issue of the quality of accommodation, transportation and infrastructure will be discussed in more detail in the section on service quality. Similarly, destination image (discussed in Chapter Six) is also a marketing strategy function.

Figure 7.1: The SCDM applied for evaluating Libya's tourism industry



7.2 Destination accessibility

Destination accessibility includes the procedure for obtaining a visa, and the obstacles that tourists may face at entry points. Obtaining a visa to visit Libya is not easy for individuals and much more difficult than for Libya"s competitors. However, for tourist groups this is less problematic. British tourists indicated that the procedures have become easier: they are now requested to have a page in their passport translated into Arabic and must say if they have visited Israel. „*Four or five years ago it was difficult for Westerners to come to Libya, but now it has become easier…so we did not actually do the visa ourselves; we just organised the translation of the passport*" (Tourist5); „*I have been told that if I want to come by myself it might be difficult*" (Tourist3).

> *If you book as a group though a tour operator, it is all dealt with by the agency and you do not have to send your passport away, so it's very straight forward, and normally with a group of this kind you would book maybe six months before, and then they deal with the visa; so it's just part of the arrangement.*
>
> (Tourist4)

The implementation of the new procedures, which require all foreign tourists to have an Arabic translation page in their passports, has had a direct impact on the number of international arrivals, particularly for cruise tours. A manager at the GBTTI maintained that this was Libya"s right, but he later acknowledged that the implementation of the new regulation was not well organised or well planned.

> *Libya requires an Arabic translation in tourists' passports. This law was issued in 1984. Do you think that I can enter Britain with a Libyan passport? The law was frozen in the past due to UN sanctions, but Libya has the right to ask for an Arabic translation… However, it has had a negative effect on tourism, and the state authorities should give tour operators a chance before implementing the law. Each country has the right to have its own language in tourists' passports, but this does not work in practice. Ultimately, the decision was political.*
>
> (GBT1)

Tour operators arrange Visas for tourists by applying for permission from the Immigration Department and tourists receive their visas when they arrive at the airport. The tour operators were asked to describe the procedure for obtaining tourist visas and how long it would take. One tour operator explained:

> *It takes about a week to 10 days; we face some difficulties with this, especially with cruises, because some of travellers make their reservations on the day of boarding. There is also a problem with the fees of the tourists through the cruises. I have a Spanish cruise which stays less than 24 hours, and I have to pay 15.5 Libyan Dinar. We want tourism but we complicate it for ourselves, and they ask us to write down lists in Arabic. This is a bureaucratic knot; this is one of our weak points which others do not have. The immigration officers are also inflexible.*
>
> (TourOp1)

> *It takes about 10 days and we provide the Immigration Department with the tourists' information ten days before arriving. If it is too long, for example, if we get the permission on Thursday, we have to wait three days because Friday is a holiday in Libya, while Saturday and Sunday are a holidays in the UK. It is a long time compared with our neighbours, where tourists can enter without a visa or sometimes without a passport.*
>
> (TourOp2)

Hotels also have difficulties obtaining visas for their customers and they have asked the government to facilitate visa procedures.

> *The problem of getting a visa not only faces hotels, but tour operators as well; there are a number of customers who have cancelled their reservations due to the difficulty of obtaining a visa. I hope the government takes action to facilitate visa procedures.*
>
> (Hotel5)

As regards procedures at entry points, there is complete agreement among tourism stakeholders that there is insufficient management at airports and entry points, making local airlines uncompetitive: „*The plane landed at three o'clock and we did not leave the airport until five thirty. I think it is a complicated procedure*" (Tourist1).

> *When we arrived at Tripoli Airport we had to wait to go through customs and to be registered; it was quite a long wait and seemed to us quite slow. This was because there were two people there: the first man looked at the passports, entered the information into his computer and then passed the passports to the second man who looked at the passports and stamped them; it all seemed quite slow.*
>
> (Tourist5)

> *It could be better in practical ways. When we arrived on this holiday we had to wait one-and-a-half hours just because there were not enough staff. Almost none of the immigration staff spoke English.*
>
> (Tourist4)

> *Beginning with the airport, every day has a system and new regulations, the operating systems at the airports are poor and disorganised and they constantly change the flights, particularly the local flights; many flights have been cancelled. Last year at Christmas (2006) we had a group of 65 tourists whose flight was expected to depart at 1:00 am; the flight was cancelled and the group stayed until the next day. Can you imagine the situation?*
>
> (TourOp7)

Local people made excuses for the poor service at the airports in the past, but seven years since the lifting of UN sanctions people cannot accept any more excuses:

> *In the past we were unable to judge and say it was poor, but now compared with other Arab countries we can say it is poor. In the past there were UN sanctions but this is no longer the case, so there is no reason to stay in this poor situation. It is the Government's responsibility.*
>
> (Resident7)

7.3 Supporting resources

Supporting resources are the facilities used by the tourists during the visit, which include accommodation, transportation, infrastructure and the facilitating resources.

7.3.1 Accommodation

Accommodation is a major issue and a key element of the tourism industry. Libya"s accommodation competitiveness in the MENA region was widely discussed with stakeholders. It has been decided to divide this issue into sub-sections, selecting the

most relevant data. This section considers the quantity and quality of the existing hotels in Libya, hotel prices, occupancy and seasonality, the types of food and beverage provided in the hotels, the reasons behind the phenomenon of reservation cancellations.

7.3.1.1 Accommodation types and quantity

Libyan tourists exclusively use hotel accommodation. Libya hotels vary considerably: some are state-owned; some are private hotels owned by individuals or local companies; some are joint ventures with foreign investors. There are insufficient hotels at present, there is only one 5-star hotel in Libya, which is the Corinthia Bab Africa (see Figure 7.2). According to the recent hotel categorisation conducted by the GBTTI, a number of 5-star state hotels have been downgraded and categorised as 4-star hotels (as presented in Figures 7.3, 7.4). It should also be pointed out that hotel standards in Libya are not on the same level of international hotels. A significant comparison between Libya‟s 5-star hotels and some Libya‟s competitors will be discussed later in chapter eight.

Figure 7.2: Corinthia Bab African Hotel-Tripoli 5*

The private hotel sector is more reliable and competitive than the state sector: state hotels suffer from many obstacles mainly relating to legislation, poor leadership and low salaries: *'In general, the hotels are very variable: the private hotels are better than the government ones, because the people working there take an interest, while in the government hotels the staff do not seem to care*" (Tourist6).

> *We ask for freedom and flexibility in terms of legislation and legal procedures, including the recruitment of foreign workers and internal rules such as purchasing procedures. I'll give you an example: look at that electrical socket; it was fitted 25 years ago and if we want to change it now, we have to obtain formal permission and get three offers from three separate electricians. The financial controller will then select the cheapest offer which will stop working after six months. Everything requires a procedure like this, including the purchasing of vegetables, fruit, meat, and so on. To be honest, I buy cheap things to avoid being accused of corruption, and when we are dealing with managers who are unaware of the sensitivities of the hospitality industry, inevitably the quality services declines.*
>
> (Hotel2)

> *The vision and objectives of the private sector are more obvious than the state sector as the private sector is very keen to satisfy its customers. state administration does not care about the customers, employees or reputations.*
>
> (Hotel1)

Figure 7.3: Grandee Hotel Tripoli 4*

Figure 7.4: Guzaltek Hotel Musratha 4*

Hotel Manager 4 considered that there should be more private 5-star hotels and private hotels. Other accommodation types, such as guest houses and youth hostels, are not in operation in Libya. „*In Europe we have youth hostels which are very cheap and very basic but very clean so that people can stay for one night and then continue with their journey*" (Tourist3).

> *The accommodation is very weak in terms of quantity and quality. If we received 10 thousands tourists in Tripoli (this being the main destination as most tourists spend at least two or three days in it) half of them would spend the night on the streets.*
>
> (TourOp1)

The quality of hotels in Libya is discussed in detail later in section 7.7. In general, hotels lack good management, quality and quantity. „*The grade of Libyan hotels do not meet international standards: If you consider our 4-star hotels, what you find is not equal to 4-star hotels abroad*" (TourOp3). Another hotel manager (6) added „*When I look at 4-star hotel photos in Tunisia and compare them with 4 star hotels in Libya, I can see that 4-star hotels in Tunisia are equivalent to a 5-star hotel in Libya*".

7.3.1.2 Hotels prices, occupancy and seasonality

According to the hotel managers, hotels in the main cities are full for most the whole year, whereas those in smaller cities and tourist destinations are full in the tourist season, with less than 30% occupancy for the rest of the year. The best description for this phenomenon was expressed by the hotel manager (4), who pointed out that the profit they make in six months (October to March) , they lose again in the other six months (April to September): „*The occupancy rate varies from 60% to 100% in the high*

season" (Hotel3); *'For six months the average occupancy can reach 100%, while the remaining six months is low season with an average of around 20%*" (Hotel7).

> *From September to December the average occupancy rate is between 90% and 100%, while in January, February, March and April the average rate fluctuates from 50% to 75%. However, for the low season in the summer, the average is around 20%.*
>
> (Hotel6)

> *The average is not less than 85% at any time. We do not have working seasons, but we can recognise that the occupancy rate differs in the week: for example on Thursdays and Fridays, the occupancy rate is about 60% while between Sunday and Wednesday, the occupancy rate reaches 100%.*
>
> (Hotel2)

The Corinthia Bab African Hotel has the monopoly as the only 5-star hotel and is endeavouring to make as much profit as possible before other 5-star hotels open in Libya. However, the GBTTI controls hotel prices by determining the maximum and minimum prices for each category: „*The cost of a single room is 180 Dinar (£90 Sterling) and double rooms cost 220 Dinar (£110 Sterling)'* (Hotel2); „*Prices vary: a single room costs 120 Dinar (£60 Sterling), a double room is 150 Dinar (£75 Sterling), with the suites being 220 Dinar*" (Hotel6). These prices are higher than Libya"s competitors (see Appendix E).

7.3.1.3 Food and beverage

Libyan hotels, restaurants and cafes offer a diversity of food, mostly presented as a buffet with soft and hot drinks, tea, mocha and coffee. However, they do not offer alcohol, for cultural reasons (see section 7.4.3). Although some hotels and restaurants do not provide high quality food, traditional Libyan food is good and very attractive to tourists. Additionally, hotels in Libya do not seem to be able to identify tourists" needs

or food preferences. There are a few good restaurants in Tripoli, but the majority are not good with poor hygiene, particularly those beside the motorways (see section, 7.7).

> *We offer a diversity of food types depending on the customer's wishes; Libyan food is acceptable to tourists, particularly Italian food; tour operators often ask in advance for a particular type of food for the tourist groups.*
>
> (Hotel3)

> *We offer the full service of 5 star hotels; we have a number of restaurants opened 24 hours and we have Italian and Moroccan restaurants. In addition there is another restaurant offering Far Eastern food, including Indian, Chinese and Japanese food. We also offer other international food and have a day for Arabic food, a day for Mexican food, a day for Italian food and a day for seafood.*
>
> (Hotel5)

However, tourists have indicated that traditional Libyan food is appealing and delicious, despite a lack of chefs, these mostly coming from Egypt, Tunisia, Morocco and Sudan. However, Libya does not seem to have high quality food. Other critical issues here are the lack of awareness towards other cultures and misunderstandings between the tourists" culture and the local culture. Because of cultural differences, both Libyans and tourists do not fully understand each other. For example, while Libyans see providing plenty of food as a gesture of welcome and generosity, tourists see this as being impolite. One tourist expressed the view that people should respect tourists and stop overwhelming them with food.

> *The food is very good; it can be exceptionally good, and yesterday we went to a Tripoli restaurant and had an excellent variety of food. However, we do not like large amount of food or three main meals a day and we notice that the Libyans do not eat all the food on their plates.*
>
> (Tourist2)

'Libyan food is very good, and what we have been offered here is always of good quality; we have been impressed by the food" (Tourist6). „*Yes, it was lovely, beautiful. I*

liked the soup; it was sometimes spicy, but I liked it. There were also salads and vegetables: the salads are very nice you know, and we had chicken, lamb and rice; it's very nice, the food is very good" (Tourist3).

> *There are a number of restaurants offering traditional food, and the tourists are happy with them. Most of the Libyan restaurants offer almost the same type of food, so there is no variety of food in Libya. In addition, the quality of the food and services is not high.*
>
> (TourOp5)

7.3.1.4 Reservation cancellations

A number of tour operators raised the issue of hotel reservation cancellations. Apparently, the government had intimidated some state hotels to accommodate government guests, conference participants or people attending government meetings because of the limited number of hotels in Libya:

> *This has happened many times in the past. Do you know that in the whole country there are 12,000 beds and half of them are useless, so Libya's full capacity is 6,000 beds. The government conducts international festivals and conferences and the only way to accommodate the government guests is by cancelling the normal customers and individual reservations. However, the situation is now improving.*
>
> (Hotel2)

> *This occurs under unusual circumstances. It happened once or twice with us; once there was a crew that was leaving the hotel, but their flight was cancelled so they stayed for another day. The hotel was full and there was a tourist group who had reserved the crew's room. I was in a bad position and I asked the tour operator to refer the group to another hotel. The tour operator solved this problem, changing the itinerary of the trip and stayed in another city.*
>
> (Hotel7)

> *Some foreign tour operators stopped sending groups due to hotel cancellations. We had bad experiences with hotels cancelling our reservations and they refused to give us a formal letter for the cancellation. Moreover, the tourists are not happy with changing hotels even if the new one is better, because they had left their old hotel details with their parents and friends.*
>
> (TourOp6)

It can therefore be concluded that accommodation is the backbone of the tourism industry and can generate a considerable number of job opportunities for local communities, but it is hard work to develop the hospitality sector, particularly in HRD and service quality areas, which will be discussed later.

7.3.2 Transport

There are various means of transporting tourists from one place to another, the main ones being planes, ships, trains, coaches, buses, taxis, private cars, vans and bicycles. In this study British tourists predominantly made use of British Airways not because they were loyal to British products, but due to the weak competition from the Libyan local airlines, which are unreliable and make irregular flights (see Figures 7.5 and 7.6).

> *We know that British Airways is reliable, while Libyan airlines used to be very good thirty years ago. But at the present time, it is not considered very reliable; maybe it is getting better; Alafricia, I do not know. We used Alboraq airlines; there was an hour-and-a-half delay waiting for the internal flight.* (Tourist6)

A remarkable number of tourists come to Libya on cruises, but this number decreased in 2007 as a result of the new requirements for obtaining a visa (TourOp1); also see Figure 5.2. The following quotes are organised to make sense of, and to organise, the opinions of the Libyan tourism stakeholders.

Figure 7. 5: Libyan airlines

Figure 7. 6: Arrival Board at Heathrow airport

Transportation is not great, the roads vary but some seem very good.
(Tourist4)

Transport is a problem as we do not have a public transport system.
(Resident2)

*Transportation has been improving recently but transportation companies are small in size with limited resourc*es.
(Resident8)

Transportation nowadays is better than before, but at certain times it is inadequate. In general, transportation for tourism purposes is fine, but it is still limited. The 4-wheel drive cars are other obstacles to tourism, as in the past we needed security permission, but now this is not required. However, buying a new 4-wheel drive car is expensive and without any financial support this is hard.
(TourOp2)

As regards transport, no tour company is operating a transportation service and therefore tour operators rent private buses. These buses run well and are clean; the drivers are good as well.
(Resident5)

Taxi and bus drivers who do not respect traffic rules have also been criticised; disregarding traffic rules and traffic lights is a common phenomena for most Libyans, not just bus and taxi drivers. Figure 7.7 shows a man with a police car which did not

stop for the pedestrian. Another difficult phenomenon is that local residents close the roads for funerals and weddings. Many Libyans marry during July and August when the schools are closed. It is therefore unsurprising that roads are blocked by tents and a huge number of cars (see Figure 7.8 below).

Figure 7. 7: Disrespect for a pedestrian crossing

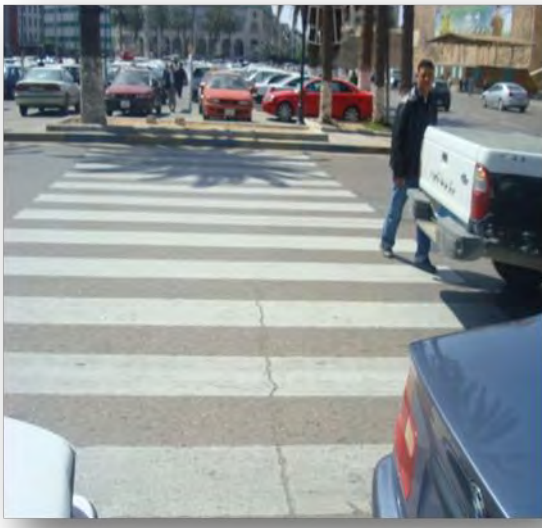


Figure 7. 8: A wedding tent blocking main street

„*Taxi and bus drivers do not respect the traffic rules*" (Resident6).

> *This is one of the negative aspects of Libya: on the roads you see a lack of respect for traffic lights, dangerous overtaking, high speeds, playing with cars and parking on pavements. The tourists wonder how we can drive like that. This problem is related to a lack of respect for the law.*
> (TourOp3)

„*We are trying to avoid traffic jams and require our drivers to be good drivers, not speeding, not using the horn and so on*" (Tour Operator 4); „*You notice clearly that drivers go through red lights, nobody stops on the zebra crossings for pedestrians….With the current situation with hotels and transport I doubt we can receive one million tourists by 2008*" (Tour Operator 7). Obviously the transport sector

needs a little attention from the government and an observation of the traffic rules coupled with extensive awareness programmes for local residents. Additionally, the government must fight negative cultural aspects.

7.3.3 Infrastructure

Infrastructure is a vast topic. Here the study focuses on the infrastructure relating to the tourism industry, such as roads, airports, public amenities, tourism signs and electricity.

7.3.3.1 General infrastructure

There is unanimous agreement among stakeholders that Libya‟s infrastructure is poor despite recent developments. Moreover, a number of Libyans question whether the government can establish a competitive infrastructure because of the absence of good planning, the existence of corruption and the instability of the GPCs and related authorities. For this reason, projects take considerable time to finish or may never be completed. This is a big challenge to Libyan development. „*The infrastructure is very poor and not based on planning. Recently in Tripoli and Benghazi there has been a kind of improvement, but not in other cities; development should be planned for the long-term, not the short-term*‟ (Resident8).

> *Infrastructure development is just theory and talk. In Tripoli this is just beginning but outside Tripoli there is nothing. In Sabratha, for example, the roads and hotels are poor; in fact there is nothing and this is not a tourism destination. The people who are responsible for implementing the plans create obstacles and the development process and rehabilitation are progressing very slowly.*
>
> (Resident6)

> *Libyan infrastructure is poor and I hope that the government will make improvements, but it is not enthusiastic about doing so. We heard about this a long time ago and they have not started yet, and even when they*

> *demolish buildings, they do not build anything instead but leave a horrible mess.*
>
> (Resident2)

> *Libya has seen dramatic changes recently and there are big economic reforms; I believe that if this is achieved, it will bring good results and it will be possible to arrange the Football World Cup in Libya! Reliability is important in country promotions.*
>
> (Resident4)

This could improve the infrastructure and tourism facilities, without losing the friendliness, hospitality, and traditional values (Tourist2). Tourist 2 highlights an important issue: infrastructure developments should take into account the protection of the culture and heritage.

7.3.3.2 Airports and entry points

Libya has a number of airports; the main one is Tripoli International Airport which was established more than twenty years ago (see Figure 7.9). In 2008, Western construction companies started upgrading and expanding this airport and another contract was signed to develop Benghazi airport and the main entry points of Ras-Jadiar and Imsaid (GBT1). However, up until the present time, airports and entry point services have not been adequate and are not up to a competitive level. According to the tour operators, Libyan airports and ports are outdated and do not have any modern facilities (see Figure 7.10). Even when the researcher travelled from London to Tripoli by Libyan Airlines and tried to use the toilet on the plane, the sink was blocked and not functioning properly. In addition, the luggage was disorganised and there were no trolleys inside the airport.

Figure 7. 9: Tripoli International Airport

Figure 7. 10: Tripoli International Airport

„*In my experience, the state of our infrastructure remains very poor: the entry points on the eastern and western borders are miserable*" (Resident8); „*the services at the airports and entry points are not so good and there are still some barriers; we do not know where the problem is*" (Resident5).

> *There are a lot of problems in this regard, for example delays in local airlines where sometimes the airlines cancel the flights. Additionally, the people at the entry points are not qualified to deal with tourists and lack foreign languages; there is also a need for direction signs.*
>
> (Resident6)

7.3.3.3 Roads and signs

Roads and signs enable tourists to move from one place to another. The only good aspect of the infrastructure is that the roads are good in particular sections of the country (see Figures 7.11 and 7.12). When travelling from Ras Jidair to Al Salum (on the eastern border) for a distance of about 1700 km, there were mostly no signs. Where they

did exist, they were in a poor condition and neglected (see Figures 7.13 and 7.14). Musrata is exceptional with signposts throughout the city. However, the signs are only written in Arabic, although the GPC has given permission for the use of foreign languages for tourism purposes.

Figure 7. 11: Airport road – Tripoli

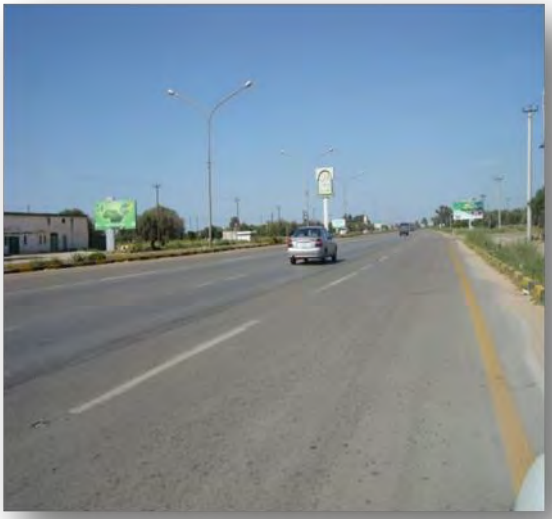


Figure 7. 12: Alnasur Street, Tripoli

Figure 7. 13: Sign for Gadamas

Figure 7. 14: Sign for Zeletun

> *The roads are very good compared with other countries. The signposts, however, are mostly poor, and if you want to attract tourists you have to translate the signs into English.*
>
> (Tourist6)

> *The roads are good and there are some humps and checkpoints, which is good. However, we drove all the way from Benghazi back to Tripoli and the signs were not good for westerners because they were written in Arabic, and there did not appear to be many signs anyway.*
>
> (Tourist5)

„*Even in the museums the signs are not written in English, in spite of the Government allowing the use of foreign languages for tourism purposes'* (TourOp6); however, „*the Ministry of Tourism did place some signs in the desert but these were incorrect and of poor quality*" (TourOp7).

7.3.3.4 Public amenities

These include electricity and water supplies and public toilets. „*The GPC of Public Amenities is responsible for public toilets; however, there are no services such as public toilets and restaurants on the highways and main streets'* (Resident4); *'the toilets could be better, there is no toilet paper*" (Tourist1); the amenities are „*mostly bad, a few are ok, but mostly they are inadequate and in a bad condition*" (Tourist6); public toilets are not good, the water often does not work, they are often dirty and water is around everywhere(Tourist5);„*the public toilets do not exist and, even in Leptis Magna and Sabratha, where there are two or three toilets, they are in a bad condition. From Tripoli to Benghazi (about 1200 km) there are no public toilets on the motorway'* (TourOp6).

The tourists have therefore indicated that public toilets are very limited and where they do exist, they are in a very poor condition. Consequently, tour operators use the hotel

and restaurant toilets on the way. Most of the public toilets also lack toilet paper and hand dryers for the Western tourists.

7.3.3.5 Communication systems

Landlines, mobile phones and the Internet are the main communication systems in Libya. However, landlines do not work well and mobile phone networks are better. In addition to this, use of the Internet for communication is still limit and inadequate.

> *I am talking initially about the landline; we were in Benghazi in a 4-star hotel where it should be possible to use the telephone from your room. Nevertheless, this used to be possible but cannot be done now. You have to go downstairs, go into a phone booth and dial the operator. Hence, a system which did exist, does not work anymore. As you know, there are two mobile networks, one of which has good coverage while the other one has narrow coverage. Not all British mobile phones will work here.*
>
> (Tourist6)

> *The main problem was that of the communications. I have been to many hotels and in every hotel I tried but could not contact my family. Do you think it will improve?*
>
> (Tourist3)

> *We have a home page on the internet and we used to offer an internet service in the hotel, but unfortunately we had to stop due to the poor service of the provider company. It gave the tourists a bad impression of the hotel and the country as well.*
>
> (Hotel3)

7.3.3.6 Using credit cards

Libya is an oil-producing country with a low population and is therefore a wealthy country with surplus revenues. The country spent more than a decade isolated from the international community due to UN sanctions. Foreign technologies did not enter the country during this period. The UN sanctions had a significant negative influence, particularly in relation to the uptake of technology. The banking system was unable to

follow international financial systems. In this regard, tourists can use credit cards only in the Corinthia Bab Africa Hotel and the Al-Aman Bank ATM machines (as shown in Figure 7.15). However, the credit card service is not available for other hotels or shops, airlines, restaurants or cafés. The researcher experimented using his UK Visa card, and the ATM indicated there was no available currency. Resident3, who is a tour guide at the Sabratha site, asserted that the bank does not replenish the cash machines regularly.

Figure 7. 15: ATM machine -Tripoli

We were told that Libya is a cash society and that we should bring Euros and change them at the airport. We did this, but I changed too much and I had to change it back again.

(Tourist2)

I was told before I came not to use credit cards, so I didn't. I changed my money at the airport. I have used Libyan Dinar ever since. You do not seem that familiar with credit cards.

(Tourist3)

There is a lack of currency exchange centres and additionally the shops and supermarkets are not authorised to accept foreign currencies.

(Resident 4)

> *We were informed before coming that credit cards wouldn't be accepted in Libya, so we changed the money at the airport.*
>
> (Tourist5)

Visa and credit cards are an important issue for tourism development and therefore the researcher asked the manager of Visa and the credit card department at the Al-Aman Bank to explain the bank"s position in relation to the use of credit cards (this being the only Libyan bank which can accept Visa and Master Cards). The manager was also asked if there were sufficient ATMs at the tourism attractions. She responded:

> *We are offering a service to foreign tourists who hold Master Cards or Visa cards. They can withdraw from our branches across the country, and the limit that a tourist can withdraw depends upon the limited amount in their main bank overseas. We have about 59 cash machines across the country and we have a number of plans to expand our services. Firstly, we want to open new branches, and provide new cash machines to cover the whole country, we are considering improving the quality of these services.*

She added:

> *All the cash machines have local currency; we have an electronic exchange machine at the Corinthia Bab Africa Hotel. The foreign tourists can use the cash machines: they put in the foreign currency and obtain the Libyan Dinar based on the exchange rate at that time. This is because all the cash machines and branches are connected with our system.*

The manager was asked if all the airports, tourism attractions and other sites had ATMs, to which she replied:

> *No not yet. We have just one in the Corinthia Bab Africa Hotel. We are very concerned about the level of security so our cash machines are based in safe and controlled places where they are easy for tourists to use. There are cash machines in Tripoli and Benghazi airports and the big hotels such as the Tbisti Hotel, but we do not have cash machines in Sabha and Gadamas.*

7.3.3.7 The GBTTI attitude towards infrastructure

The vast majority of Libyans talk about poor infrastructure and cannot see any obvious development on this matter. Therefore, a manager in GBTTI was asked about the necessity for developing the infrastructure and its impact on the tourism industry. His response speaks for itself, revealing the absence of coordination between the executive authorities:

> *The first reason is that the infrastructure is not complete in Libya. In addition, the quality of the hotels does not satisfying the tourists in classes A and B. ....Some tourists also note that there is a shortage of public toilets.* ***This problem is not our business****; it is the responsibility of the amenities' authorities in each province, and* ***there is no connection between public toilets and tourism,*** *as such conveniences are for everyone.* ***You are talking about something that is not a tourism function, and it is not our responsibility****. We have a Secretary for Tourism in each province, but they have insufficient power to persuade their committees to make or establish these facilities. In order to criticise, you need to know the role of tourism first, and you will not get a solution while you are sitting here in the Tourism Office, but you have to go to all the authorities and departments that have a connection with tourism, to explore the shortages and weak points. With all respect to what you are doing, tourism is a series of joint efforts; there are some authorities you have mentioned that are not pursuing developments.* ***This is the result of a lack of awareness and putting the wrong people into particular positions.***
>
> (GBT1: author" emphasis)

Probably the last two sentences are the most telling of the conversation. Clearly the infrastructure has a big question mark over it. Many tour operators have a burning desire to see the development of the infrastructure as soon as possible so that their businesses can also develop, but the locals have different experiences and attitudes towards the government projects.

> *The Libyan infrastructure is not ready for one million tourists. Libya should instead focus on developing the infrastructure of the*

> *communication systems, expanding the airports and transportation, improving the tourist services and getting the visa and immigration procedures sorted out.*
>
> (TourOp3)

> *As is well known, the problem with Libya is that things get started but are never completely finished. I think in Libya everything depends on the political situation.*
>
> (Resident3)

7.3.4 Facilitating resources

Facilitating resources are not the core tourism businesses, such as accommodation, transport or infrastructure, but they concern the facilities that make the trip more enjoyable, interesting and safe. Basically, particular facilities can be established to facilitate tourism. The study explored some facilitating resources that have to be enhanced in order to improve the tourism industry, such as destination safety and security, tourism police management, tourism information sources, entertainment facilities and shopping centres. „*We are still at the stage of establishing the basis of the tourism industry*" (GBT1). However, although Libya is in the early stages of the tourism life cycle, it is important to implement appropriate strategies as early as possible, and if any obstacles occur, they should be addressed and solved by adopting a scientific approach and involving all the stakeholders in the decision-making process.

7.3.4.1 Destination safety and security

Libya is one of the safest tourism destinations not only in the MENA region, but worldwide. This fact is known by Libyans and tourists who have visited the country and tour operators indicate that this is the main advantage of the Libyan tourism industry. They argue that the GPC and GBTTI should use it as an attraction factor to promote the

country abroad. Therefore, tourists leave with a good impression regarding their personal safety and security in the country.

> *It is very safe; once a tourist left his bag on the bus and the bus was open. He was very worried, but we told him Libya is safe and when we returned his bag was still there where he had left it; this safe atmosphere does not exist in other destinations.*
>
> (Resident5)

> *It's very safe; Libya is the safest country in the region. It's worth remembering that this is the only place in the whole region that has not had any bombs. It is not paradise, but Libyans are not extremists.*
>
> (TourOp1)

> *Libya is in a good position now; in fact it is in a better position than its neighbours. We hear of explosions in many places in Egypt, Morocco and Tunisia, but Libya is still safe and removed from terrorist attacks. I'll tell you something: once a Swiss woman forgot her digital camera in the hotel, so we contacted the hotel and they had sent it before she departed from the airport. She was very happy and she could not believe how honest everyone was.*
>
> (TourOp4)

Tourists are safe; no one has been robbed or killed and tourists are surprised about that' (Resident6); *'This is what makes Libya unique; it is 100% safe compared with other destinations* (Resident7).

7.3.4.2 Police Tourism Management

Chapter six demonstrated that potential British tourists are concerned about that welcome of local people and their own personal safety and security, these being critical factors in tourism destination selection for them. In Libya, all tourists, and particularly those who come through tour operators, are escorted by a tourism policeman. The study found deep disagreement between tour operators and the Tourism Police Department. Clearly, tour operators believe tourist safety and security is of the utmost importance, but it should be effective; they describe tourist escorts thus:

> *I am not sure if we are allowed to talk about the security escorts: we are all Libyan and no one wants to harm his country. But their approach does not work and affects tourism negatively. They have an old-fashioned approach which does not work with today's tourism. It is not cost effective and has negative results.*
>
> (TourOp2)

> *Tourism security escorts do not have the required level and they do not serve their purposes. Tourists can be made to feel secure in other effective ways rather than through the methods used, which cost us a lot. These escorts represent the government and if we do not operate to their liking, we are in trouble. Very often their decisions depend on their mood: they delay the group or change the routes for unacceptable reasons. They lack flexibility and responsibility. I do not think they are suitably qualified and they misunderstand their mission.*
>
> (TourOp7)

> *I think the role of security tourism should be in the tourism locations, sustaining archaeology and preserving the ruins as well as checking the hotels. The Tourism Ministry must develop its security escorts and offer them courses in foreign languages.*
>
> (TourOp2)

> *The tourism security escorts should stay in the attractions rather than staying and accompanying the tourists everywhere else. We experience a hard attitude from the tourism security escorts; once the security escorts tried to train the tourists on how to use a gun, shooting into the sky.*
>
> (TourOp6)

> *Having the tourism police in the group means the group is safe, but this process needs coordination. The tourists are not scared by the presence of the tourism police, but they are a little worried and have started asking if this is a dangerous destination.*
>
> (Resident5)

When some tourists were asked how they felt about the tourism police escorts, none of them complained, asserting that the tourism security escorts were friendly and helpful: „*The tourism security escorts are fine, but they vary. Some of them they take an interest in the group, others do not, but there is no trouble between us'* (Tourist6). The researcher went to see the tourism police escorts and met the head of the department. At the beginning he welcomed the researcher and encouraged him to conduct scientific

research about how Libya can be a competitive tourism destination, but at the end of the interview he rejected the criticisms directed at his staff. He suggested referring any accused policemen to the Investigation Committee, where action would be taken against policemen doing anything wrong. However, he added that if the tour operators did not complain formally, it was assumed that they were happy and that the work was going fine.

7.3.4.3 Tourism information sources

Tourists seek information about particular destinations both before and during their visits and it is expected that they will visit a specific destination with some prior knowledge about what they are going to see and experience. Information availability in the UK market has already been discussed in Chapter Six. This chapter, however, looks at information availability within the destination. Information about Libya"s tourism attractions is very limited, in addition to the absence of any destination promotions. However, group tourists have another source of information, namely the tour leaders and guides; „*We have obtained information about Libya from the tour operator and we also used the internet to get information, which was easy*" (Tourist1); „*Yes it is a little difficult; some books we have about Libya are very old. I have books from before 1969, and I also have a Footprint Libya Handbook which is a very good book*" (Tourist3); „*Once we arrived here we were in the hands of the tour operator, who provided the information. Materials such as tour maps are no good and could be better*" (Tourist6).

> *They do not have a single international information centre for tourists outside of Tripoli; there is one in Ras Jidair on the Libyan Tunisian border, but it is an empty centre. We need at least one in the Al-Madeina Al-Gadema in Tripoli for tourists to get maps, to ask questions, and to get information.* (TourOp1)

> *If you required any information or brochures from the Ministry of Tourism you will pay at least three Dinar while in Tunisia they give you many brochures for free.*
>
> (TourOp6)

7.3.4.4 Entertainment facilities

The tourist industry requires entertainment facilities for tourists to have fun and excitement in their leisure time. According to Ritchie and Crouch (2003), these entertainment facilities include cinemas, gambling machines, video games, theatres, night clubs and national parks. These may be provided within hotels or leisure centres. However, the entertainment industry in Libya is very poor not just for tourists but also for locals and most hotels do not have any entertainment facilities except for TVs or occasionally the Internet. However, an increasing number of gymnasia have opened recently. „*There is a lack of entertainment, leisure facilities and national parks*" (Resident4); „*the entertainment facilities are rare and basic; the government should establish quality entertainment centres with an international image, such as Dreamland in Egypt. The government should also invest in such facilities*" (Resident8). „*The rooms are equipped with TV, telephone and a mini fridge; there is also a swimming pool in the summer, as well as a gym and fitness centre*" (Hotel4); „*As we are a transit hotel, we offer good accommodation and good food, which is all the tourists want*" (Hotel8).

7.3.4.5 Shopping centres

In the 1980s there were no shops in Libya, just state markets and associations. In the 1990s, Libya was under UN sanctions and it was difficult to export and import goods. In the late 1990s and the beginning of the new millennium, however, massive shops were

opened across the country which were mostly not planned and not organised. There are a few small supermarkets and traditional markets, such as the old city market (Souk) in Tripoli (see Figure 7.16) but public markets are chaotic and full of Chinese products. However, tourists can shop without being hassled or asked for money.

Figure 7.16: Old city market-Tripoli

„*It's very different. We have supermarkets like Tesco, and shopping centres where you can buy everything. In the souk you go from shop to shop and sometimes you do not get what you want*" (Tourist3); „*The souk in the medina is good; it has a wide variety of things which are interesting for tourists*" (Tourist6); „*The shops are cheap but not well-organised or well-structured and there are no shopping centres*" (Resident7). In this regard Resident (5) pointed out that the advantage of Libya"s markets is that there is no hassle or different prices for tourists, the tourists are free and enjoy shopping. He added that the tourists generally want to find local products and memorable gifts.

7.4 Comparative advantage

The comparative advantage consists of the core tourism resources, these being the natural resources, the heritage, culture and created resources. Although Libya has the potential for many different types of tourism, tourists tend to enjoy two main types of tourism, namely the desert and the Greek and Roman antiquities:

> *I think there are two basic reasons why people come here: one is for the antiquities while the other is for the landscape in the desert. They do not come to lie on the beach and swim and I cannot see that will happen. Certainly, the Libyan attitude does not make that likely. I do not think that will happen for a long time. People do not come here for the shopping; they may find things that are nice, but it is not a strong reason to come here. Basically, the things that could be used to promote Libya are the desert landscape and the antiquities.*
>
> (Tourist6)

7.4.1 Natural resources

Libya has an agreeable climate and a variety of unique natural resources, such as the relatively clean sea, sandy beaches, huge desert, green mountains, as well as stunning oases and lakes. In fact, the natural resources can be divided into three main categories: the climate, the landscape and the beaches: „*Libya is a virgin tourism destination with enormous potential tourist attractions that make it unique. It has about 1,900 km of coastline and 1,000 km of desert*" (Resident9).

> *Currently, we have two important components in Libyan tourism: the historical heritage (ruins) and beautiful natural phenomena. In fact, the natural phenomena fall into two categories: the desert (which is already being exploited) and the coast/beaches which are suitable for leisure tourism but have not yet been employed in the tourism market yet.*
>
> (TourOp1)

7.4.1.1 The climate

Libya is cold in winter, warm in spring and autumn and hot in summer. Western tourists avoid the summer season because it is too hot for them and only suitable for sea

and beach activities which have not been developed yet for tourism purposes in Libya. „*The spring is certainly the best time - between March and the middle of May - because the weather is not too hot and there are better flowers and birds to see as well as other things'* (Tourist6); „*The climate has been fantastic; it has been, very warm, very dry and therefore is a good climate for visiting ancient sites, where we have to walk around the whole day. Later on it will be terribly hot*" (Tourist5); *'The weather for us it is very hot. Yesterday we were in the desert in Gurza and it was very hot*" (Tourist3).

7.4.1.2 Natural landscapes

Libya has wonderful landscapes, particularly in the eastern region, with the Green Mountain and Susa. It also has amazing desert and oases; „*Oh, we have been to the Green Mountain (Jabel Al-Akthaer) and it has extremely beautiful landscape*" (Tourist3);

> *We have a huge desert; for four days' driving you cannot see any electricity poles or buildings as you are in a real desert with huge mountains of sand. In addition, the long beaches by the sea have not been exploited so far.*
>
> (TourOp7)

'There are definite adventure opportunities, such activities as sand skiing and travelling through the desert would be terrific; that would be a sort of adventure" (Tourist4); „*There are some interesting lakes in the desert which the locals do not know about. The coastline is also impressive: they say the sand is gold and not sand*" (Resident4).

7.4.1.3 Tourism Beaches

Libya is a North African country bordered in the north by the Mediterranean; the sea is warm in summer and has clear, pure water (see Figure 7.17) and smooth sands. Up to

2009, the beaches had not been considered for tourism. Rather, they are used by locals without any organisation or control. The government had neglected their condition (see Figures 7.18, 7.19, 7.20 and 7.21) and has not even thought of using them as a source of income. In 2008 and 2009, however, the GPC did sign a number of contracts to establish modern resorts along the coast.

Figure 7.17: The Mediterranean - Tajora

Figure 7.18: Gurgarsh Beach

Figure 7.19: Tripoli's Thursday market

Figure 7. 20: Tajoura Beach

Figure 7. 21: Tajoura's local sheds

The Mediterranean on its own is enough for Libya to be a tourism destination; Libya can exploit its long and beautiful sandy beaches as well as the stunning weather in the summer.

(Hotel5)

We have the best beaches in the Mediterranean. You will not find beaches like ours anywhere else; some of these beaches are virgin, for

> *example in Musrath and Tawirgah nobody has touched the beaches for years. Our beaches could attract up to 10 million tourists per season.*
> (TourOp1)

> *Libya possesses stunning beaches, particularly in the eastern areas, and if resorts are established in that area, they would be very competitive.*
> (Hotel4)

> *The beaches are very poor and dirty: the sea is clean and the beaches are dirty. This is due to a lack of awareness by the residents, combined with a dearth of modern equipment for cleaning the beaches.*
> (Resident4)

> *Some beaches are virgin and pleasant. Unfortunately some beaches are now are polluted, like those 15 to 20 km west of Benghazi which are polluted because of sewage.*
> (Resident8)

> *Most tourists go to Tunisia for the sea, whereas in Libya no one comes for the sea: the government ignores the long stunning beach.*
> (Hotel4)

Some tourists question why Libya does not use these beautiful beaches to attract tourists. However, other tourists consider that Libya could develop its beaches by focusing on the quality targeting of a specific segment of tourists rather than mass tourism, which will have a negative influence on the local culture and increase the environment risks.

> *You should use those beautiful beaches; in Turkey they use the beaches and have big hotels and make a lot of money. But you may have a different attitude. Your beaches are so clean and if your beaches were in Europe they would be full of people.*
> (Tourist3)

> *It would be a shame if Libya became a beach holiday resort with a lot of discos. It would be preferable to go for high level quality rather than mass tourism.*
> (Tourist4)

7.4.2 Heritage resources

Heritage is a wide concept involving many things and sometimes it is difficult to distinguish between the heritage and cultural factors. Libya‟s heritage can be classified into historical sites and ancient cities as well as local festivals and events. The following section investigates the care and preservation of sites as well as the protection of the heritage.

7.4.2.1 Historical sites and ancient cities

Libya has the best preserved Greek and Roman historical sites on both its eastern and western borders: Sabratha (Figure 7.22) and Leptis Magna (Figure 7.23) are Roman sites in the western region, while Gadamas (Figure 7.24) is an Islamic ancient city located close to the Algerian borders, and Cyrene, Aploiona and Tolimita are based in the Green Mountain in the eastern region. However, there are a number of sites and old cites spread across the country, such Ghat, Gurza, Nalut, and Gaser Alhaj (Figure 7.25), which tourists are also interested in visiting. The study has revealed that these valuable sites are not well maintained or adequately protected. According to the British tourists, the Libyan antiquities are impressive and wonderful sites and are among the best in the world. In fact, Libya has five sites described on the UNESCO World Heritage list: Leptis Magna, Subratha, Cyrene, the old city of Gadamas and Acacus.

Figure 7. 22: Sabratha antiquity

Figure 7. 23: Leptis Magna antiquity

Figure 7. 24: Gadamas Old city

Figure 7. 25: Gaser Alhaj (Barley and wheat stores)

Currently, there are two important elements in Libyan tourism: the historical heritage (ruins) and the natural features. As regards the ruins, Libya is considered to be one of the richest countries worldwide for its historical heritage.

(TourOp1)

> *Libya has a stretch of about 150 km with ruins of early civilisations. Acacus possesses the remains of a civilisation from 12,000 to 3,000 BC; there is little information about it. Some studies have indicated that the Nile civilisation came from Libya after the rivers dried up and there was no rain; a number of excavations and paintings support this opinion. One archaeological professor believes that fire was discovered for the first time somewhere in Libya, close to Acacus Mountains. Libya is a virgin and untouched country.*
>
> (Resident9)

> *In the eastern region there are some historical cities which are thousands of years old, like Susa and Shahat. Shahat spreads for about 20 km and has a theatre; it needs little attention and maintenance. Morgues Valley is also located between Susa and Sar Alhilah. One of Jesus' disciples came here and built his temple; it is a very important tourist location. There is also a big graveyard from the Second World War in Tubruq and many families from Europe visit the graves of their relatives who were killed in the Second World War here.*
>
> (Resident8)

> *I have just finished my visit to Libya and I can honestly say I have learned a great deal about the ancient world antiquities; I have been to, Tokra, Tholmitaha, Cyrene, Leptis Magna and Sabratha. I never told you what a beautiful place the Villa Celen is. Oh, it is beautiful and it is beside the sea, and the mosaics and frescoes are wonderful!*
>
> (Tourist3)

'The sites themselves are wonderful and the museums are first-rate. What they have in them is extraordinary. They are real treasures. Regrettably, the museums do not have good photographs of the objects in the museums or guide books" (Tourist4); „*The heritage sites are very impressive because they are so well preserved*" (Tourist6).

7.4.2.2 Local festivals and events

Traditions vary in Libya; for instance the eastern areas have different songs, dances and weddings from the western and northern areas. This gives Libya a rich diversity of local folklore, with different traditional dresses and decoration. However, there are some international festivals, such those of Gadamas, Ghat and Drij and the Hun festival,

where tourists can enjoy and experience other cultures (see Figures 7. 26 and 7.27) and traditional Libyan folklore.

Figure 7. 26: Cabao traditional festival

Source: www.images.google.co.uk (2009)

Figure 7. 27: Tripoli traditional festival

Source: www.images.google.co.uk (2009)

„*There are festivals such Gath and Gadamas which take place in the tourist season and some tourist groups come for this purpose*" (Resident5); „*When we arrived in Tripoli, there was a festival for the Prophet Mohamed*" (Tourist2); „*the restaurant today there was a group of local musicians in traditional dress playing traditional music; this is really the only kind of local cultural activity we have seen. And I see no point in inventing it if it does not exist*" (Tourist6).

> *At lunchtime in the restaurant today there was a group of local musicians in traditional dress playing traditional music. That is really the only kind of local cultural activity we have seen. And I see no point pretending that something exists if it does not.*
>
> (Tourist6)

> *Festivals and events are mostly are not well organised; for example, the Gadamas festival last year was poor because Tawariq refused to participate.*
>
> (Resident9)

> *We put on some cultural events last year, but we have stopped them due to the extensive bureaucracy and intervention of the local security authorities. Last Ramadan I sent letters to all the security authorities to obtain authorisation to conduct special events in Ramadan; they even refused to accept the letter or make comments about it.*
>
> (Hotel1)

Libya is a conservative Islamic country and therefore eastern dances with short costumes as are found in Egypt and Lebanon are not allowed. Event organisers have to seek approval from the Interior Security Department to ensure that an event does not harm local culture or traditions.

7.4.2.4 The Maintenance and Protection of Historical Sites and Antiquities

The Antiquities" Authority is responsible for the maintenance and protection of antiquities and monuments, while the Tourism Police Department is responsible for protecting the tourists and making sure that nobody plunders the antiquities. Surprisingly, the study explored that the Antiquities" Authority is not part of the GBTTI authority nor constitutes one of their departments. The Antiquities" Authority is directly answerable to the GPC. This structure reduces the degree of coordination and the achievement of tourism objectives. The best preserved sites remain neglected and unprotected with no maintenance. One non-British tourist stated that the Libyans appeared to be leasing the country. His meaning was that Libyans and the government are unaware of the value of their heritage, natural resources, historical sites and environment (GBT2).

> *Libya owes more to ruins than other tourist destinations. For example, a big part of the Leptis Magna city is still underground and undiscovered; this is the same with Sabratha and the eastern and southern regions….Leptis Magna needs a lot of work, excavation, removing of sand and rebuilding.*
>
> (Resident7)

> *The sites are neglected; we have complete historical sites that are neglected. I wish you could come and see the condition of the sites; it is a shame and embarrassing.*
>
> (Resident8)

> *Some tourists come to the country for the meteors; a lot of Libyan antiquities have been stolen, particularly by tourists who come with four-wheel drive vehicles. Additionally, many important paintings in the desert have disappeared.*
>
> (Resident9)

> *Once I met a group of tourists who were looking for a church built by the sovereign military order of Malta, but the church now is just a mound of stones surrounded by rubbish.*
>
> (Hotel8)

> *I don't think the Antiquity authority spends any money to rebuild or maintain the archaeological sites in Leptis Magana, Sabrath or Shahat. There are only foreign universities and researchers who work for specific purposes and short periods….The Ministry of Tourism has insufficient money to develop the tourism sector. For instance, the second and third floor of the Tripoli Museum is now closed due to the lack of financial resources.*
>
> *(TourOp3)*

„*The antiquities are exposed to environmental factors and there is no routine maintenance in place; additionally, people do not understand their value*" (Resident2). The maintenance and protection of antiquities is a significant issue; this problem should be addressed with a developed plan to conduct regular maintenance and make sure all the antiquities and monuments are safe and well protected. A significant number of interviewees indicated that Libyan monuments and treasures continue to be stolen and then sold to foreigners. Figures 7.28, 7.29 and 7.30 provide evidence of neglect; Figure 7.31 is the Jewish manuscript, the old Bible and is an original hand-written text on deer leather; the researcher met a man from another Arabic country who deals in stolen

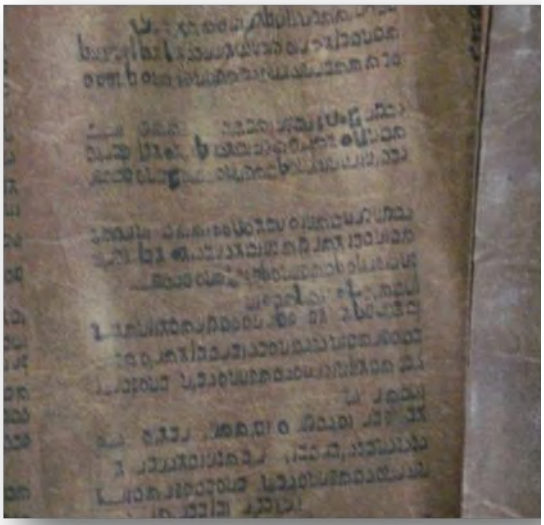
monuments and treasures in Libya and who showed him this valuable manuscript and some other remains.

Figure 7. 28: Monuments with missing heads in Leptis Magna

Figure 7. 29: Broken gate at antiquity of Sabratha

Figure 7. 30: Missing Treasure

Figure 7.31:Missing Historical Manuscript



The researcher asked the Head of the Tourism Police Department if he was responsible for controlling and protecting the antiquities and tourism sites, including the security of the buildings and the perimeter fencing, to which he replied:

> *This is not part of your study, and you will not benefit from my answer. However, I will tell you there is an Antiquities' Authority responsible for searching for antiquities and archaeological digs. This is also responsible for registering, controlling and protecting the archaeological remains. We invite the Security Tourism Police Officer to sites that have valuable artefacts. I do not know how these questions relate to your study. This discussion is not part of your study, this is a journalistic investigation and you entered my office as a researcher not as an investigator.*
>
> (GBT2)

The reader can see that the protection of antiquities is a sensitive issue and is not universally acknowledged by Libyan tourism stakeholders; these include the government, the GBTTI, the Tourism Police Department, the Antiquities" Authority and the local communities. This study therefore calls for all the tourism stakeholders to intervene and establish an urgent action plan to protect antiquities, monuments and artefacts of historical value; this would also be a valuable area for further research.

7.4.3 Culture resources

Tourism means exporting culture to others (Hotel8). However, this study attempts to address Libyan culture through the concept of tourism, and hence, this analysis focuses on factors that may have an influence on tourists, such as religion, tradition, dress, food and the consumption of alcohol in an Islamic country.

> *When tourists come to Libya, they find that the furniture and equipment are of a western style - the bed, TV, plate, knives and forks, everything. This seems to mean we do not have a culture, but this is not true; tourists do not like to see their culture in other countries and are seeking something different. For example, when we conduct special folklore festivals, we can see that the tourists are very happy and enjoy it. Therefore, it is necessary to connect culture with the tourism marketing.*

> *Up to now, we have not been marketing our culture because of the absence of an awareness of tourism. I hope that all the hotel staff, even the waiters, wearing cultural clothes to reflect our culture to others.*
> (Hotel8)

After September 11th 2001, many attempts were made to connect terrorism with Islam (Silas, 2001), with the assumption that there is a conflict between the main religions. The media in Western countries have negatively affected the image of Islam, placing suspicion in the minds of tourists as regards Islamic countries. The study investigated this issue to find out if the Islamic religion poses any difficulties for tourism. In fact, the study shows that Islam invites Muslims to get know others and to have a good relationship with them, even if they are not Muslim. However, in the Quran, some of the rules of Islam are very strict and Libyans are very tied to the mosques (Figure 7.32).

Figure 7. 32: Gadamas' Mosque

> *Our religion (Islam) encourages people to welcome and get to know each other. In my tour programme, I talked to the group about Gurji music and showed them how to pray and what we say. I also pointed out that the ladies have to wear scarves and long skirts or trousers. Why do we always think that tourists will affect our culture? They are also exposed to the influence of our culture. I know a Libyan who married a*

> *tourist and an Austrian tourist became a Muslim when he was converted by a tour leader in Zaliah. A Slovenian tourist asked me to arrange accommodation for him so that he could study the Arabic language here in Gadamas.*
>
> (Resident9)

> *There is no conflict between the Islamic religion and tourism. The tourists clearly respect the Islamic religion; on Fridays when we take them to the old city of Gadamas, they do not mind staying on their own during prayer time. Moreover, during Ramadan, the tourists do not eat or drink in front of us.*
>
> (Resident5)

> *The tourists sometimes seek things which are incompatible with our culture and religion; personally, I would not open a bar or a night club in the hotel, nor allow the drinking of alcohol in the hotel. We offer clean and organised tourism, with respect for our culture and identity.*
>
> (Hotel1)

> *The tourists respect your values, cultural heritage and religion. Many people look at the Egyptian and Tunisian experiments and they say that if we open up our country to tourism, it will be spoiled and go wrong. This is not true. Tourists always ask us what they should do and what they should not do. Because we have long coastal beaches, we could make a resort for tourists where they could relax and drink. We need to understand every type of tourism; we cannot work according to old-fashioned views.*
>
> (TourOp1)

Resident1 suggested that: as regards culture and religious issues, there are big differences between the local culture and the tourists‟ culture. Therefore, to avoid any clash between cultures, the tourist developer must take our religion and culture in account when developing the tourism industry.

Alcohol is a major issue in Libya and strict Islamic codes prevent alcohol consumption. Libya is a dry country and tourists often informed prior to visiting Libya that alcohol is not allowed in the country. Although most of the British tourists drink alcohol, some of them have indicated that they can cope without this, particularly for short holidays.

> *I think the more educated British people want to visit the country; the less educated are not interested, because there is no alcohol, and they don't have an interest in Greek and Roman remains. They like beaches where they can swim and maybe going diving, and these do not exist in Libya.*
>
> (Tourist1)

> *Some people in Britain will not go to Libya because there is no alcohol there. But when people come, I do not think it's a problem. For those who have already decided to come it is not a problem.*
>
> (Tourist6)

> *We are told before coming that there is no alcohol, so it was no surprise at all, and when we came we did not expect any at all. However, for me, as I like beer, you can always have non-alcoholic beer, and some are a reasonable and good alternative. People come here for the ancient Greek and Roman remains, whether there is beer or alcohol or not. People like the antique remains and will understand that alcohol is not allowed in this country. English people do not anyway like to see other English people behaving badly.*
>
> (Tourist5)

This study has revealed a critical argument in the Libyan community about alcohol as well as the establishing of nightclubs in the country and there are two views on this: one view is that alcohol and nightclubs should not be allowed in the country. From this point of view, Libya is seen as an Islamic community which must differentiate itself from its competitors. People with this view suggest that Libya should target a segment of the international tourist market that minimises the negative tourism impact on local cultural traditions and religion, rather than trying to appeal to the whole market. In other words, Libya should focus on the quality of the tourists instead of the quantity and mass tourism.

> *We discussed this issue with Dr Rajeb Abo-Dabos; he personally believes that Libya does not need tourism as it will attract foreign culture. Moreover, in one of tourist seasons, the Egyptian Tourism Ministry advised the Secretary of the General Board of Tourism to open up the country to alcohol and nightclubs in order to establish it as a tourism destination in the same way as Egypt. The Secretary told him*

> *that if we wanted to do that, it would be easy. But we have to respect our cultural traditions and religion: we have to keep and protect them. We need to have tourists in this country without damaging our culture, and this is our uniqueness.*
>
> (Resident9)

> *Whatever benefits tourism can give us, we must never allow alcohol; it is not allowed by Allah. We have to let tourists know that certain things are not acceptable in Libya because of the religion and culture, and inform them about this. Then they will respect such matters when they come to Libya; they will understand and appreciate the culture and enjoy something different.*
>
> (Resident2)

> *Alcohol is not an attractive aspect of tourism; it will cause a lot of problems. Our religion and culture prevent us from allowing the consumption of alcohol, and we have to protect our religion and culture. British tourists are friendly and polite, and we very much welcome them. But the attire and habits of some tourists are not accepted by our culture, particularly over Ramadan.*
>
> (Resident6)

The view of other Libyans is one where they would like to see an increase in the number of tourists to the country, and where alcohol should be allowed for tourists, but in particular designated places such as tourist resorts and five star hotels; this could be integrated with an effective control system to insure that Libyan youths do not have access to alcohol.

> *This is one of main dilemmas facing the tourism industry today; if you want to create tourism, this is an inevitable issue with a significance for local residents. And when tourists arrive in the country and ask for something, you cannot say you are sorry and you do not have it. Yes, it is possible to provide alcohol for tourists, but only according to the law to ensure it is available for tourists and not to the general population….. Sure, the tourists can be relaxed and find what they want; tourism is leisure. If a tourist comes and asks for alcohol and cannot find it, or asks for a disco and cannot find one, he will not come again.*
>
> (Resident4)

„*Perhaps some tourists do not come to Libya because there is no alcohol as a result of our legislation. However, we could offer alcohol to tourists in particular places*"

(Hotel3). „*I think the government should allow alcohol to be drunk, but under strict regulations*" (Resident7).

> *This subject is complex. My personal opinion is that alcohol, if it is allowed, should be available in special places for tourists, not in public locations. Tourism should not be open and must be regulated and well managed. The tourists should also be informed about this and respect the local culture.*
>
> (Resident8)

A hotel manger argues that: „*To encourage mass tourism in the country, it is necessary to offer alcohol, but I personally will not work in a place that serves alcohol*" (Hotel4). We can therefore conclude that Libyans are keen to protect their religion and cultural traditions, and therefore, the GPC and the GBTTI should consider this issue and involve all stakeholders" particularly local communities to make such a critical decision.

7.4.4 Created resources

Libya is a new tourism destination, and therefore has little experience in its development; none of the Libyan tourism stakeholders indicated that any created resources had been developed for tourism activities apart from the Great Man-Made River project, even though created resources can attract foreign tourists and would make a holiday in Libya more interesting.

7.5 Local communities

This section focuses on the relationship between the tourism industry and local Libyan communities, exploring how locals perceive the tourism industry. This section also considers the language of communication between locals and tourists. Additionally, it looks at how British tourists find Libyans and whether they appear similar or different

to other Arab communities. Finally, it investigates the degree to which local communities are involved in decision-making in relation to the development of tourism.

7.5.1 Positive tourism impacts upon local communities

Tourism is clearly an industry that some countries rely heavily upon tourism as a major source of income. Hence, it is important for improving economic and community welfare. In Tunisia, Jordan and Malta, for example, tourism plays a major role in generating hard currency. It also facilitates an exchange of cultures, where locals and tourists learn about each other (Resident4). Tourism provides an awareness of specific countries or nations and is a vital source of employment (Resident9). Furthermore, it is a tool for enhancing destination image (TourOp1), it increases the knowledge of people and creates jobs for young people (Resident6).

> *Tourism in the 20th Century and for the 21st Century has had and will continue to be a main economic route for most of the world's countries, even those which are oil producers. It will also create jobs for the young. We have to reflect a good image about ourselves, as Muslim and Arab, tourism can provide us with the chance to defend our causes, such as that of Palestine. Local communities can also benefit by providing more work, selling handicrafts and providing services to tourists such cafes and transportation.*
>
> (Resident8)

> *I am a great supporter of eco-tourism, which uses tourism as a means of developing local communities. Let me give you an example: if you looked at Gadamas, it is a very attractive destination in Libya; it has an oasis and is located in the Sahara, 600 kilometres south of Tripoli. The oasis is a UNESCO World Heritage Site. Ten years ago there was only one guide in Gadamas and only one restaurant and hotel. Now we have about 8 hotels in Gadamas and six or seven restaurants; we also have about 10 guides, and many houses in the ancient oasis are being used for short stays. Therefore, nowadays, at least 50 to 60 families benefit from tourism in Gadamas. If you add to this some of the other people who have moved from other areas to work there, you can see that the local communities are gaining from tourism. Let me give you another example: In Leptis Magna in 1996, there was only one English speaking*

> *guide and only one Italian speaking guide, as well as an Italian speaking guide who was working in the Antiquities Department. Now, in Al-Komis, we have about 28 English speaking guides and they are also from the same area, and we have about 20 Italian speaking guides from the area. Additionally, there are about 5 or 6 restaurant chains, we have 2 or 3 hotels, so all the communities are gaining from tourism.*
>
> (TourOp1)

> *The locals benefit in different ways: tourists spend money in the hotels, shops, cafés, on souvenirs, on buses, on tour guide, and on other services that are required. In this way, some local people will benefit directly, while others benefit indirectly.*
>
> (Resident5)

The perceptions of locals of foreign tourists are significant because it reflects the nature of their relationship; they can also predict problems that may occur in the future. Most Libyans see tourists for their economic value but the local culture, religion and traditions must also be respected and protected.

„*I have not seen any disadvantages from tourism*" (Resident5). „*British tourists are amiable and polite, and they are very welcome. However, the attire of some tourists is not acceptable to our culture, particularly during Ramadan*" (Resident 9). *'We have not seen any disadvantages from tourists, and vice versa; we benefit from tourism, for example in how to look after the environment and dispose of the rubbish*" (TourOp7).

7.5.2 Negative tourism impacts upon local communities

Tourism is a double-edged sword; if a destination does not manage and control it well, then it may harm and destroy that destination; hence the potential negative impacts must be considered, particularly in the planning stages.

> *Tourism is very important, particularly for developing countries. In Libya, tourism is a neglected sector, and has a negative impact on Islamic destinations, where tourists often look for alcohol and exciting nights. I think this could be a big problem for the tourism industry.*
>
> (Resident7)

> *In the first place, the tourists would affect the local people by bringing in a new culture. For instance, if you go to the Dar-Tileal resort in Sabrath, you can see women swimming in bikinis. This is a new phenomenon in our culture and women should be prevented from doing this in front of men. However, with tourism we have to cope with it and accept it.*
>
> (TourOp2)

> *Maybe the direct disadvantages of tourists are related to particular youths and single workers who marry tourists and go overseas to Europe looking for better life.*
>
> (TourOp7)

> *Tourists respect your values, cultural heritage and religion; many people look at the Egyptian and Tunisian experts, and they say if we open our country to tourism, it will be spoiled and go wrong. This is wrong and not true. Tourists always ask what to do and what not to do.*
>
> (TourOp1)

Obviously tourism has positive and negative impacts upon local communities. Hence, destination management becomes crucial, in order to maximise the benefits of tourism and reduce the negative impacts, moreover, to ensure that local culture, traditions are protected.

7.5.3 Are Libyans different?

Tourists are the most reliable source of data to answer this question: on a visit to the country, they will realise that Libyans are different from the other nations in Libya"s competitor destinations; Libyans are spontaneous, honest and friendly, as tourists have repeatedly stated:

> *Libyans are different from Jordanians, Egyptians and Moroccans. I think they are similar but they seem different and friendlier.*
>
> (Tourist4)

> *They are always friendly; they have always been very hospitable, very welcoming and are keen to practice their English, even if they have almost none. They are extremely friendly without exception.*
>
> (Tourist6)

> *The people demand less money and the tourists are not so prominent here. People do not hassle the tourists. We know the people are very hospitable to visitors, and everybody receives what they want; we have marvellous tour guides, and everybody is so friendly and pleasant. We have what we want. I can say that the local people are very friendly, pleasant, hospitable and helpful.*
>
> (Tourist2)

> *I have been to the Souk now and everybody wanted to help me because I have a walking stick, and some people helped me up the steps; that kind of behaviour does not happen a lot in many other countries. The people are polite and pleasant. ... And I want to say that I have seen many new buildings and I know that your country is developing. The people are very kindly; I bought something from the Souk and no one tried to cheat me. Libya has honest, pleasant and wonderful people.*
>
> (Tourist3)

> *Libyan people are hospitable and generous. A week ago I met a Canadian tourist in the market who wanted to buy something, but the salesman was not in the shop, so I let him take the goods and go. When the shop assistant came, I told him what I had done and I paid the costs instead of the tourist; this behaviour does not exist in Egypt and Tunisia.*
>
> (Resident7)

TourOp6 raised the issue of the increasing phenomenon of begging for money. It was also observed that some people were asking tourists for money. TourOp6 considered that the government should take legal action against such people and he added that some of them were not Libyans, but were wearing traditional Libyan dresses.

> *Once I saw some women begging and asking for money, I thought they were Libyans speaking in slang, but later I realised they were Egyptians. This is not good and is bad for the image of the country.*
>
> (Resident7)

> *A week ago I was in the market and an African person stole 50 Euros from a tourist. The people who saw the incident raised about 50 Euros and gave it to him; the tourist could not believe what was happening.*

> *Libyans do not hassle or annoy tourists; no one asks for tips or money and this is one of the positive images we have of Libya.*
>
> (TourOp3)

7.5.4 Language communication

The ability to speak foreign languages is essential in the tourism industry, especially for those who are in direct contact with tourists. As will be mentioned in the chapter, because of a shortage of tourism and hospitality colleges in the country as well as the weak output of the education system, foreign languages are one of the main obstacles facing the tourism industry in Libya. The main language in Libya is Arabic; there are some minority languages, such Barbarian, Tawariq and Tabo. However, an increasing number of Libyans speak English as a second language as discussed earlier in chapter 5. This study found that although tourists experienced difficulties communicating with the locals, with the tour guides this was much easier. When tourists were asked if they face difficulties communicating with locals, they described varying levels of difficulty:

> *I do not speak enough Arabic, but for a group it is not essential because we are always with a Libyan tour guide. In the hotels, the knowledge of English is variable: sometimes it is OK, but sometimes it is poor.*
>
> (Tourist6)

> *More people here speak English than I expected, because I was told that not many people speak English. There are no difficulties; I suppose in every hotel there are some people who speak English well, and that's fine, but sometimes you need somebody who is not a key person and he may not speak English, yet this is not a problem. When you want something, you just explain what it is to someone who speaks English.*
>
> (Tourist5)

> *Well, we have managed to communicate individually, when no English was spoken and we had no Arabic; it works somehow.*
>
> (Tourist4)

This issue is also discussed with tour operators, hotel managers and local residents who highlighted foreign languages as essential for developing Libya"s tourism industry.

> *Language is a big problem: for example, I have not completed my studies, and some tour leaders do not speak foreign languages. Consequently, when we take the tourists on long journeys, we need to communicate with them and the tourists want to know everything. For this reason, the tourism authority must conduct training courses in languages at least to learn the basics of welcoming and greeting.*
>
> (Resident5)

> *Local tour guides must be supported and encouraged, instead of using foreign tour guides, because local tour guides know about our country and its culture and beliefs. Last year for the first time people graduated from the Sabratha Higher Institute as tour guides, but the quality of the graduates was low as regards the language and historical information. Exceptions to this were the courses managed by the General Board of Tourism and Traditional Industry.*
>
> (Resident6)

> *We lack the languages through which we may communicate; significantly, foreign languages were cancelled from Libyan institutes for 20 years. All the governors say the services are poor; I do not know how poor they are, but when the waiter is talking to the customers, he does not know what the customer's have requested. I am not blaming the waiters and hotel staff, because the issue goes beyond them.*
>
> (Hotel2)

The head of the Tourism Police Authority requested that some of tourism police should not have foreign language skills; to this he added: „*Some of them, anyway, do not have the chance to learn foreign languages. The mission of tourism officers is the safety of tourists, not to translate or to explain about the sites; I cannot see that this is a problem* (GBT2). The answers of the government officials reflect the gap between their knowledge and the sector needs. Resident1 suggested that: „*the government should learn from developed countries and the experiences of other nations: the main factor for the tourism industry is foreign languages; the government needs to send employees abroad to learn languages and the basics of the tourism industry'*.

7.5.5 Traditional handicrafts

The handicrafts industry is mostly for the tourists; technology nowadays produces mass-market products in less time and at a lower cost. Nevertheless, handicrafts usually survive because of two main factors: the number of tourists and government support. Unfortunately, in Libya"s case, these two means of survival are running dry: the number of international arrivals is very limited, which make low demand on traditional handicrafts and there is no government support. Therefore, if the tourism situation does not improve, the handicraft industry will cease to exist. Hence, souvenir shops focus on profit and the shopkeepers do not mind if they sell local products or imported ones (see Figures 7. 33, 7.34 and 7.35, for particular types of handicrafts; in Figure 7.36 it is clear that some goods are not made in Libya, e.g. the tiger skin and some pottery).

Figure 7. 33: Traditional textiles

Figure 7. 34: Traditional potteries

Figure 7. 35: Copper industries

Figure 7. 36: Foreign products

> *We enjoyed the Madena market, but it was not easy to find things made in Libya; we actually discovered some items made in China.*
>
> (Tourist4)

> *I would like to raise the importance of handicrafts and establish commercial centres for them, because tourists want to buy handmade gifts.*
>
> (Resident4)

> *The markets and shops have everything; the advantage of Libya's markets is that there is no hassle or different prices for tourists and the tourists can be free and enjoy their shopping. However, the souvenir merchants seek a physical yield, not a cultural one, and tourists want to find local products.*
>
> (Resident5)

Resident7 emphasised that most of the goods and products are made in Egypt and it is rare to find local handicrafts in the market. This is due to a lack of support from the local industries. Another resident added that the craftsmen who make handicrafts are decreasing because there were UN sanctions on Libya. However, some people still work in this sector and should be supported and encouraged (Resident8).

> *Handicrafts are disappearing; in Gadamas, for example, there is one old lady who still sews traditional textiles.*
>
> (Resident9)

> *The handicrafts industry is not active; the government should support the industry by holding exhibitions and sponsorships, as well as buying the products to boost sales.*
>
> (Hotel2)

> *The handicraft industry is active in Morocco, for example, because it attracts large numbers of tourists who create a demand for the industry. However, in Libya the numbers of tourists remain small, and this is combined with a lack of support from the authorities.*
>
> (Hotel4)

> *There is an association for handicrafts, but if you see the handicrafts in the Souk Al Mousir, for example, you will see many foreign handicrafts made in Egypt or Tunisia. Some tourists ask why we are selling Egyptian handicrafts here in Libya.*
>
> (TourOp6)

Hotel7 claimed that there is no real consideration for the handicrafts and the government does not support this industry. In Morocco, handicrafts account for about a fifth of the total Moroccan GDP, while in Libya they do not contribute at all.

7.5.6 Local community involvement in decision making for tourism development

An important issue emerged while the researcher was investigating the relationship between local people, tour operators, hotel managers and others involved in tourism (including the GBTTI). This was that not only are tour operators and hotel managers not involved in tourism planning, but local communities are not involved either, hence they do not participate in tourism plans and the decision-making processes. The Libyan political system enables all Libyans to attend basic congresses to discuss local and national issues, including tourism policies, but practical decisions relating to tourism

and its plans are centralised and made by the GPC and GBTTI. Neither locals nor tour operators, nor even hotel managers are involved in tourism development; they also have no say in the National Tourism Development Plan (NTDP). One of the gaps in this study is that local communities have not been asked directly about their involvement and participation in tourism development. However, tour operators and hotel managers assert that have not been involved in tourism development either. This issue is discussed later in the following section under the title of destination planning and management.

7.6 Destination planning and management

7.6.1 The government's role in developing the tourism industry

The executive authority in Libya is represented in the GPC and its committees and authorities such as the GBTTI, previously known as the General People"s Committee for Tourism (the Tourism Ministry). Thus, GBTTI is responsible for managing the Libyan hospitality, tourism and traditional industries. Despite the political stability in Libya since 1969, the government structure is not stable and changes nearly every four years, moving from centralisation to decentralisation and from broad/all-encompassing GPCs (ministries) to narrow ones. This instability in the government structure has resulted in the loss of data and information, as well as in ineffective and inefficient planning coordination and poor control or management functions.

> *The GBTTI follows the policies of the GPC, and I do not think the changes have affected its ability or performance; it is still at the same level. The only change that occurred was in the name.*
>
> (GBT1)

People in power such as GBT1 consider that the government has achieved a great deal and believe that the instability in the government structure has not had any effect on the

government‟s performance. However, this is clearly not the case, because they are part of the problem. „*Government corporations, institutions and committees have not given time to the plan and what they plan is changing all the time*‟ (TourOp1).

There are also some authorities that are linked to the GBTTI, such as the Historical Cities‟ Authority, the Public Gardens‟ Authority, the Traditional Industries‟ Authority and the Tourism Police Authority. However, the Antiquities Authority is no longer part of the GBTTI and is an independent organisation reporting to the GPC (GBT1). Libyan stakeholders are unified in their view that the GPC and GBTTI are not succeeding in achieving their goals, especially from the point of view of residents and tour operators who are not happy or satisfied with the achievements of tourism. TourOp6 described the Libyan tourism sector as an orphan, focusing on the absence of the effective role of the government to support the tourism sector. Indeed, many tourism businesses have asked what the GPC and GBTTI have implemented to develop the tourism industry.

> *The government has made some progress, but it is a slow process and the country needs more hotels, resorts and transportation if things are going to better; every year is better than the previous and we hear that the government has plans…but I do not know where the problem lies.*
>
> (Resident5)

> *I question what the General People's Committee has done so far; there is nothing tangible to evaluate its achievements. The Libyan tourism sector is an orphan.*
>
> (TourOp6)

> *Nothing obvious has been done; in the media everything exists but on the ground there is nothing. The country has a lot of money but does not spend it on developing tourism sites. Here in Sabratha nothing has been changed for seven years and pieces of the ruins are being stolen.*
>
> (Resident6)

> *The government has achieved about 10% of what it should do. The tourism sector is still failing and it cannot be developed with the current*

> *approach; the situation of tourism is extremely poor. A lot is written and said about it in the media, but on the ground nothing obvious is being done and there are no tangible results.*
>
> (Resident7)

> *The tourism projects are small; the government does not appear to care about the tourism sector. The country has the basic requirements of the tourism industry at all levels, with its history, natural beauty and beaches, but less than 5% of these resources have been exploited; the government clearly has no idea how to manage tourism.*
>
> (Resident8)

> *Tourism is in its very early stages in Libya, and cannot at present compete with other countries. It takes two steps forward, then ten steps back and has not developed beyond the condition it was in ten years ago. All that we have are more complications because the government has attempted to do something, but has not succeeded and the low number of international arrivals is strong evidence of its failure.*
>
> (Resident9)

> *We hear that there are some big projects afoot, but they are very slow. After 20 years in the tourism sector, I cannot see any tangible results. Tell me what we have done in 20 years of tourism; we have developed, but there is a big difference between developments of 10% to that of 80 %.*
>
> (TourOp2)

Despite the disappointment of Libyans concerning the government"s progress in the tourism sector, they are amazed by what they hear in the media concerning this, but obviously nothing concrete is happening. Moreover, the government is incapable of making progress to develop the country or manage international events due to the lack of experience and poor management. Libya witnessed a full eclipse in 2006 and the GBTTI organised and marketed this event to attract international tourists and scientists. Below are two interesting stories from a tour operator and a tour guide relating how poor management changed the eclipse event from a success to a disaster.

> *The other competitors are better than us as regards infrastructure and services, including management. For instance, last year the Ministry of Tourism organised the eclipse event and most of the tourists cancelled their reservations. Less than 10,000 tourists came to the eclipse and it*

> *was a disaster; the buses were old, and the next day two cruises arrived at the port of Tripoli and buses could not be found for them. The organisation for the eclipse event and the management was poor. It was the first attempt at an international tourism event: there were a lot of committees, complex visa procedures and extra fees. I had marketed the eclipse two years previously (in 2005) and a few months earlier the GBTTI had asked us to pay extra fees of about €120 to €150 per tourist. This is not the way to conduct tourism. Even the tourists who did not come to attend the eclipse, felt pressured to pay the extra fees. I could not see any role for the Ministry of Tourism in the eclipse event beyond providing security gates: the tents, transportation, food and so on were provided by private tourism companies.*
>
> (TourOp2)

> *The GBTTI imposed extra fees for tourists, which worked out at about €700 per tourist and our company consequently cancelled a reservation of 400 tourists. Additionally, there were insufficient buses and tour coaches to transport tourists to the location of the event. It was a huge shame: we had big tents, lights and the internet, but no tourists. During the eclipse event, something happened to the residents and tourists and there was a kind of hysteria; one of my group stayed in bed for three days and another tour driver had stomach problem, with no real medical care.*
>
> (Resident9)

The GPC and GBTTI are responsible for supporting tourism, including the tour operators, travel agencies, hotels, resorts, souvenirs, restaurants, ancient cities and handicraft industries. There are two issues in this regard: firstly, there are clearly not enough budgets allocated for the development of tourism. Secondly, support can assume a number of aspects, not just financial ones: it requires a great deal of thought as well as experienced and enthusiastic people to carry out the work.

> *In the past, there was good support, but this year there is no real support, particularly with the financial budget for 2008. The mentality of the GPC is open and very cooperative, and I think Dr. Al-Bgidadi considers tourism to be an active and effective sector, as well as a sustainable resource representing Libya's future.*
>
> (GBT1)

The views of the tour operators, hotel managers and local residents concerning what the Government representative stated are set out below:

> *As tour operators, we cannot show any tangible achievements for tourism and we have not received any support from the tourism authority.*
>
> (TourOp7)

> *Tourism is in an introductory stage; Libya has 1,900 km of beach along the Mediterranean Sea, and the desert has not been exploited yet; nothing obvious has been achieved in tourism so far. We have heard a lot about projects along the way. In fact, the government is supposed to support the tourism sector and help the private sector develop it.*
>
> (Resident4)

> *Organising anything in Libya is fraught with difficulty; organising hotels, toilet facilities, road signs, office work or immigration. It's all the same ….the Ministry of Tourism or the Department of Tourism, or whatever. We cannot order banks to give money to tourism and we cannot ask Immigration to facilitate the procedures. As long as we cannot do this, we will not see real tourism. The main reason for this is that the tourism sector has limited powers in other sectors.*
>
> (TourOp1)

The relationship between the GPC, the GBTTI and tourism businesses is poor with no coordination; the relationship just relates to the requesting of statistics by GBTTI.

> *Our relation is like a guy who has fallen in love with a girl and her family has refused him. The tourism authority in the Al-Mregib branch is extremely unhelpful; they are very actively against us.*
>
> (Hotel1)

There is no systematic connection between the government authorities (GBT1). Hotel3 pointed out that there is no sort of cooperation between hotels and the GBTTI, except monitoring hotel cleanliness and services. „*We have a good relationship; we provide the GBTTI with information and statistics, and it's OK'* (TourOp4); Hotel4 added that „W*e provide them with monthly and annual statistics'*.

In terms of the information and tourism statistics, the researcher acquired a copy of international arrivals from 1997 to 2004 as issued by the GPC for Tourism. The report

indicated that international arrivals stood at 913,292 in 1997 and the number increased slightly to 999,343 tourists in 2004. When the official, GBT1, was asked about the number of international arrivals, he presented another report issued by the Tourism Information and Statistic Centre at GBTTI (see Appendix C), which is completely different; the new report asserted that the number of international arrivals was a mere 29,302 in 2000, and the number increased dramatically in 2006 to a record 125,480, falling the following year (in 2007) to 105,997 tourists.

When the researcher asked the manager to account for the tourists, he replied that they had obtained these statistics from the Tourism Police Authority. A week later the researcher questioned the Head of the Tourism Police Authority about these tourists, and he stated that they had obtained the statistics from tour operators. However, when the researcher seriously attempted to find another source of statistics from the Nationality and Immigration Department, they refused to meet him or to give him any information. Hence, tourism information statistics are not really available, but also unreliable. In addition, it is not expected that the GBTTI will be able to achieve its objectives or make any significant progress, when no one has an idea about how many tourists entered the county in 2007 and 2008, and what their nationalities were or the purpose of their visits.

> *As I told you, these statistics were obtained from the Tourism Police Authority and you can get the statistics of international arrivals from the immigration department…..we record the tourists that come through the tour operators and travel agencies, but we do not include independent tourists. In addition, there are other tourists who come over the borders from Egypt, Tunisia and Algeria for visits, shopping and treatment purposes, and these are unfortunately not included in our statistics.*
>
> (GBT1)

Laws and regulations relating to tourism should consider all tourists, whatever they come for, whether leisure, culture, business or other purposes. The government in Libya issued some encouraging laws for investors in the tourism sector, but the laws relating to tourists are confusing. In particular, the law about having a page translated into Arabic in tourists‟ passports as well as that of each tourist having one thousand US dollars and obtaining visas fees, this issue has been discussed earlier in destination accessibility section.

> *The laws and regulations are encouraging and suitable for investment, but some strange decisions have arisen, such as the decision to pay an extra 200 Dinar for the sun eclipse event. I question whether the country really needs tourists.*
>
> (Resident6)

> *The General Committee of Manpower has prevented us from attracting foreign workers; this is a problem because the people here have no idea about the nature of the hospitality industry, we need to recruit foreign chiefes with attractive salaries and, there is an unfair discrepancy between our employees' salaries and the Corinthia Bab African employees' salaries: there is a big gap between 10,000 US Dollars and 700 Libyan Dinar. Private enterprises can purchase whatever they want, but we cannot; we have to provide the financial controller with three different offers and mostly he select the cheapest offer and this will be reflected in the quality.*
>
> (Hotel2)

The law number 15 of the year 1981 relating to Libyan salaries and the laws that regulate recruiting foreign workers have a significant and negative impact on the tourism industry. The most important plan for tourism development is the Libyan NTDP issued in 1997. This is discussed at length in Chapter Five where a number of criticisms are directed at the NTDP. The vast majority of the tour operator‟s hotel managers have no idea about NTDP and are not involved in the new one. „*I have not heard about this plan*‟ (TourOp5); „*I did not hear about the LTMP*‟ (Hotel2).

> *There is a committee that was established to rewrite the NTDP, and we prepared a long term tourism plan, which was introduced to Mummer Al-Qudaffi and to the Libyan Congress and the General Domestic Planning Council…We have not cancelled the old version which was implemented during the period of sanctions when the circumstances were different, but now everything has changed, and we need a new one.*
>
> (GBT1)

> *My suggestion is that the GBTTI should invite at least 5 or 6 tour operator managers to put forward a plan on how to develop the tourism sector; they would be better than foreign advisers. The GBTTI should have two plans, one for the short term and one for the long term. The short term plan should concentrate on developing and rehabilitating the existing constructions, such as the Gasir Libya Hotel, which has about 400 beds and the Libyan Mediterranean Sea Hotel, which has about 200 beds. The long term plan should consider new projects and activities.*
>
> (TourOp2)

7.6.2 Tourism businesses including small and medium enterprises

There are different types of tourism businesses, the main active ones being tour operators, travel agencies, hotels, resorts, restaurants, internet cafés and transport companies. However, these tourism businesses also have different formal shapes, from joint venture companies, joint stock companies, family firms and individual business people. According to the data, however, it is notable that there are no foreign or franchising companies operating in the tourism field until the end of 2009. Libyan tourism businesses are mostly small-sized organisations relying on their existing business experience. There are business incubators and small-scale industries have been developed with the aim of supporting new ideas and small business, but their activities are not obvious as of yet. „*Tour operators are small: about 90% of tourism enterprises cannot receive more than twenty tourists per day. Tourism enterprises compete fiercely with each other in international exhibitions and are not concerned about quality*"

(Resident9); „*in fact, the government is supposed to support the tourism sector and support the private sector in developing this sector*" (Resident4).

> *The government is responsible for unreliability, because there is no respect for flight schedules and hotel reservations. Hence, the tour operators are victims and the government does not support the tour operators.*
>
> (Resident6)

The GBTTI representative asserted:

> *We encourage tourism businesses by the introduction of new laws and facilities; we confirm the procedures and facilitate the establishment of tourism projects, but we have no power to provide funding. Funding decisions ultimately depend upon the banks' policies.*
>
> (GBT1)

Despite the fact that most of tourism businesses rely upon experience, tour operators can make good progress, but in the hotels they are seriously struggling because of chronic dilemmas, such as with the quality of standards and human resource management. British Tourists expressed that „*The tour operators are excellent; we have an English tour guide besides the Libyan tour guide and he has been very good*" (Tourist1). „*The local guides who guide us around the sites are wonderful*" (Tourist2). „*The tour organisation was impeccable, even the tour guides were really excellent*" (Tourist4).

Due to poor infrastructure, the vast majority of tourism businesses are based in the capital, where the services are better. In this context, private tourism businesses have the spirit of competition more than public businesses, but quality and marketing strategies still need to be achieved in private and public businesses.

> *Tourism requires communications: faxes, the internet, telephones, so Tripoli is the best place to have a connection with the world. In addition, from 80% to 90% of tourists come to Libya through Tripoli.*
>
> (TourOp1)

> *The headquarters of the company is originally based in the south, but we can not operate there, because we are far away from the international airports, hotels and immigration offices. For this reason, it is necessary to establish a branch in the capital.*
>
> (TourOp7)

7.6.3 Human Resource Development

Human resource development (HRD) is a crucial issue in Libya‟s tourism development, and the concept of human resource development is very wide, including as it does recruitment, selection, training, motivation, leadership, working conditions and labour turnover. Therefore, this section focuses on the main issues facing employees in the Libyan tourism sector, such as employee performance, language skills, training programmes and cultural impacts in tourism.

7.6.3.1 Employee performance

This study was not designed to measure employee performance in a direct way, but it investigates in general if the workers in the Libyan tourism industry perform well and have the required silks to provide good services for tourists. It was found that Libya‟s tourism industry is run by workers with limited experience who came to the industry from different backgrounds such as history and linguistics. The country is full of doctors, engineers and economists (GPC of Manpower and Training, 2007), but tourism and hospitality graduates are very limited and in this case could not meet the job requirements; even on an educational basis they are inadequate. The study revealed that Libyans do not study tourism or hospitality for two reasons: the first of these is the education system, which does not focus on these areas of studies; secondly, tourism and hospitality have a low priority among Libyan students, due to cultural influences, and in particular, hospitality is still seen as a low grade area of work that is not accepted by

Libyans. Surprisingly, the government does not look upon human resource development seriously, although they know it is crucial. „*Listen, we are in the private sector and none of us has studied tourism*" (TourOp1); „*there is a lack of skills in the workforce because of the absence of hospitality colleges and universities in the past*" (Hotel5); „*there is a lack of qualified human resources people and this includes tour guides, taxi drivers, tour leaders and hotel receptionists*" (Resident6).

> *The majority of our employees and tour guides are qualified, but not in the field of tourism, rather they have shifted to it; we have one or two people who have graduated for a tourism school. The most important skills in our employees are language skills and experience; the tour leaders usually come with the group from the foreign tour operators. Our aim is to provide the group with a tour guide or to find one in the particular attraction which will have licensed tour guides.*
>
> (TourOp4)

> *We lack professional and qualified people who specialise in food and drink services. All the hotels in Libya have foreign chefs, otherwise… Libyan activity in the hospitality sector would not following the developments in the hospitality industry: within the country, this information is very limited. The modern concept of tourism does not yet exist in Libya; hospitality training in Libya is composed of just a few institutes from which a small number of students graduate. However, the latter do not have practical experience, and the whole process requires external training courses in developed countries.*
>
> (Hotel4)

> *We still need a lot of tour operators and tour leaders who speak the language of the tourists and take them to the attractions. Apart from this, we have a number of employees in tourism operations and finance, but it is difficult to find qualified people for tourism because it is a new industry for us.*
>
> (TourOp3)

TourOp2 raised an important issue, namely the low number of graduates from the hospitality institutes; students prefer to do administrative jobs, so avoiding frontline or operating jobs. Hotel managers have even pointed out that many graduates are not interested in this industry.

> *So far we have not any institute or university for tourism and there is one high institute for hospitality, but we do not need the graduates, or we only need a few of them. In our opinion, people who have a first degree do not like to work in the lower hierarchy of an administration as waiters, and cooks. Moreover, others prefer to work in the oil industry in the desert for high wages.*
>
> (TourOp2)

> *Although a number of students graduate from the Hospitality Institute in Musrata, there is a shortage of hospitality employees and there are vacancies in the hotels. Moreover, many students in the institutes have no real desire to study hospitality science, and their main goals are just to have a qualification or to satisfy their families.*
>
> (Hotel4)

> *The education output is very poor, and you cannot imagine how it works. There are many reasons behind this: firstly, students are not interested in studying hospitality; secondly, the community has a bad perception of this profession; thirdly, the hospitality curriculum is weak and, in addition, not all the hospitality graduates are qualified to fill the vacancies.*
>
> (Hotel2)

The study further revealed that neither the GPC of Manpower and Training, nor the GBTTI have done any market research regarding the workforce demands in the tourism and hospitality industry. It also seems to be the case that they are not aware of the challenges of the industry.

> *I know that there are a number of institutes which specialise in hospitality in Tripoli, Mosratha and Benghazi and there is also a significant number of graduates every year. However, if those graduates are not interested in working in the hospitality sector, that is another issue. Do these tour operators and hotel mangers go to the hospitality institutes and ask them for new graduates or tour operators? In tourism we do not have qualified people in the field.*
>
> (GBT1)

7.6.3.2 Training programmes

Training programmes are conducted when the current performance of employees does not meet the expected performance. Hence, training programmes are designed to

remedy this situation and increase the employee"s performance. The study revealed that there are no regular or organised training programmes and even private institutions lack tourism and hospitality courses. The GBTTI previously carried out training programmes, particularly in tourist guiding, and the successful trainee was then awarded a tourist guide licence; most of the existing tourist guides have taken part in these programmes.

> *The existing tour guides are young people who have foreign language skills, and some of them live beside the sites and have some basic background knowledge. However, a few of them have attended training programmes provided by the GBTTI, which has awarded them a licence to perform this work. Additionally, some doctors have specialised in tourism, working as a tour guides, but in general in Libya there are no qualified tour guides.*
>
> (GBT1)

> *Our tourism police officers were already police officers in other security departments, and we offered them training programmes, both internally and externally; at the moment we have 18 trainees who are taking training courses abroad in Egypt, Tunisia and Algeria, all of which are destinations that have similar tourism.*
>
> (GBT2)

> *I am sorry to say that our training courses are not acceptable to 5-star hotels. Last year, for the first time, the company sent a number of employees abroad to take training courses and although they were short, they were successful.*
>
> (Hotel2)

> *Our tour guides are experienced in foreign languages, and some of them have attended the training programmes which were provided by the Ministry of Tourism in the past, but these programmes are no longer held.*
>
> (TourOp2)

> *I remember in 1983 the government sent some students to study in the UK, and they returned in 1989. However, since that time the government has stopped sending students abroad to study hospitality. The government must learn from the experiences of people in other destinations, such as Egypt, Tunisia, Dubai and Morocco.*
>
> (Resident7)

When the main player is injured, the substitutes are a good alternative. Even though no private colleges are conducting training courses in tourism and the hospitality field, what is worse is that the government has stopped running training courses, hence, tour operators and hotels have no way of developing their employees‟ performance just through implementing internal training programmes.

> *We are possibly the only agency that arranges training courses for guides; the participants pay symbolic fees, but we have to bear most of the expense. Last summer we arranged training for about 70 guides.*
>
> (TourOp1)

> *The company conduct simple training courses for two or three weeks, but these are not effective. I noticed in some international hotels in Egypt that they conduct durable training courses for all the hotel employees; this is a good idea and makes the employees aware of the nature of their jobs as well as creating organisational loyalty. The notion of hospitality work is still unknown in Libya and most of the workers in this sector do not appreciate the value of the customer; they very much have a 'take it or leave it' attitude.*
>
> (Hotel4)

> *We conduct training programmes quite regularly and our current employees appreciate when they lack particular skills; we attempt to remedy the situation by providing them with training courses, mostly in foreign languages and hospitality. However, the need for training courses varies from one employee to another, depending on the position, qualification, experience, and nature of the job.*
>
> (Hotel5)

The researcher attempted to establish why the GBTTI stopped conducting training course for tourist guides, which has had a significant impact. However, some hospitality courses have proved unsatisfactory and, additionally, state hotels have complicated procedures for participants on training courses abroad. GBT1 denied that the GBTTI stopped conducting training courses; he added that it was probably suspended for other reasons.

> *Some tour guides have attended training programmes in the GBTTI and they have been given identity cards to guide tourist groups. However, these constitute very few people and one training course is not enough; the courses stopped completely a long time ago.*
>
> (TourOp2)

> *There are very complicated procedures: we have to get approval from the GPC of Manpower and Training; we pay the course fees, the trainees' expenses and the airline tickets, so I question why we have to obtain permission from this committee.*
>
> (Hotel2)

7.6.3.4 Cultural impacts on tourism jobs

Culture has an impact on all aspects of life. However, the study revealed in the big cities there are increasing signs that the Libyan mentality has become more open, and Libyans now undertake physical jobs that are still not accepted in smaller cities and villages. These include jobs such as waitering, cooking and cleaning services; although the unemployment rate in Libya is high, many people do not like to do such those jobs. „*From my experience of over 17 years in the hospitality sector, people have refused to work in this sector; now the work is accepted but less so than with our competitors*" (Hotel8).

> *In the beginning it was hard, because no one had any idea about tourism, but now the situation has changed and you can see Libyans who are very happy and enthusiastic about working in hospitality. In addition, we offer regular internal training programmes.*
>
> (Hotel5)

> *I would agree to most tourism jobs, such as that of a guide, driver or restaurant owners. In hotels and restaurants, people do every kind of job now with pleasure and there is no problem. I think the mentality has changed. There is nothing to be ashamed of if you work as a waiter in a restaurant.*
>
> (TourOp1)

> *In the past it was very difficult, because the profession of hospitality is not accepted in the Libyan community. Libyans still cannot accept some hospitality services, such as that of a waiter or housekeeping. Moreover,*

> *the community considers women who work in the hospitality sector to be unrespectable. This situation is combined with low salaries. Can you imagine, a waiter receives just 120 Libyan Denar monthly!*
>
> (Hotel2)

Hotel4 argued that some shops and hotels struggled to convince Libyan people to do their kind of work. In the services, they are shy when they meet their friends or families. This reluctance also extends to graduates.

7.6.4 Environment issues

Despite the environmental protection laws passed in the 1990s, there are still considerable legislative shortcomings in the industrial sector, as well as with waste disposal and recycling. Libya‟s General Environmental Authority, established in 2000, has however begun to take action (UNDP: Human Development Report, 2005). Notwithstanding some progress in cleaning the streets and motorways, the government appears to be incapable of dealing with environment issues. Some cities suffer from this problem more than others, especially at the access points to cities (TourOp7) and domestic tourists harm the tourism attractions, leaving rubbish everywhere and damaging the tourism sites (Resident6) (see Figures 7.37 and 7.38).

Figure 7. 37: Tourism site at Trjoura

Figure7. 38: Rubbish outside the cities

The government does consider this to be a shame, but it should be pointed out that the phenomenon does not affect Libya alone.

> *There is obvious neglect of environmental issues, both in the towns and cities (including the hotels) as well as at the tourism attractions. For example, people are still using plastic bottles and bags, although nowadays many countries are seeking to reduce this.*
>
> (GBT2)

> *One of the main problems that the tourism sector is suffering from is the litter caused by plastic packaging and bottles. The whole world is suffering from this problem.*
>
> (GBT1)

The researcher asked a government if he considered that Libya was as clean as Britain, to which he replied: *'No. There is obvious neglect concerning amenities by councils due to a lack of awareness and my job is not to control them'* (GBT1).

The only comment that can be added concerning this attitude is that the government committees and authorities have no specific objectives and lack collaboration and coordination. The government should therefore take urgent action plan to protect the

environment, and this task should have priority. It is an enormous shame and tour operators must also take action to keep tourism attractions clean and tidy (TourOp3). For their part, tourists have expressed their regrets about this beautiful country falling down because of lack of cleanliness.

> *There are some very beautiful sites, but the litter in the country is terrible. We have been to the Koff Valley, which is a beautiful valley, but it is heartbreaking: litter is a big issue for Libyan tourism. There are some impressive sites, but the country could be much better environmentally.*
>
> (Tourist1)

> *There is a big problem in general, not just with the beaches: the problem is the litter and rubbish and there are plastic bottles and bags everywhere. It is a huge shame.*
>
> (Tourist2)

> *Rubbish is the first enemy of the Libyan tourism industry. Every single tourist notices the problems of rubbish, plastic bags and bottles and especially at the access areas to the cities.*
>
> (Resident9)

> *As regards pollution, I can tell you this country is one of the worst countries. For example, in Tripoli all the used (drainage) water goes to the sea. There is rubbish everywhere, so where is the state? Where is the government? People assume that a company collects the rubbish, but this does not happen. It is a very bad problem, which is very great shame.*
>
> (TourOp1)

„*The environment protection authority does not perform well, and it is not coping with developments; they just take the rubbish to the rubbish tip*" (Hotel2); „*this is a big problem: from the entry point of Ras-Jedair, tourists ask about the plastic bags and rubbish spreading left and right*" (TourOpe2); „*pollution is a big problem; you even find rubbish in the desert and on the hard shoulders of the roads. All our tourists talk about this, telling us our country is nice but we are destroying and harming it* (TourOp6).

Clearly there are no rubbish-collecting companies operating in Libya, and if there are

some public or private companies doing this, they there are not enough of them and they are not effective. Any talk about hosting international events or national developments should therefore consider the environment first.

7.6.5 Marketing strategies

The researcher considers that destination marketing is different to product marketing, and is also different to domestic marketing. Destination marketing is the process of addressing and analysing the target markets, and includes an understanding of the potential tourist"s needs, wants and tastes. This should also consider economic conditions, such as exchange rates, inflation and income. Therefore, destination marketers must implement effective marketing plans and strategies to increase the number of tourists as well as to maximise the benefits and profits with tourist satisfaction. In this regard, Libya has entered the tourism market with no specific plans and targets; the GBTTI does not have any effective marketing activities, except its participation in international exhibitions, such as the World Travel Market. Libyan tour operators have attempted to participate in international tourism events, using their websites to attract tourists and some e.g. TourOp1, 3, 7 have indeed established partnerships with foreign tour operators. According to the Moroccan Ministry of Tourism, Morocco spends about 43 million Dirham promoting the country abroad, while in comparison, Libya has insufficient funds allocated to promoting the country on international tourist markets. Even Tunisia has five official offices in the UK for tourism guidance and marketing (TourOp5). Therefore, the next section considers Libya"s tourist markets, marketing in foreign markets, mix marketing, marketing segmentation, the destination brand and differentiation and tourist satisfaction/loyalty.

7.6.5.1 Libya's tourist markets

The main leisure and recreation tourism markets are Italy, Germany, France, Britain, Spain, Malta, Tunisia and Egypt. Surprisingly, there are no plans or market research for those markets, and this combined with an absence of effective marketing activities abroad constitutes the main reason why a low number of international tourists visit the country. Therefore, tour operators and hotel managers are unable to identify the tourists" wants and needs, with the exception of the Corinthia Bab African Hotel, which has some five-star experience in this field. One hotel manager added to this:

> *The small size of tour operators and travel agencies combined with limited effort is a huge disadvantage. In Tunisia, for example, the government supports the tour operators. The GBTTI did open a homepage on the Internet imitating competitors, but they did not really market Libya abroad. The administration was in conflict and there was huge bureaucracy; every secretary has to wage war to obtain a position, and when they have reached it, they have to fight to keep it, so they have no time for work and development.*
>
> (Hotel1)

A manager at the GBTTI was asked if they have got any research for British tourists" needs, wants and requirements:

> *Britain is different to the other Western countries; British tourists are known for nagging and complaining, and they expect everything for nothing. In addition, British tourists are sensitive and it is hard to offer them all they want.*
>
> (GBT1)

When he was asked how he came to this conclusion, he replied:

> *I drew my conclusions from my experience and my participation in the international fair in London. If the Italian and Spanish tourist do not find what they expect in a new tourism destination, they do not complain and ruin the atmosphere of the trip, but British tourists require special treatment.*
>
> (GBT1)

Later the researcher asked the British tourists about their needs and they stated that they were looking for basic requirements and a clean environment. It can therefore be concluded that without scientific market research, personal judgement still raises questions, which may be right or wrong. What follows are the perceptions of tour operators and hotel managers about their customers" needs and wants: „*You cannot identify the tourists' special needs, but in general, tourists are looking for cleanliness, safety and a place far away from noise that has an ambience*" (Hotel3); „*to be honest, what we are doing is making individual efforts, because market research does not exist in this country; we understand our tourists from our experiences with them*" (TourOp3).

> *After years of experience, we are starting to understand the tourist's needs, particularly as regards our practical tourism, which is called cultural tourism. The main needs of the tourists concern accommodation; this should be very acceptable accommodation, but not necessarily of a high quality. It should be clean and each room should be provided with particular amenities. There should be easy transportation, hygienic food services and a confident tour guide.*
>
> (TourOp1)

The marketing manager of the Corinthia Bab African Hotel explained how they identify their customers" needs and wants:

> *Business people's needs differ from the tourist groups; we attempt to satisfy all customers and segments: for instance, tourists prefer rooms that have nice views and face the sea and they are interested in particular food restaurants and local festivals. However, business people are very concerned about time, peace and quiet and communication services such as the internet. In terms of national characteristics, we have noticed that Germans are very preoccupied with time issues, the English are a little strict, while others, like people from the Mediterranean countries, such as Italians, Greeks and Spaniards, are more flexible.*
>
> (Hotel5)

7.6.5.2 Marketing Libya in foreign markets

As previously mentioned, different overseas markets have different requirements, and need appropriate marketing tactics and strategies. The study found that the main marketing tools used to attract foreign tourists (including the British), are: participating in international fairs, internet websites and partnerships with foreign tour operators.

> *The English are more fearful of entering the Libyan market. They are still conservative, unlike Germany and France; in addition, in the UK there is insufficient promotion and advertising, which should be the main duty of the General Board for Tourism and Traditional Industry.*
>
> (TourOp6)

> *There is a shortage of marketing outside Libya. Moreover, Libya's tour operators are small-scale operations so they cannot deal with big tour operators and travel agencies in the UK, for example. Even our hotels are small and have a lot to do to be competitive.*
>
> (GBT2)

According to the TourOp1, Libya does not have a single international tourist information centre apart from one in Ras-Jedair on the Libyan-Tunisian border. However, that one is empty.

> *I did not see pamphlets anywhere, did you? Or booklets, we just use a general guide; I never saw a poster anywhere. But if we came here independently it would be more difficult. We did not see any town maps; we did not see any Tripoli maps, did you?*
>
> (Tourist4)

> *The government does not promote the country in Europe or America. Libya participates in international exhibitions, but the festivals are ineffective and useless. I attended an international tourism exhibition in Berlin and I saw the Libyan section: it was very basic and poor.*
>
> (Resident7)

> *I would like to see some foreign TV channel programmes about Leptis Magna or Sabratha. Non-visitors, when they go to travel agents find brochures about Egypt, Tunisia or Morocco, but not about Libya.*
>
> (Resident8)

> *We deal with adventure tours and travel bag agency. In a nutshell, the policies of the main players, the tour operators in the UK, have demonstrated a lack of trust in the Libyan market so far, and therefore the tour operators have not tried to enter the Libyan market. I question why British tour operators have not tried to enter the Libyan market and still have a negative image of Libya, or they have no idea what Libya has to offer; I don't understand it.*
>
> (TourOp2)

> *We have subscriptions to international fairs; we market our products through advertisements, brochures and connections with foreign tour operators in the target market, and secondly though the Internet; tourists visit our website and contact us for more information and reservations. We have a good website page with all the required information; additionally we have links with important web pages, namely Libya online.*
>
> (TourOp3)

7.6.5.3 Mix marketing (4Ps)

Mix marketing or what is called the 4Ps is developed by Borden n 1964, which concerned about the policies and activities of the tourism **p**roduct, **p**ricing, **p**romotions and the **p**laces of distribution (ICMBA, 2009). The study revealed that Libya has high quality tourism products, in terms of its long coastline on the Mediterranean Sea, the Greek and Roman archaeology, ancient cities, the largest hot desert in the world and the pre-historical civilisation in the Acacus Mountains and more. In general, Libya is a cheap destination, but packages are expensive due to the air tickets and the weak competition of the Libyan tourism industry. The GPC and GBTTI do not do much to promote the country abroad (as discussed earlier in destination image section), where the tour operators are attempting to market themselves within their limited resources.

> *The country has a long beach, lots of historical places, a large and wonderful desert and a very rich history. However, I think all these attractions are not enough: these objects can't market themselves; we need to do more to attract people to come to our country.*
>
> (Resident3)

> *Libya is history: it has had a variety of historical civilisations throughout the ages, including pre-historical, Phonetician, Greek, Roman, Byzantine, Ottoman and Islamic civilisations. We also have a unique desert and oases, as well as sand dunes for adventure tours.*
>
> (TourOp3)

Despite British tourists having to pay all their expenses in advance, they notice that the country is not expensive, but as a whole package it is expensive; this issue will be considered in greater detail in the next chapter when a comparison is made between Libya"s holiday packages and those of its competitors. However, all the prices apply to locals as well as tourists, with no distinction being made, such as with Egypt.

> *The prices are very cheap compared to other Arab countries and the hotels are cheaper as well.*
>
> (Resident7)

> *It is cheap, very cheap compared to some other countries; this includes everything, the hotels, flights, transportation and the meals. Additionally, it even includes the entrance fees to the museum and sites.*
>
> (Tourist 3)

> *For a group like this, everything is paid in advance, so we do not see the restaurant costs. But in general, drinks such as coffee are cheap.*
>
> (Tourist6)

> *It is very expensive, because of the costs of the flights.*
>
> (TourOp7)

Promotional activity includes advertisements, TV programmes, CDs, films, brochures, magazines, newspapers, Internet advertising, posters, etc., and destination marketers use one or more of these promotional tools, depending on their effectiveness, costs and target audience. The government wants the international media to do this job so that it does not have to. Because of this, tour operators complain about the lack of government promotions and support, while hotels struggle to follow the sector developments and lack of competitiveness.

There is an absence of marketing, including promotions and advertising and the costs are high compared to our neighbours.

(TourOp6)

The local TV repeats some programmes about the desert and tourism attractions, without providing sufficient information about them, their importance or how to protect them.

(Resident1)

We did not implement anything for promotion because it is very expensive. We will open a homepage on the internet and devise some posters.

(Hotel1)

Over 25 years we have had no marketing strategy, because in the past there have not been any hotels in Libya, and there was no competition to make you adopt a marketing strategy. However, nowadays, the company has the sense of emerging new competitors, and it has started to implement some marketing strategies.

(Hotel2)

7.6.5.4 Marketing segmentation

Marketing segmentation divides the market into sections and targets the best segment to achieve a particular goal rather than one that serves the whole market; this saves money, time and effort. Libyan decision-makers involved in the tourism sector would like to concentrate on quality tourism rather than mass tourism, but they lack the dynamism to adopt these strategies.

Our policy is to focus on the selective cultural tourists, rather than mass tourism and, unlike Tunisia, the Libyan tourism product will be of a high quality. Each country has different strategies. For example, we concentrate on selective tourism, while others focus on mass tourism. We don't deny that Tunisia has good tourism amenities, but it cannot compete with Libya's fundamental tourism attractions.

(GBT1)

We have to specialise in particular tourism types. We have to target less quantity with higher rewards and not target mass tourism.

(TourOp3)

7.6.5.5 Destination brand and differentiation

With the increasing phenomenon of globalisation, destination brands are becoming ever more essential to promote a destination and differentiate it from its competitors. Libya is therefore in the process of developing a destination brand. It is suggested in this study that destinations must use their tourism products as brands; these could be natural resources, heritage, culture or created resources, as tourists come to visit and experience these comparative advantages. It is not recommended, however, that supporting resources should be used as brands, since tourists do not come to see accommodation or infrastructure even though they use it. Moreover, tour operators, hotel managers and local communities are not involved in developing NTDP or developing a destination brand, but they have suggested for this study some elements that could be used as Libyan brands. „*Destination brands are very important and there are committees working to develop Libya's tourism brands*" (GBT1); „*the GPCT (tourism ministry) previously used Libyan treasures as a destination brand, but I don't know what happened, and I do not know if this brand is suitable*" (TourOp6).

> *The sea, the beaches, the desert, and the Omar Al-Moktar film. Many people worldwide have seen the Omar Al-Moktar film as well as the stunning oases.*
>
> (Hotel5)

> *If tourism is considered and supported, we could be better than our neighbours in tourism fundamentals; our beaches are better, we have the desert, and some places have not been discovered in the desert yet. When we read about Libyan rich history, the historic sites and everything that encourages foreigners to visit the country, usually to develop a brand, a committee selects the best brand.*
>
> (Resident1)

> *There are a lot of choices and much diversification. Leptis Magna, Sabratha, Cyrene, the desert, Tbisti, Acacus, Alhoroj need to develop brand needs with specialists.*
>
> (TourOp7)

There are a number of names that could be used as destination brands, but the brand should be recognised and differentiate the destination from its competitors; the location, heritage, people, safety aspects and desert are factors that differentiate Libya and make it unique.

> *We are recognised by our heritage, archaeology and historical characteristics. The tourism ministry uses a brand denoted by yellow, blue or green. Alternatively, it uses silent treasures. This is complicated; we need something simple. We have to use the word 'Libya' in the brand to make it easy to recognise this advertisement. I think this is a task for those interested in advertising and marketing.*
>
> (TourOp2)

> *The people seem different and friendly. I like that and I think the monuments here are pretty. Greek and Roman monuments cross parts of the country and are so different, so it is very attractive and the Green Mountains are lovely.*
>
> (Tourist4)

> *Just the quality of the antiquities are amazing and for tourists from Europe, these are very close. Libya is not closer than Tunisia, but certainly it is close to many countries.*
>
> (Tourist6)

> *Definitely, just the Mediterranean Sea is enough for Libya to be a tourist destination. Libya can exploit its long and beautiful sandy beaches; moreover, it has stunning weather, even in the summer.*
>
> (Hotel5)

7.6.5.6 Tourist satisfaction and loyalty

Tourist satisfaction is the level of fulfilment in meeting the tourists" needs, wants, requirements and expectations and is usually measured by asking the tourists to what extent they were satisfied with the destination in general. Destination loyalty, however, denotes the desire of the tourist to repeat a visit or recommend it to his/her relatives and friends. Despite their sometimes critical views, all the British tourists who were interviewed were satisfied and would recommend Libya to relatives and friends. „*We*

have a lot of information about the country, the sites and the farming and traditions" (Tourist 4).

> *I have just returned from my visit to Libya and I can honestly say I have gained tremendous knowledge about the ancient world antiquities., I have been to Tokra, Tholmitaha, Cyrene, Leptis Magna, Sabratha and the beautiful Villa Celen, which is beside the sea, and the mosaics and frescos are so beautiful.* (Tourist3)
>
> *I think most of the group I came with feel that they have had a very interesting visit and want to come back again.* (Tourist6)
>
> *All our tourists were satisfied: they started with negative preconceptions about Libya, but when they came, they were surprised.* (TourOp6)

7.6.5.7 Destination Competitiveness

The number of Libya"s international arrivals represents less than 5% of any of its competitors" arrivals and constitutes less than 1% of the MENA market share. The tourism industry here is very young compared with Egypt, Tunisia or Morocco and therefore Libya is regarded as a new tourism destination. The study explored Libya"s unique and diverse tourism product to compete in the MENA market. However, the tourism supporting resources and facilities do not as of yet exist, and this is combined with a lack of management experience in the tourism and hospitality field. According to the GBT1, Libya cannot compete on the international tourism market: it has a lot of tourism attractions, but a lack of awareness about them. Anther interviewee added: Libya has the fundamentals and the tourism attractions to compete in the Mediterranean Sea area, but with the current facilities it cannot; it should develop the sector first and then it can compete (Resident8). Libya is not in a position to compete with its competitors (Risedint9).

> *We have the money to build everything; we have the financial resources to prepare the country to welcome millions of tourists per year. We have beaches where they can relax, the Sahara, archaeology; we have something for everyone; the problem is that we are not using our resources in the right way.*
>
> (TourOp1)

> *Libya is not able to compete without media; Libya has the most important thing for tourism, namely security: safety and security in Libya is 100 per cent. Tourists do not need to have vaccinations for any kind of disease: it is a healthy destination. There is the huge desert, it is easy to get a visa and the people are friendly.*
>
> (TourOp7)

> *To be honest with you, as a new tourism market there is no competitor for us. However, as regards services and the infrastructure, we cannot compete in the market. Libya is rich with resources and if there is a good plan, I think within 5 years it will be a tourism destination competitor, even for Spain. It will be one of the ten main players in the tourism market.*
>
> (TourOp2)

7.6.6 Service quality

Service quality has many definitions depending upon the industry and purpose. The author believes that the quality of destination services is concerned with the value of all the services received by the tourist after entering the destination as well as the extent of his or her satisfaction. Consequently, in this section an attempt is made to evaluate the services provided to the tourists in areas such as accommodation, transportation, restaurants and tour guiding. The study revealed that there is probably one hotel and a small number of restaurants in Tripoli that provide good quality services, but the infrastructure of airports, hotels, restaurants and cafés lacked the quality edge. Even the government officials admitted that quality is an issue for Libya‟s tourism industry. „*The first problem is that the infrastructure has not been completed in Libya. The quality of the hotels does not satisfy the tourists in classes A and B*‟ (GBT1).

As regards quality, the Corinthia Bab Africa Hotel has good quality service, but most of the hotels lack this, particularly those based outside the capital: „*The hotels are very poor in terms of quality, and it is a shame for Libya*" (Resident 3).

> *The hotels are not good and lack reliability; the tourists are told that the rooms are of high quality, but when the tourists come here they realise that the rooms are basic and expensive.*
>
> (Resident6)

> *Mentioning no names, some hotels lack care; for instance, sometimes they do not change the duvets and pillows; some of the furniture is old and the tourists are very sensitive. Therefore, the quality of some of the hotels is poor. There is no control or monitoring of quality for hotels.*
>
> (TourOp6)

Strong evidence has come from the tourists and tour operators, who have experienced a variety of problems relating to hotel quality: „*The hotels and accommodation are limited and some of the locations are unsuitable and poorly designed*" (Resident9).

> *The hotels are mostly friendly, but some of the rooms are like offices, they are often small and there are a lot of little things which do not work. The lifts often break down, the keys in our rooms sometimes do not work, the windows are easy to open and difficult to close it, and at breakfast there are no knives and forks, and the waiters do not bring new ones,… but not all these things occur at the same hotel.*
>
> (Tourist5)

> *One or two hotels have good quality, but the majority of the cafés and restaurants have no quality, no control and little hygiene compared with Tunisia, for example. Some types of food are excellent and of good quality. The General People's Committee of Public Amenities is responsible for public toilets but there are no services like public toilets or restaurants on the highways or the main roads.*
>
> (Resident4)

> *The hotel was established in 1983, and since that date no major maintenance has been carried out. This is the company's responsibility, and the initial costs of the maintenance are estimated at about 16 million Libyan Dinar, but the owner of the company, it seems, does not want to pay this amount for maintenance.*
>
> (Hotel4)

There is an argument among some Libyan tourism stakeholders about the service quality of the restaurants, as can be seen in the following examples: „*the restaurants are fine and clean, and offer good quality food; the tourists are satisfied with the service*" (Resident5);„*the quality of the restaurants on the way to the destinations is not good*" (TourOp3); „*there has been a big improvement, a number of the restaurants provide excellent services, but other restaurants need upgrading and development*" (TourOp1).

> *'I stayed in ____ Hotel which is private and very big; it's good but the service in the restaurant is not very good because they lack experienced staff.*
>
> (Tourist 6)

> *People who work in restaurants are mainly from Tunisia and Egypt, the service is not good, the toilets are dirty. Between Ras Jdair and Amsaid there are no services for tourists, such as public toilets, garage services, or good restaurants.*
>
> (Resident 6)

> *There are one or two cafes and restaurants with good quality, but the majority have no quality or control and lack hygiene compared with Tunisia, for example. However, some types of food are excellent and of good quality.*
>
> (Resident 4)

This problem was experienced by the researcher when travelling from one city to another to collect data. On July 2007, the researcher drove his car from Tripoli to Leptis Magna, the Roman antiquity. On the way, he decided to have lunch in one of Al-Kumis tourism restaurants; he ordered a meal including half a roasted chicken and a can of Coca-Cola. The size of the chicken was very small, and there was a hair on the can. When the researcher questioned the waiter about the chicken, the waiter stared and took the chicken away. When the researcher asked him to clean the can, the waiter declared: "*You can do it by yourself*!" At this point the researcher asked to see the manager but was informed that the manager was not in the restaurant. The researcher then attempted

to contact the manager on his mobile phone (printed on an advertisement for the restaurant‟ but the number was unavailable. For the researcher, this kind of behaviour presents a real challenge as the people in the service industries, such as restaurants, must listen and consider how to treat the customers, paying particular consideration to matters of hygiene.

The researcher paid for the meal and went to the local council department to discuss the issue with the manager of the department. He explained that he was conducting research on how to develop Libya‟s tourism industry and indicated that quality of service was one of the main considerations of his research. What had occurred in the restaurant was a scandal and such behaviour could have a negative impact on Libya‟s tourism. The council officers treated the complaint formally and opened an investigation into the case, finally the restaurant closed down.

The following day, the researcher interviewed the manager of Gus-Alteek in Musrat, 210 km east of Tripoli. On his return, he stopped in the city of Zleten, where there was a large and nicely decorated restaurant. It was about twelve o‟clock and the researcher asked the waiter what kind of meals they had. When the waiter replied that they were serving meals after one o‟clock, he ordered a Kebab sandwich and grape juice. The researcher then noticed that the waiter was heating the sandwich in a microwave and asked him immediately when he had prepared the sandwich. The waiter was a foreigner and replied that he had prepared the sandwich in the previous few minutes. The researcher was still suspicious after his bad experiences of previous day and when he opened the sandwich he was surprised to see a dead cockroach in the sandwich. The

researcher asked the restaurant manager how much they charged for cockroaches and then showed the sandwich to the baffled manager. The manager and the waiter apologised and attempted to convince the researcher it was an accident and that this was the first time it had happened. Unfortunately, the researcher had no time to make a formal claim for closing the second restaurant but such experiences reveal the absence of quality control in public restaurants and cafés in Libya.

Service quality is also sadly lacking in the financial and banking institutions, these running on old-fashioned systems which are not competitive.

> *Usually, we take local currency, but we also accept foreign currency as well; we do not accept credit cards yet. The Al-Aman Bank promised to install a system where we can accept credit cards.*
>
> (Hotel1)

The tour operators try to offer good service quality for tourists but ultimately most of the services are provided by other organisations, such as hotels, restaurants, airlines, and transport companies.

> *At least 90% of our tourists were satisfied. Our brand is friendship through tourism, to show tourists that we care for them, offering the best service, creating a dialogue and treating them with respect. We want to let them know that they are regarded as friends or guests more than clients.*
>
> (TourOp1)

> *As regards British tourists, we do not have any problems with them, because their requests are simple. In addition, the food services have improved because of the development of tourism activities. This has resulted in the establishment of many restaurants serving good and acceptable food to British tourists.*
>
> (TourOp1)

Some stakeholders have made recommendations to improve the quality of services in the Libyan tourism industry, as follows:

> *Tourism schools and institutions need to be established across the country and language tuition should be taken into consideration. Security escorts must also be qualified and action needs to be taken to enhance the hotels, transportation, information centres and public toilet facilities.*
>
> (TourOp3)

> *I would re-focus on the importance of external training courses which follow developments in the hospitality industry.*
>
> (Hotel4)

> *Work needs to be done on human resources development by preparing training programmes, especially foreign programmes in developed countries. We also need to pay more attention to hospitality institutes and open more universities in the hospitality and tourism field. We should establish new hotels and resorts by encouraging foreign investors and the private sector and concentrate on recreation and areas of relaxation/entertainment where tourists can spend their leisure time.*
>
> (Hotel5)

Services quality is one of the key areas in which to gain a competitive advantage and all tourist services should concentrate on quality. In addition, quality should be monitored to ensure that such quality services are sustained; the GBTTI should also establish a department for quality service.

7.7 The global environment

Clearly, national destinations are influenced by the global environment. This influence depends upon the degree of distance between the destination and influencing factors. The main factors that have an impact on tourism destinations are problems such as the global economy, natural disasters, wars, disease, exchange rates, innovations, terrorism, and competitions. This study focuses primary on tourism elements and does not consider the destination global marketing environment, because it is a hugely complex and broad-ranging area; the stakeholder cannot measure, for example, the influence of swine flu, or the global economic crisis. The study does, however, remind destination

managers and marketers about the significance of the global environment and its impact on both the target markets and destination developments.

7.8 Summary

Chapter 7 analysed and evaluated Libya‟s tourism industry; the researcher adopted the SCDM as a framework for the presentation of the results. This consists of the main elements of tourism destination, including destination accessibility, supporting resources, comparative advantages, local communities, destination planning and management, the quality of services and the global environment. All Libya‟s tourism stakeholders (government representatives, tourists, tour operators, hotel managers, and local residents) were part of this comprehensive investigation. The researcher‟s photographs and observations also provided strong evidence to support the findings and results of this study. Chapter 8 will now discuss Libya‟s tourism industry in more detail, linking it with the literature review. It also will analyse Libya‟s tourism industry by conducting a SWOT analysis, and developing a best practise SCDM.

Chapter Eight therefore discusses the findings and results of Chapters Six and Seven. The discussion explains the meaning of the findings and evaluates Libya‟s tourism industry. This chapter also analyses the Libya‟s tourism industry using a SWOT analysis. Finally, chapter eight develops a best practice model for developing Libya as an internationally-competitive tourism destination.

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Chapter 8: Discussion and analysis

8.1 Introduction

This study was intended not merely to added knowledge in Libya's tourism context; it also designed to provide an academic approach for Libya's decision-makers to develop the tourism industry. As mentioned in Chapter Five the term government in this case means the General People's Congress, the GPCs and the GBTTI. Chapter Eight discusses and analyses the findings and results of the study presented in chapters six and seven and reflects on the literature review in chapters three and four. It also examines the SCDM developed in Chapter Four and discusses the elements of the model in more detail in relation to the Libyan tourism industry. This chapter uses a SWOT analysis to identify the strengths and weaknesses of the Libyan tourism industry in order to explore any opportunities and threats that Libya's tourism industry may face in the future. This chapter then develops a best practice model (SCDM2), which should enable Libya as a destination to gain sustainable competitive advantage.

8.2 Background

Morgan and Pritchard (2004, p.60) argue that:

> *Most destinations have superb five-star resorts and attractions, every country claims a unique culture, landscape and heritage, each place describes itself as having the friendliest people, and high standards of customer service and facilities are now expected.*

Chapter Eight investigates Morgan and Pritchard's claim by showing that is Libya one of those destinations which is unique and has five-star attractions? As tourism

management becomes more complex, due to increased competition in the tourism market place, destinations cannot ignore their competitors. In this regard Crouch (2008, p.16) maintained:

> *Tourism destinations around the world find themselves competing against other destinations more than ever before. The increasing global mobility of tourists means that new competitors are emerging globally, not just locally. Therefore, destinations cannot afford to escape the competitive challenge.*

Moreover, tourists nowadays have more experience with tourism destinations and activities (Ashworth and Goodall, 1990) and therefore competition has become a hard mission. According to Pike and Ryan (2004), destinations often compete via images alone.

> *Destination image is a valuable concept in investigating the destination selection process and has contributed to our understanding of tourists' behaviour.*
>
> Baloglu and McCleary (1999, p.144)

Baloglu and Mangaloglu (2001) assert that destinations basically compete on their perceived images relative to competitors in the marketplace. However, little attention has been paid to destination image in particular regions, such as the Middle East (Schneider and Sonmez, 1999; Weir, 2007). This study is therefore regarded as the first study to explore Libya's image in the UK and analyse the entire Libyan tourism industry as a pathway by which to gain sustainable competitive advantage.

The mass media plays a critical role in destination image formation, particularly in Middle Eastern countries, due to their reputation of being regions of conflict and turmoil (Schneider and Sonmez, 1999) and this applies to Libya in particular. Hence, destinations with a strong image are more favoured in the potential tourist's mind, while

destinations with image problems are more likely to be avoided. Libya needs to identify its image in the tourist markets, including the UK which is, according to the UNWTO (2007), considered to be the fourth biggest tourist-generating market globally.

8.3 Libya's image in the UK market

The study revealed that salient destination image attributes vary from one destination to another, depending on the purpose of the visit (leisure, business, visiting relatives, friends, religion and others). Moreover, the salient destination image attributes differ according to whether winter or summer holidays are being considered. The study highlighted that holidays are not just relaxing occasions, but tourists also enjoy undertaking particular activities, such as sightseeing in cities, visiting museums and galleries in addition to shopping. The study also revealed that favourite tourism destinations are those which have a diversity of tourism attractions. Potential British tourists identified 23 salient tourism destination image attributes, these being: friendliness; personal safety; climate; a choice of ambience; information availability; expanding personal knowledge and gaining experience; adventure opportunities; cultural festivals and events; cultural attractions; landscape; beaches; the environment; language barriers; access to cash; transportation; local infrastructure; accommodation; food and drink quality; shopping facilities; standardisation for families; accessibility; currency value and sporting facilities.

This indicates that British people are concerned with their safety and relationships with the locals, while shopping, the value of the currency and sporting facilities have less priority. As a result, those involved in tourism in Libya must concentrate on the most

important image attributes and understand tourists' needs and wants as a first step in the country's marketing strategy. A study recently conducted by Crouch (2008) identified 10 of the 36 destination competitive attributes as being significantly greater than average, namely: physiography and climate; culture and history; a mixture of activities; the tourism superstructure; awareness/image; special events; entertainment; infrastructure; accessibility; positioning/branding. Crouch's study relies upon the views of experts, whereas this study concentrates upon British potential tourists, who are more concerned about the destination atmosphere. This study also revealed that the significance of the tourists' image attributes differ for destination experts and marketers; for instance, destination image, positioning and branding may not be important factors for potential tourists.

As discussed in Chapter Seven, the media in the UK used to be full of the Qudaffi conflict with the West and Libya was often linked with a range of controversial political issues, such as human rights issues, terrorism notably the Lockerbie attack and the release of Magrahi and compensations for Lockerbie victims. These political issues promote negative images in the minds of potential tourists. Notwithstanding this, the top five UK tour operators do not offer package tours to Libya, Thomson (with 27% of the market) Airtours (with 18%), First Choice (with 15%), Thomas Cook (14%) and Carlson (1.5%) (Klemm and Parkinson, 2001). This study therefore attempted to interpret the avoidance of British tour operators to offer packages to Libya. In this regard, Libyan tour operators believe that:

1- British tour operators are suspicious and cautious about entering the Libyan market; they are still conservative, in contrast to Italy, Germany and France (TourOp6);

2- Large foreign tour operators need large hotels, resorts, local tour operators and travel agencies to deal with and to establish partnerships. Suitably sized operations do not currently exist in Libya (TourOp1);

3- British tour operators do not enter any market without market research (which is not available for Libya) and they want everything to be organised and on time (TourOp6).

It can therefore be stated that UK tour operators and travel agencies consider the Libyan market to be associated with high risk, and they require information, market research and the guarantee of reliability. This is different to Italian, French and German Tour operators who can cope with the Libyan market conditions. Not surprisingly, the vast majority of British people have never seen, brochures, posters or any programmes advertising Libya, and the only piece of information people in the UK have about Libya is that Qudaffi controls the country and is accused of supporting terrorism. It was observed from the focus group interviews that British people were unable to identify any differences between the cultures of Egypt, Libya, Tunisia and Morocco. Focus group members indicated that Libya has had enough time to establish high quality hotels and infrastructure and compared it to the United Arab Emirates. In addition, they have no idea about Libya's natural resources, heritage, culture, festivals, events or family holidays; some even asserted they had never heard that Libya was a tourism destination.

The English language is widely understood in Libya, but focus group members considered Morocco and Tunisia seemed to be more friendly towards the British. When

focus group members were asked what perceptions they hold about Libyans, one member emphasised that: '*I don't think I had a particularly strong image before, except perhaps some negative images we had about the politics from the media…that's a negative image I suppose*' (FG3C1). As a result of this negative image, British people are clearly concerned about their safety, and Libyans in the tourism field have considerable work to do in the UK so that they can understand why less than 15,000 British tourists visiting the country each year (GBTTI, 2009), compared with 364,000 visiting Tunisia in 2008 (Tunisia Tourism Ministry, 2009).

In general, people in the UK would seem to have no concept of Libyan food but they do realise that alcoholic drinks and wine are band in Libya. In the interviews, the country was also not considered as a place for ambience; rather it was deemed to be noisy, influenced by Arabic culture and full of large families. Potential tourists from the UK also believed they could use credit cards and withdraw cash at any time from cash machines in Libya. The country has a low position in the perception of potential British tourists, while Egypt and Morocco are their favourite destinations in the MENA. It can be concluded that Libya will not be on the list of preferred destinations for holidays with potential British tourists at least in the near future.

The complete absence of marketing and promotional activity in the UK market has two implications. Firstly, people in the UK are unaware of Libya as a tourist destination and have no idea about its heritage, culture, natural resources or the places they can visit. Secondly, and even more worrying, British people appear to have a negative image of the country, its people, and destination safety. In addition, the focus group members

have an inaccurate picture of Libya. This ignorance is combined with the lack of understanding of Libyan decision-makers about the country's image they believe that the country's negative image is a thing of the past and that Libya's image has now changed abroad. The study could not find any Libyan marketing efforts to improve its image abroad and neither the GPC nor GBTTI had considered this issue seriously. The only marketing activity that the GBTTI had been involved in was participation in the London International Travel World Market, and the World Wide Web, and even this was described by tour operators as ineffective.

Unless the appropriate people are appointed to positions of authority, which will then make worthwhile decisions about tourism, Libya will struggle and be unable to compete in the MENA market. Enhancing the poor image is not an easy task and will take time and effort. The GBTTI needs to allocate sufficient finance for budgets to develop the country's image abroad and to adopt appropriate marketing strategies for different markets and tourists. Morgan *et al*. (2003) assert that branding is a powerful weapon in destination competitiveness. Libya therefore needs to develop its destination brand, identifying its comparative advantage and turning it to competitive advantage.

Tour operators and travel agencies are significant sources of information and are familiar with the distribution channels that influence the images and decisions of potential tourists (Baloglu and Mangaloglu, 1999). According to Reimer (1990), Tour operators and travel agencies do not merely serve as channel distributors, but also as image creators. Libyan Tour operators must therefore be supported both financially and educationally to be able to enhance the country's image abroad and to influence

potential tourists. Govers *et al.* (2007) identified the main source of image information as television, travel (elsewhere or by region), word-of-mouth communication, magazines and the internet. The GBTTI should focus upon these areas, because of the audience percentage (see Chapter 4). However, word-of-mouth communication by friends and relatives is the most important source of information image (Baloglu and McClear, 1999), and constitutes the highest level of trust as a source of information (Marketing Chart, 2007). It has been shown that this form of communication is four times as effective as TV advertising and is five times more effective than the communication of magazines (Fresh Networks, 2009). Thus, it is recommended that the GBTTI and Libya's tourism stakeholders (including Tour operators and hotels) should focus on providing tourists with a pleasant experience in order to develop a positive image for potential visitors and increase loyalty.

8.4 Destination accessibility

Destination accessibility includes the procedures for obtaining a visa and any obstacles that the tourist may face at entry points. Acquiring a visa to visit Libya is not easy, particularly for individuals, and is not as simple as it is in the competitor countries. This is due to muddled decisions about obtaining a visa, translating passports and entry regulations. On 17 November 2007, Libya launched (with immediate effect) a new travelling requirement for all travellers to Libya, namely the need to ensure that they had a page translated into Arabic in their passports; this was instigated without any previous declaration or announcement. From the evening of 11 November 2007, visitors without an Arabic translation on their passports were denied entry to Libya, even if they had valid visas. Libya is the only Middle Eastern country to take such a step. Again the

latest, although probably not the last the recent procedures taken on 16 February 2010, when Libya denied European Schengen citizens entry to the country, as a result of the political issues between Libya and Switzerland. This is manifestly a strange decision and demonstrates that tourism is not a priority for Libyan decision-makers. The new procedures relating to an Arabic translations page on foreign passports had a negative impact on the tourism industry. According to the GBTTI statistics, the number of international arrivals declined by 15% in 2007 and more serious implications are likely to emerge in relation to tourism if Libya does not reach to an agreement with European Union Schengen countries.

Libya faces enormous challenges in regulating immigration and visa procedures. A remarkable number of people enter the country without any documentation from Niger, Chad and Sudan. Additionally, a significant number of people come to Libya as job seekers from Egypt, most of whom have no money to spend. Yet European tourists often come though tour operators and everything is paid in advance to the agent. Tour operators arrange the visas for their tourists, by applying for permission from the Immigration Department, and the tourists then receive their visas when they arrive at the airport. However, individuals and hotels consider the procedures complicated. British tourists interviewed stated that they have had to wait for more than an hour in a queue to have their passports stamped and that the staff do not speak English fluently.

Libya should therefore consider its economic and tourism interests and cancel the law requiring foreign tourists to have a page translated into Arabic in their passports, they should also develop the immigration staff by appointing qualified people to posts and

conducting external training courses, particularly in relation to English language competence.

8.5 Supporting resources

Murphy *et al*. (2000) state that the level or lack of appropriate facilities has a significant impact on the experiences of tourists and the services they received. Supporting resources can take many forms, including accommodation, transportation and infrastructure and the facilitating resources as will be discussed below.

8.5.1 Accommodation

Accommodation is the largest and most important sector in the tourism industry because most tourists spend the greatest amount of their time in hotels as well as a high proportion of their expenditure (Sharpley, 2006). According to the GBTTI statistics, the total number of hotels, rooms and beds has increased (see Table 8.1).

Table 8.1: Libya's accommodation capacity

Item	1993	2006
Hotels	118	230
Rooms	8790	13215
Beds	10250	24230

Source: GTBBI (2009)

Libya's 230 hotels and 13215 rooms compares with 984 hotels and 138,471 rooms in Egypt (EHA, 2007) and 470 hotels and 21,587 rooms in Jordan. The statistics also show that the average number of rooms per hotel in Egypt is 140 rooms and in Jordan 46

rooms. In contrast, the average number of rooms of Libyan hotels is 57. Egypt had 130 five-star hotels in 2006 (EHA, 2007) and there were 32 five-star hotels in Marrakesh (Morocco) compared with one just five-star hotel in Libya. This leads to the conclusion that Libya needs to establish more five-star hotels with higher capacities to be able to compete internationally. The existing hotels in Libya also require major maintenance and upgrading in the short term.

Hotels are the most communally used type of accommodation in Libya. The private hotels are more reliable than the state (government) ones. It is notable that foreign hotels do not exist in Libya, and there are no big brands apart from Corinthia, such as Holiday Inn, the Marriott, Sheraton, Crown Plaza or the Hilton, which results in weak competition in the Libyan accommodation sector. Additionally, Libyan accommodation lacks international standardisation; four-star hotels in Libya are not equivalent to four-star hotels in the UK or elsewhere.

As regards quality, probably the Corinthia Bab Africa Hotel is the only hotel in Libya that has good quality service. Most of the hotels lack quality, particularly those based outside the capital. In general, as presented in chapter seven, the hospitality industry suffers from many obstacles, a large number of which relate to legislation, poor leadership and management, low salaries, a lack of skilled employees, the absence of support, seasonal problems and cultural impacts. In addition, because of the limited number of hotels in Libya, the government has forced some state hotels to accommodate government guests, conference participants or people attending

government meetings and this has resulted in the cancellation of tourist reservations, sometimes even forcing them to find alternative accommodation.

Hotels in the capital Tripoli are generally full for the whole year, while those in small cities and tourist destinations are full only during the tourist season with the average occupancy rate of the latter declines in the low season to around 30%. Hotel prices are determined by the GBTTI, which gives flexibility to hotels to select the most suitable prices from the maximum and minimum prices in the list according to the hotel's category. For instance the prices for four star hotels: '*the cost of a single room is 180 LD (£90) and double rooms cost 220 LD (£110)*' (Hotel2); '*prices vary; a single room costs 120 LD (£60), a double room is 150 LD (£75) and the suites are 220 LD*' (Hotel6). This seems 50 to 70% higher than Libya's competitor destinations (see Appendix E). Most hotels serve Libyan food as a buffet. The British tourists interviewed indicated that Libyan traditional food is delicious and appealing. However, the food in hotels is not high quality, there is no diversity and clearly alcohol is banned.

Hotels have learnt how to deal with tourists from their experience, but they have not identified their customers' wants and needs, which has led to misunderstandings on both sides. For instance, while Libyans see providing plenty of food as a firm gesture of welcome and generosity, tourists see this as being impolite. The vast majority of hotel chefs come from neighbouring countries and some roles in the service sector are still not acceptable to Libyans as possible employment. This is particularly the case in rural areas where they do not like to work as waiters, in housekeeping or the kitchen service. It is also considered inappropriate for women to work in the hospitality sector.

The accommodation sector is nevertheless the most important supporting resource for the tourism industry, and (as already stated) tourists spend most of their money on this. Additionally, the accommodation sector also generates employment opportunities for local people. Tourists spend a considerable amount of time in their accommodation, relaxing, being entertained, eating and sleeping, therefore, it is important that they are satisfied, that they have a good experience and that their expectations are met.

The key to the success of Libyan hotels is therefore to concentrate on the quality of the service and to develop human resources (including foreign languages competence) by participating in external training courses which have been found to be more effective than local ones.

8.5.2 Transportation

Various forms of transportation operate in Libya: planes, ships, cruises, coaches, buses, taxis, private cars. Trains are not yet in operation but there are plans afoot to establish seven train lines, which should be operational by 2011. Libya has a good road network of 83,200 km, 47,590 kilometres of which are surfaced (GPC, 2007), and these link Libya with its neighbouring countries. There are also 22 airports in the country, but the main international airports are Tripoli, Benghazi and Sebha. Until UN sanctions were lifted in 2003, there were no flights into or out of Libya. British Airways was the first international airline to re-establish a direct link between Tripoli and London (George, 1999). The study established that British tourists use British Airways in preference to Libyan Airlines which is unreliable and irregular. The government has also failed to

improve the Libyan Airlines services, so tour operators need to use foreign flights or hire aircraft in the peak tourism season.

Cruises offer another transportation method for tourists to visit Libya, but since the new regulation of asking tourists for a page to be translated into Arabic in their passports, the number of cruises declined sharply in 2008 and 2009 (TourOp1). According to the Middle East Broadcasting Center (MBC), two British cruisers landed in Dubai on 2nd November 2009 with more than 2,000 British tourists onboard. This number is close to the total number of British tourists visiting Libya in a year. Additionally, Libyan ports have a low capacity and lack tourist facilities.

The buses in Libya are of good quality, being comfortable and air conditioned but they do not meet tourism demands, because they are limited. However, it should be pointed out that buses and taxi fares are cheap. A major problem is that Libyans drive recklessly and do not respect traffic rules. For this reason, car hire is not recommended and it needs to be explained to tourists that pedestrian crossings are not safe for crossing roads.

Focus group members (non-visitors) expect there to be good transportation networks within the cities. The transportation network outside the cities are not as good and some people still use camels in the villages. There is a shortage of tour buses as well as tour transportation companies to meet the tour operators' demands. It is therefore recommended that the GPC of Transport and the GPC for Justice should integrate their efforts to control the roads and encourage drivers to respect the traffic laws, in order to

protect the lives of locals and tourists and improving the destination image. Private sector can play crucial role to improve transportation sector, if the government paid little attention in this way.

8.5.3 Infrastructure

Infrastructure is big subject and therefore it is deemed appropriate here to focus on the infrastructure that relates to the tourism industry, such as with roads, airports, public amenities, tourist signs, electricity and communication systems. This is an area of great concern in Libya and within the focus group four of the British people spoken to in the UK expected Libya to have as good an infrastructure as Dubai. According to the statistics of OPEC, Libya exported 1.6 million barrels of oil a day in 2006, which rose to 2 million barrels in 2008; combined with a low population of 5.6 million, this situation has enabled Libya to make a huge financial surplus. If these revenues were spent on developing the infrastructure of the country it would remove Libya from the list of developing countries.

Unfortunately, Libya has chronic difficulties in managing its financial resources and this is accompanied by a high rate of corruption; according to the International Transparency Organisation (2005), Libya rated as number 131 in a list of 138 corrupt countries. Developing the infrastructure is the dream of all Libyans, but this dream is evaporating in a murky world where unqualified employees are appointed to leading positions and there is mismanagement at all levels.

Ammar Eltayef, the secretary of the GBTTI, has indicated that Libya has a huge potential for tourism, but lacks the infrastructure, merely promoting Libya's tourism products on its own is not enough (Dabrowska, 2005). Steinmetz (2004) has also reported that Libya's tourism infrastructure has a long way to go before it can compete with its neighbours. In November 2007, Libya announced plans to spend approximately US$ 123 billion on public works over a five-year period. This would engender a tremendous demand for contract services and construction materials in the coming years to support the major projects for roads, large-scale office complexes, hotels, resorts and residential housing projects (Huot, 2009). According to the GBTTI, tourism investment in Libya attracted more than 73 national and foreign investors in 2007. Moreover, the GBTTI signed 21 contracts with national and foreign investors to execute tourism projects, including the building of hotels, tourist resorts, complete tourist complexes tourist cities and villages (GBTTI, 2008).

It is noticeable that there is an absence of comprehensive planning in Libya; indeed the country could be used as case study for poor planning and management. Hence, there is little point in establishing a five-star resort where the basic infrastructure does not exist. There is also total agreement among the tourism stakeholders that Libya's infrastructure is poor, notwithstanding recent developments. Moreover, some Libyans debate whether the government could establish a competitive infrastructure because of the absence of good planning and management as well as the existence of corruption and political intervention.

British tourists have emphasised the importance of improving the infrastructure and tourism facilities, without losing the friendly hospitality and traditional values of the country. Clearly, the destination planners should take into account the need to protect the culture and heritage. Tripoli International Airport is presently under development to increase its capacity and improve its services. The roads are adequate, but the signs are very poor and only written in Arabic. British tourists have also pointed out that public toilets are very limited in Libya, and those that exist are in a miserable condition: Tour operators prefer to use hotel and restaurant toilets on the motorways, as public toilets lack toilet paper and dryers for Western tourists.

Landlines, mobile phones and the internet are the main tools of the Libyan communication system; the landline phone network does not work effectively, but mobile phone networks are good. However, communication by internet is still limited and inadequate. Visa and credit cards can be accepted, but only by the Corinthia Bab Africa hotel or Al-Aman Bank machines, and this service is not available in all the other hotels or in the shops, restaurants, cafés or airlines. Libyans wish to see the country developing while it has the financial resources, and it is probable that Saif al-Islam, Qudaffi's son, has the best programme for Libya's future in this regard.

8.5.4 Facilitating resources

The study revealed that British people are concerned about their safety and security in the tourism destinations (see Chapter Six). In Libya, an authority for tourism police was established in 1997 to protect tourism attractions as well as tourists. The study explored the enormous challenge of Tour operators and the tourism police department; Libyan

tour operators have described tourism escorts as being complicated and costly. Furthermore, tour operators pay the tourism escorts' expenses, including their accommodation, transportation, meals and 150 LD per trip. Although the tourism police department takes restricted legal action against tourism escort offences, the tour operators are afraid to complain about the police. Such fears probably have some foundation when, as was experienced by the researcher, the head of the tourism police department rejects criticisms about his tourism escorts.

The study therefore recommends re-engineering and empowering the tourism police authority so that it is able to protect the heritage, antiquities, monuments and historical manuscripts, whilst also keeping the tourists safe. As regards safety and security issues, Libya is one of the safest tourist destinations, not only in the MENA region but in the world at large. This fact was established in a survey conducted by an international insurance broker Aon, which found that Greenland and Libya were the world's safest destinations in 2004 (Temehu, 2006). '*Libya is very, very safe*' said Janet Moore, president of Distant Horizons (Engle, 2004). Libya has made a good impression on British tourists regarding personal safety and security in the country. Notwithstanding this, as evidenced in the focus groups many British people still view Libya as a dangerous destination.

Tourists require information about destinations before their trips as well as during their visits. British non-visitors anticipated that there would be sufficient information on the internet in addition to printed materials about tourism in Libya. However, the British tourists interviewed in Libya clearly had never seen a poster, brochure or advertisement

about Libyan tourism in the UK market. They had re-used old guide books. In addition, no maps were available in Libya, but the tour leaders and guides were found to be a good source of information.

The entertainment industry provides the travel and tourism in Libya, with special facilities for tourists to have fun and excitement time. According to Ritchie and Crouch (2003), entertainment includes cinema halls, gambling machines, video games, theatres, night clubs and national parks. However, because Libya is an Islamic country, some forms of entertainment are forbidden. It would however be possible to develop cultural entertainment centres. In the study, it was observed that there was a big gap in this area and there is a need for considerable work in the field, which also requires collaboration between the private sector and the government.

British tourists like a mixture of activities on their holidays, including the possibility of shopping and buying souvenirs (FG4). Libya has some traditional markets and numerous shops scattered across the country, but many of the shops and markets are full of Egyptian and Chinese products and lack organisation due to the absence of urban planning. However, the tourists feel free to shop without being hassled or asked for money from locals, although some cases of this have been observed with illegal immigrants from other parts of Africa.

8.6 Comparative advantage

Comparative advantage includes the core resources of tourism products; core resource components are those factors that motivate the tourist to visit a destination, such as

natural resources, heritage, culture and created resources. Although Libya has unique natural resources, heritage and culture, according to the Tour operators, tourists visit Libya for two main reasons, namely Greek and Roman antiquities and adventure tours in the desert. However, the comparative advantage is insufficient to attract large numbers of foreign tourists for sustainability and the destination need good supporting resources, such as efficient planning and management, and effective marketing/promotions.

Libya has a variety of significant tourist attractions across the country, including stunning landscapes, virgin beaches, green mountains, lakes, desert, intact Greek and Roman cities, old Islamic cities and the remains of prehistoric civilisations; it also possesses five UNESCO World Heritage Sites (Leptis Magna, Sabratha, Cyrene, Gadamas and Tadrart Acacus) (GBTTI, 2009). '*Libya's beauty and diversity are still relatively unknown and, as a result, the country remains largely unspoilt*' (Columbus Travel Media, 2009, p.2).

An important issue that emerged in the study is that British non-visitors (presented in focus groups 3 and 4) did not know about Libya's natural resources, heritage and culture and this included its historical sites, ruins and archaeology. Because of this lack of awareness, the group also demonstrated an ignorance of Libyan cultural festivals, events and family holidays, which made it impossible to make a comparison between Libya and its competitors. In fact, the British people interviewed in the focus group seemed to know more about Egypt than all the other destinations in the MENA: '*we recognise that Egypt has a lot of historical sites and places to visit*' (FG3C3). Potential

British visitors perceive the following comparative advantage of Libya: it is hot, it has a desert and a similar culture to the other MENA countries. Moreover, Libya is seen as a Muslim community and Ramadan is recognised as a cultural event.

8.6.1 Natural resources

Natural resources include lakes, rivers, oceans, seas, forests, deserts, rural and urban areas, air quality, scenery, flora and fauna as well as other physical assets (Dwyer and Kim, 2003). Destinations that have one or more favourable and unique physiographical resources have a strong position from which to compete by employing such advantage (Ritchie and Crouch, 2003). Libya offers a pleasant climate and a variety of unique natural resources, such as its clean sea, golden sandy beaches, the huge desert, green mountains, as well as its stunning oases and lakes. Notwithstanding Libya's unique natural resources, the study showed that these assets are not maintained or marketed well. An example of this can be seen in the fact that the majority of participants in the focus group interviews were unaware that Libya has a coastline and assumed that because Libya has not yet been considered as tourism destination, the beaches would be cleaner and less crowded.

Libya's climate is varied. The climate in the south is very much influenced by the great Sahara, whereas in the north there is a Mediterranean climate. In the winter, the northern coastal area and mountains are considered to have a moderate climate, although there is some snowfall in the mountains and the temperature average at about 5˚C. In summer, Libya is a hot destination and the temperatures reach a peak in August of over 40 degrees. However, the average temperatures are between 30˚C and 35˚C and

rain does not usually fall in summer (GBTTI, 2008). In the study it was established that the tourist season begins in late September and continues until 1st May, and Libya's beaches are not exploited because tourists (particularly those from the West) avoid the summer period.

The desert constitutes more than 90% of Libyan territory and has many tourism attraction landmarks. These are of special interest and provide adventure to tourists; they include prehistoric art, lakes, particular buildings in the villages and habitations in the oases (GBTTI, 2008). Libya is the northern gate of Africa and is open to the Mediterranean Sea, with the coastline extending for 1,770 km. The Mediterranean Sea is clean with warm water and there are golden sands. Nevertheless, Chapter seven provides photos showing the real condition of Libya's beaches, some of which are in a terrible state: many are dirty and some are polluted by sewage. Up until 2009, no attention had been paid to the beaches in Libya, nor had they been considered for their use in tourism. In late 2008 and 2009, the GPC signed a number of contracts to establish modern resorts along the coast, but it is far from certain whether the GPC intends to develop the beaches or wishes investors to do this.

8.6.2 Heritage resources

According to Sigala and Leslie (2005), the word 'heritage' derives from the word inheritance, which means the transfer of historical value from one generation to another. Libya has a varied and valuable heritage that was left by ancient civilisations that lived there, including Phoenicians, Byzantines, Greeks, Romans, Ottomans, Italians and Islamic civilisations. All of these civilisations have left valuable remains that reflect

their lifestyle and cultures. Moreover, Libya had a pre-historical civilisation, dating from about 15,000 BC. These treasures are well preserved and some of them count among the best in world heritage.

This study focused on the five UNESCO World Heritage Sites of Leptis Magna, Sabratha, Cyrene, the old city of Gadamas and Tadrart Acacus). Chapter five presented these UNESCO World Sites in detail, while chapter seven revealed that even these five UNESCO sites are not well maintained or protected. The study recommends establishing a comprehensive investigation about the neglect and lack of maintenance of Libya's cultural heritage. Such investigations should also involve UNESCO experts. This study also invites all the tourism stakeholders, including the government, to intervene and make urgent action plans to protect the antiquities, monuments and historical artefacts.

8.6.3 Culture resources

Culture and history play a significant role for tourism destinations. According to the English Longman Dictionary, culture constitutes the beliefs, ways of life, art, and customs that are shared and accepted by people in a particular society. Thus, it is concerned with people's lifestyle, beliefs and behaviour in a particular destination for a particular time. Ritchie and Crouch (2003) argue that local cultural history should not be changed or altered for tourism development purposes. Since tourism exports culture to others (Hotel8) and tourists are very keen to experience other cultures (FG2), culture is a significant factor in tourism industry. The study addressed the way in which Libyan

culture influences tourists such as in the areas of religion, tradition, special events, dress, food and drink (including the ban on alcohol).

Libya is typical of an Islamic country, as the life of Libyans is organised according to the rules of Islam. Libyan culture is also rich and diversified; this includes architectural forms and modes, museums, food, music, festivities, local folklore songs and dances (GBTTI, 2008). Additionally, Libya has a variety of traditional cultures, and the eastern area has different songs and wedding dances from the western and northern areas; this gives Libya a rich diversity of local folklore and cultural events. Some international cultural festivals run annually, such as the Gadamas, Ghat Drij and Hun festivals, where tourists enjoy and experience Libyan culture. However, Tour operators have noticed that these events are not effective because of poor organisation and corruption.

Hence, it is suggested in the study that international events should be organised by private tourism businesses or foreign investors. British people are unable to recognise any specific cultural aspects and events relating to Libya and they rightly consider that since Libya is part of the Arabic and Muslim community, it celebrates festivals such as Ramadan and Eid (FG4).

The researcher argues that since September 11th, 2001, new movements have emerged through terrorists and radical extremists and some analysts have linked these groups with religion. Hence, the researcher investigated to find out if the Libyans harboured any radical Islamic attitudes towards foreign tourists. What emerged, however, was that Libyans are welcoming towards tourists and are happy to exchange experiences with

them and learn their languages. Moreover, Libyans point out that their religion invites them to respect others, even if they are different.

British non-visitors believed Libyan food to be quite spicy. However the British tourists found the traditional Libyan food was delicious, even though they did not classify it as high quality food and missed having diversity in the menus. Three critical issues also emerged in the study. Firstly, there is a lack of Libyan chefs in the tourism and hospitality industry. Secondly, there are misunderstandings about the cultures of the tourists and local communities regarding acceptable quantities of food and the times at which to eat. Thirdly, few restaurants meet appreciate hygiene standards and the researcher himself has had bad experiences in this regard, as indicated in chapter seven.

Alcohol is prohibited in Libya and the tourists who had visited the country were aware that it is not allowed by law. Alcohol is part of the Western lifestyle and the majority of British people drink alcohol at least once a week. Consequently, Libya is not a favoured destination for many potential tourists, especially young people. However, some British tourists indicated that they could cope with a situation with no alcohol. Other tourists considered that non-alcoholic beer which is available in Libya was a good alternative. Resident interviewees suggested that Libyans divide into two groups: one group believed in developing Libya as a tourism destination that should allow the drinking of alcohol in specific places, such as five-star hotels; the other group argues that the country can be developed as tourism destination without alcohol, since they are keen to protect their religion and culture from any change.

8.6.4 Created resources

Created resources are attractions that have unique or exotic features; they may not necessarily be tourism attractions, but can be used for tourism purposes, such as the Al-Khalifa Tower in Dubai (the world's tallest structure) and the Bird's Nest Stadium in Beijing (the world's largest stadium). The only project which can be used as a created resource for Libya's tourism industry is the Great Man-Made River, which conveys 6.0 million meter super square of natural water daily from the desert in the south to the north, crossing about 4,000 km; the water is carried through huge pipes, four metres in diameter (Frysinger, 2000). The Great Man-Made River is the biggest and most expensive construction project in Libya and most of Libya's formal guests have visited this project.

8.7 Local communities

As mentioned in chapter 4, little attention has been given to local communities in tourism development. However, a number of scholars have raised the problem of the impact of tourism on these communities and highlighted the importance of the involvement of local communities and their participation in the decision-making process for tourism development. In this regard, Shaw and Williams (2000) demonstrated that tourism has significant impact upon local communities with changes in social characteristics and behaviour, local language, the locals' health and religious changes.

Libyans see tourism as a potential industry which would provide employment opportunities and be a vital source of income as well as a chance for locals and tourists

to learn and experience different cultures. Tourism is a window to foreign countries; it can also be used as a tool for enhancing destination image. However, it is a double-edged sword: if destinations do not manage and control their tourism well, then it may harm and destroy the destination. Hence, the potential negative impacts must be considered, particularly in the planning stage. In addition, there are sensitive issues that have not been dealt with well in Libyan tourism development, such as the matter of alcohol and the attire of the tourists.

Bjorkland and Philbrick (1975) produced a dynamic framework that interprets the host community members' attitudes and behaviour towards tourism using a matrix; this indicated the movement of the locals from active to passive and from positive to negative. However, the most risky situation is when residents become active and have a negative attitude towards tourism. This usually happens when local communities are not involved in tourism plans or projects and they are not benefiting from tourism. Leslie (2005, p.133) suggests that:

> *In terms of the promotion and development of cultural tourism, empowering the community through effective participation in the planning processes is seen as essential to sustaining the cultural heritage and is thus a contributory factor in progress towards sustainable development.*

Hall and Richards (2003) believed that local communities can be part of the tourism problem and can provide potential solutions for sustainable tourism development. Dwyer (2001) asserts that the friendliness of the local population and attitudes towards tourists are important. Heat (2003) adds that the willingness of residents to provide assistance and information to visitors plays a positive role in destination competitiveness.

The British tourists interviewed indicated that Libyans are spontaneous, honest, helpful and friendly, even though not all of them benefit from tourism directly. In contrast, the British non-visitors had a negative image about Libyans, and considered them to be less friendly than Tunisians and Moroccans. In this matter, what makes Libyans different is that they do not hassle the tourists or ask for money or tips.

Arabic is the first language in Libya and probably English can be considered the second language, albeit at a very basic level. Although the English language is a subject in Libyan schools, there is no particular focus on it. Therefore, British tourists may experience difficulties communicating with locals unless they are travelling as a tour group and the tour leader provides translations. The British non-visitors did not expect people in the tourism destinations to speak English and those who do visit, still go to destinations where the locals do not speak English. In addition to this, the handicraft industry is suffering due to low demand and the absence of government support and consequently many locals have left the industry. In addition to this, local products cannot compete with the Chinese and Egyptian products.

The Libyan political system allows all Libyans over 18 years to participate in the basic congresses to discuss local and national issues, including tourism policies. However, practical decisions relating to tourism and the plans for it are centralised and decided by the GPC and GBTTI. The study revealed that neither locals, nor tour operators nor even hotel managers are involved in tourism development, and this includes the NTDP. This is the main reason for the planning failures with tourists merely perceived as adding extra wealth to the economy. The researcher suggests that all the stakeholders should be

involved in tourism development, and the local culture, language, religion and traditions must be taken in account in sustainable tourism development.

8.8 Destination planning and management

Planning and managing destinations are not easy processes and rely on the political, social and economic systems of the destination. Chapter Four sets out a successful model for destination planning and management: the model, developed by the Australian Board of Tourism Development, can be applied to Libya. It consists of three dimensions, namely destination development planning, destination marketing and destination management; destinations focusing on gaining a competitive advantage should therefore integrate these three dimensions effectively.

8.8.1 The role of government for tourism development

According to the Declaration of the Establishment of the People's Authority in 1977, which set out the structure of the Libyan political system, the people exercise their authority through the people's committees, people's congresses, unions and professional associations and the General People's Congress. There is a system of direct elections, citizens decide on their own Basic People’s Congress and general committees execute the national decisions (UMA, 2007). However, neither the Green Book nor the Declaration of the Establishment of the People's Authority determine the form of the GPC or specify its duties and responsibilities; they merely execute the General People’s Congress resolutions. Since 1977, the Libyan People’s Congress has changed its structure as well as the basic congresses, moving between centralisation and

decentralisation. This has also occurred at a time when there has been a lack of leadership.

For example, the legal tourism body sometimes integrates with cultural departments and sometimes with traditional industries. In 2001, this body was named the GPC for Tourism (Ministry of Tourism). However, in 2006 it ceased to be a Ministry and emerged as the GBTTI (this being an independent state organisation). The contradictions and challenges of this led to the loss of information, the absence of universal planning and an inability to implement and control the plans and projects. Nevertheless, the people in control consider that the continuous change in the government structure does not affect government performance, when in fact, the opposite is true; it has a direct and negative impact which they do not acknowledge. As discussed in chapter seven, most of the Libyan tourism stakeholders (including tour operators, hotel managers and residents) are unhappy with the achievements of the GPC and the GBTTI and many Libyans question why the infrastructure is still poor when Libya has a surplus of financial resources due to the recent increase in oil prices.

Despite recent economic reforms and the potential investment in the tourism industry, foreign investors and the private sector are very apprehensive about investing heavily in the Libyan tourism sector due to the political and legal environment. As Anthony Layden, the British Ambassador to Libya, stated in an investment conference:

> *You cannot easily see who in government is responsible for a subject, who takes decisions on it, and on what grounds. A secretary? A committee? A state authority? The chairman of a state enterprise?*
>
> (Abdulmajid, 2005, Online).

Jenkins (2006) highlights that state or government involvement in the tourism industry relies upon the industry potential and the type of state and its government. It can therefore be concluded in this regard that the tourism sector is part of a complete system; anything that goes wrong with the system, including the GPC, the General People's Congress and the Justice Authority will directly or indirectly affect the tourism industry. The researcher strongly believes that the development of the tourism sector cannot be achieved unless the whole system is improved simultaneously.

The GPC for Tourism with the cooperation of the United Nations World Tourism Organisation (UNWTO) published a tourism master plan for the country in 1998 called the National Tourism Development Plan (NTDP). This aimed to:

> *Provide the Great Socialist People's Libyan Arab Jamahiriya with a realistic and implementable base for the development of the sector through the establishment and promulgation of a policy framework, short and long-term objectives, supporting strategic guidelines and a five-year action programme from the period 1999 to 2003.*
>
> (NTDP, 1998, p. I)

Chapter Five demonstrated that the NTDP was prepared by a team from England; this was of a very good standard but it seemed to be a theoretical framework rather than a practical one. Details of the plan concerning how it was to achieve its objectives were not explained; it also covered a large area and discussed issues in general. The GBTTI spent further large sums of money preparing a new tourism master plan, this being conducted by a Libyan team. The study found that a small part of the old NTDP which considered developing the old city of Gadamas had been implemented. When the manager at the GBTTI was asked about the reasons for ignoring the old NTDP and publishing a new tourism master plan, he emphasised that the old one had been

prepared under different circumstances (meaning under UN sanctions) and made clear that the situation had changed. Significantly, none of the tour operators and hotel managers who were interviewed had any idea about the NTDP and therefore none of them had been involved in the preparations of either the old NTDP or the new one.

The study also explored other significant issues in relation to developing Libya's tourism industry and the following facts were established:

1- The antiquities authority is not a department of the GBTTI: this is a crucial issue and it is surprising how the GBTTI can develop the tourism industry without the antiquities and monuments being under its control.

2- Neither the GPC nor GBTTI support tourism businesses, including Tour operators and hotels; the absence of support for handicrafts was also noted.

3- There was a very small budget for tourism development, particularly for marketing and promoting the country abroad.

4- The GBTTI is incapable of managing international tourism events due to poor management, bureaucracy, corruption, a lack of leadership and experience; the eclipse of 2006 was a good example of this. Consequently, the study suggests that events' management should be given to private sector or foreign investors who are specialists in this area.

5- Tourism information and statistics in general are rare or unavailable, in addition to being unreliable. The GBTTI has no accurate statistics about the number of employees in the tourism sector or the contributions of the tourism sector to the GDP. Even more lamentable is the fact that the GBTTI does not have accurate statistics about international arrivals, merely counting the number international arrivals coming through tour operators. This means they ignore individual tourists and other types of tourists (Chapter Seven provided more detail about this).

6- Laws and regulations relating to tourism are confusing, particularly the ones demanding that foreign tourists should have a page translated into Arabic in their passports, and the requirements for the money that tourists should hold when they enter the country.

8.8.2 Tourism businesses

Tourism businesses (including SMEs) face different barriers in different countries. For instance, in Australia, small businesses in the tourism industry are affected by the increased use of the internet. Additionally, tourism businesses are characterised by a lack of awareness as well as resources, these problems include issues of time, staffing and money. SMEs are also unable to identify their competitive strengths besides lacking product standards and quality (OECD, 2007). Jones and Haven-Tang (2005) consider that many SMEs lack strategies, objectives, the required management skills and the implementation of an appropriate planning approach, these challenges also face Libya SMEs.

Probably some of the above-mentioned barriers facing Libyan SMEs are common to other country context, but because of the big gap between Libyan and Western SMEs, the researcher suggests future research should investigate the Libyan SMEs and determine the specific challenges that face tourism businesses in Libya. Tour operators and hotel managers' point out that they have not received any real assistance from the GPC, the GBTTI or any other organisation, such as the business incubators and the Development of Small Scale Industries. The study also revealed that tour operators follow developments in the tourism industry and therefore, the vast majority of tour operators are based in Tripoli because of the good internet and communication services. In addition, hotels have chronic difficulties mostly relating to human resources development and service quality, but private businesses have more flexibility to survive and compete in the tourism market. It was also noticeable that there is a lack of marketing and promotion strategies in all the tourism businesses, excluding the Corinthia Bab Africa Hotel.

8.8.3 Human resources development (HRD)

Governments and educational institutes should take responsibility for developing the knowledge and skills of the destinations' human resources and future needs (Ritchie and Crouch, 2003). Heathfield (2000) highlights how HRD is a framework that enables employees to develop their personal and organisational skills, knowledge and abilities.

Libya's total labour force is estimated at 1.6 million and some sources estimate the unemployment rate at around 30%, this primarily affecting the young (Library of Congress, 2005). According to the Arab Work Organisation, Libya is listed as the county with the fifth highest unemployment rate in the Arab World; the available

statistics also indicate that the unemployment rate in Libya was 17% in 2003, with 383,546 people looking for work (Al-Falah, 2007). Libya is going through a stage of moving from socialism to capitalism and the free market. This change has brought about particular challenges, including a mass of employees in the state sector and a weak private sector. However, statistics for the workforce and unemployment are inaccurate. Thus, this study cannot rely on the GBTTI statistics for the number of employees in the tourism sector. However, the study has achieved some progress in identifying the main challenges facing the hospitality and tourism industry in relation to human resources.

Haven–Tang and Jones (2006) argue that the negative impacts of tourism are that the tourism industry mostly provides manual jobs and the working conditions are poor, low paid and with long working hours. Additionally, the tourism industry is characterised by a lack of training programmes and high turnover.

Human resources development is a crucial issue in Libya's tourism development; unfortunately, the GPC and GBTTI have no plans for developing human resources in the tourism industry. Another study carried out by Naama (2007) emphasised the limited knowledge and implementation of the concept of a workforce plan in the Libyan hospitality sector. This is the result of a lack of cooperation between public and private sector in relation to the human resources (Reyes, 2009).

This study revealed that the tourism and hospitality industry is run according to the employees' experience and most of the managers, tour leaders and guides come from

different backgrounds. The tourism market is also associated with a shortage of qualified people and there is a huge demand for tour guides, tour leaders, chefs and marketers. According to Libya's tourism stakeholders, the Libyan education system does not focus on the areas of tourism and there are just three high institutes for hospitality which also do not meet the required standard (Hotel5, Resident6). '*So far we have not any institute or university for tourism'* (TourOp2). Moreover, due to cultural impacts, tourism and hospitality have remained unpopular preferences for Libyan students and are not looked upon favourably as forms of employment for women.

Tour operators and hotel managers have also raised the issue that most Libyan job seekers prefer to do administrative work and avoid outdoor and physical jobs. In 2007, the GPC of Higher Education established a number of tourism faculties which constituted a good step towards developing the tourism industry. However, the challenge at present is the lack of an appropriate curriculum and academic staff.

Chapter Seven, section (7.6.3) provided obvious evidences to conclude that Libya's tourism and the hospitality industry suffer from two main problems, in addition to the aforementioned difficulties. The first one is the lack of ability with foreign languages and the second is the absence of training courses. Due to a weak educational system, the majority of Libyans do not speak foreign languages fluently. As regards training courses, neither the GPC of Higher Education nor the GBTTI conduct courses to improve the workers' skills in tourism and hospitality. In Libya there are a huge number of private institutions in different areas and subjects, but none of them provide courses in the tourism and hospitality field. This has resulted in tour operators and hotels

conducting internal courses as an alternative solution. In the past, the GBTTI conducted some good training courses, particularly for tourism guides, but these courses were stopped and no one has addressed this question. The manager interviewed in the GBTTI, avoided addressing this question directly, declaring '*we have not stopped those programmes, and we will resume them in the future*'. It should also be pointed out that external training courses are expensive, require complicated procedures and often do not pass on their assessments of training needs.

Libya is not an exceptional destination as regards cultural influences on the work market. Tourism is an emerging industry and most Libyan families are originally Bedouin; even their behaviour is influenced by the desert and people in rural areas look upon working in tourism as being dishonourable work, particularly earning money by cleaning and serving others. The situation is worse still for women working in this field who are viewed with disapproval.

8.8.4 Environment issues

The travel and tourism industry is an important economic operator for many destinations, but it has a negative impact as well. According to Aronsson (2000), this includes the destruction of natural and cultural areas should they not be well preserved and protected. The Agenda 21 framework asked all governments and non-governmental organisations to implement specific actions to ensure success and guarantee the future of the earth. Undoubtedly, tourists have a crucial relationship with the physical environment and to analyse this, Gunn (1994) divided the physical environment into two categories:

1- Natural resources, including natural water and its biology, the flora and fauna of the land, the soil, geological formations, climate and atmosphere;
2- Cultural resources, including historical sites, other heritage, craftsmanship, traditions, organisations and settlements.

In the case of Libya, pollution, plastic bags, plastic bottles and litter are the first enemy of Libya's tourism industry. This pollution is caused not only by tourists, but by locals and SMEs. All the stakeholders pointed out the responsibility of the government through the GPC and Environment Authority for the poor environmental situation, particularly for the pollution of the sea and beaches. Here Libya is not qualified to talk about global warming or global environmental issues because it lacks the basic principles of hygiene and environmental protection; clearly, the Libyan government is unable to solve environmental problems. Chapter seven provided reliable evidence about this problem through the researcher's own photos. All the British tourists expressed their dissatisfaction with the litter in the tourist attractions, beside the motorways and at the access points to cities; tour operators see this phenomenon as a stigma for the government.

8.8.5 Marketing strategies

According to the GBTTI statistics, the main tourist markets for Libya are Italy, France, Germany, the UK and Malta. These also include Egypt, Tunisia and Morocco, which are not included in the GBTTI statistics (as discussed earlier). The study revealed that no study or research is being conducted in Libya to identify tourists' requirements. Therefore, tour operators and hotels have dealt with tourists according to their limited

experience which has led to critical problems and misunderstandings. When a manager in the GBTTI was asked about if they identified what their customers wanted, he replied '*from our experience, we know that the English are fussy, and expect to get everything for £10, unlike other nationalities*'. The researcher then asked a British group of tourists if they are satisfied and enjoyed in Libya. They explained that they were very happy with the attractions, but some issues annoyed them such as functioning taps, windows, lifts, telephones, breakfasts etc. A good example of the consequences of ignoring customer needs and wants was mentioned by one British tourist who indicated that Libyans provide unnecessarily large portions of food. He emphasised that this behaviour is unusual in Britain. Further to this, the toilets in Libya do not have toilet paper.

The NTDP (1997) plan has three strategic marketing objectives:

1- The creation in the major tourist generating markets of the perception of the Jamahiriya as a destination;

2- The provision of a diverse range of natural and cultural resources that will appeal to and attract a range of tourist types and market segments;

3- The provision of a location for tourist activities that is welcoming, relaxing and free of any threat to personal safety.

It was indicated in the NTDP (1997) that in order to achieve these aims a programme of marketing activities is required. It should be emphasised here that the NTDP (1997) is an extensive report providing guidance as well as theoretical ideas and is not a practical programme for adoption. In fact, throughout the investigation process of the study, no

clear strategic marketing plan for Libya could be found for target markets, potential tourists, or a positioning programme. The study explored two marketing activities adopted by the GBTTI and tourism businesses. The first one involves participation in international exhibitions, such the London Travel Market; the second one utilises the internet to attract foreign tourists. All the Libyan tourism stakeholders agreed that the country must employ focus differentiation (according to Porter's classification), which means targeting specific types of tourists and not mass tourists such as those of Libya's competitors.

Despite that fact that Libya has an image problem abroad, particularly in Western countries, the GBTTI has not made any effort to enhance the country's image. The literature review contained an extensive discussion about the concept of destination image, the components of destination image and the relationship between the destination image and the travel decision process, which indicated that tourists act upon their impressions, beliefs and perceptions of certain destinations rather than objective reality. The British non-visitors interviewed had no idea about Libya's tourism product and culture: they only had a negative image of the country. This is clearly the result of the political fallout and conflict between Libya and the West from 1970 to 2003.

Echtner and Ritchie (2003) suggest that a destination must be favourably differentiated from its competitors or have a positive image in the minds of potential consumers. Therefore, whilst Libya continues to be seen in the West as being associated with terrorism, it is not expected to be on the list of holiday destinations for potential British tourists. The study therefore recommends that the GPC and GBTTI, in coordination

with tour operators, must allocate an adequate budget to enhance the country's image abroad as well as to implement an effective marketing programme. Competing on the international tourism market is complex and requires flexibility with decision-making processes; this will enable destinations to act quickly according to changes in the global environment. Destination brand is another emerging concept which aims to differentiate destinations from their competitors. Hence, Libya also needs to develop a destination brand of its own. The researcher considers that destinations should use comparative advantage elements for their destination brands, such as natural resources, landscape, heritage, archaeology, culture and created resources.

An investigation was made in the study to establish whether Libya is a cheap or expensive tourism destination compared with its competitors. The results indicated that although it is a cheap country, it has expensive tour packages. The researcher attributed this paradox to three main reasons: firstly, there are no charter flights linking tourist markets with Libya; secondly, there is a small degree of competition between the tour operators and hotels in Libya; thirdly, the tourists' book through their local tour operators and the foreign tour operators then makes arrangements with the Libyan tour operators. Consequently, most of the revenue goes to the airlines, foreign tour operators, local Tour operators and the hotels.

8.8.6 Service quality

The study revealed that most hotels restaurants and cafés do not have quality service, and the public ones do not meet hygiene requirements. The infrastructure, including banking and telecommunication systems also remain undeveloped and need to focus on

quality. Clearly, service quality is a key to gaining a competitive advantage in the MENA, and extensive training courses are an appropriate way to improve this; the GBTTI must also establish a department for quality assurance to improve quality service in the entire industry.

8.9 Global environment

Destinations can be exposed to external environmental forces; the basic external forces can be identified through PEST analysis. Some scholars extend these to include ecology or nature and competitors. However, this study divides the global environment into the local environment, the regional environment and the international environment. These external forces have a significant influence on international arrivals and tourism activity. However, measuring the impact of these forces is a difficult task due to their complexity and interaction.

The reader should note that this study was not designed to measure the global environment, but it does highlight the impact of external forces on tourism development. The GBTTI must therefore continue to monitor the global environment and take appropriate action according to those changes.

8.10 SWOT analysis

According to Chapman (2009), the SWOT analysis was derived from research conducted by Albert Humphrey at the Stanford Research Institute from 1960 to 1970. However, Halan *et al*. (2006) argue that the SWOT scoring analysis was proposed by Flavel and Williams in 1996 and is a valuable basis for evaluating the relative

significance of a particular destination or a market. The researcher inclines more to the Chapman (2009) narrative rather than that of Halan *et al*. (2006). In fact, the SWOT analysis, while focusing upon the strengths and weaknesses of tourism destinations, also looks for the potential opportunities and threats that may face the destinations in the future. This study gathered all the Libyan tourism stakeholders' beliefs, opinions and suggestions in order to highlight the strengths of Libya as a tourism destination; such sources of strength can be used to differentiate Libya from its competitors.

Strengths:

1- Libya is a rich country and has a diversity of unique tourism attractions; it has experienced the great civilisations of the Phoenicians, Greeks, Romans, Byzantines, Arabs and Ottoman rule, as well as that of Islam from the 7th century. Libya has vast and varied landscapes, from the Mediterranean Sea and the Green Mountains to the endless Saharan sands (Bradley, 2009). This includes the five UNESCO World Heritage Sites: Leptis Magna, Sabratha, Cyrene, the old city of Gadamas and Tadrart Acacus.

2- Libyans are completely different to other Arab nations in the MENA region; the people who in contact with Libyans, such as tourists, know that they are courteous, friendly and helpful as well as being keen to talk to tourists. Moreover, Libyans do not hassle tourists or ask them for money or tips.

3- Libya is one of the safest destinations; all of Libya's competitor destinations have seen terrorism attacks and explosions, and Libya still remains safe from extremist violence and terrorism organisations.

4- The climate is suitable for culture and adventure tourism in winter and wonderful for leisure and recreation in the summer, and therefore can be exploited for many types of tourism and reduce the need for seasonal tourism.

5- Libya is an oil-producing country with a small population; this enables the country to gain surplus financial resources which can then be employed to develop Libya as a unique tourism destination.

6- Despite the debate about the education output in Libya, Libyans are the second best educated people in Africa; according to Lagga *et al*. (2004) the Libyan literacy rate is 80.8 percent of the total population, with 91.3 percent for males and 69.3 percent for females.

Libya has a real chance to be an internationally-competitive tourist destination and many Libyans believe the country deserves to be one of top tourism destinations in the MENA.

> *Libya can be the number one tourism destination in the southern Mediterranean within a decade. We have the resources, we have the money to build great infrastructure, we have beaches that nobody else has in all the Mediterranean countries, we have great desert, we have a great archaeological heritage which is one of the best in the whole world, we are only second to Egypt when it comes to the quantity and quality of our archaeological heritage in the Mediterranean area, and we are not taking advantage of that. Leptis Magna is one of the top*

> *archaeological sites in the world. Libya is a unique destination: the problem is not how to market it, but rather the fact that the government is not willing to spend money to market it.*
>
> (TourOp1)

Weaknesses:

Libya, like any destination, has disadvantages and shortages in some areas; Libya's destination managers must identify the destination weaknesses and establish plans to overcome and face these challenges.

1- There is an obvious shortage of the quantity and quality of hotels and resorts. Up to the present time, there is only one five-star hotel in Libya, which makes Libya unable to attract a million tourists as planned in 2008.

2- Libya's infrastructure is mostly poor, particularly in terms of tourist signs, public toilets and communication systems. This issue seems to be hard to solve due to the absence of collaboration and coordination between the General People's Committees.

3- Heritage and archaeological sites, moments, museums and ancient cities are not protected or maintained well. Even the five UNESCO World Heritage Sites are not controlled or well maintained according to UNESCO.

4- Neither the GPC nor the GBTTI have accurate information and statistics about tourism activities, the workforce, the unemployment rate, the number of international tourists or tourism businesses.

5- There is weak financial support for small and medium tourism enterprises: Tour Operators, hotels, transportation companies and restaurants suffer from the lack of financial resources. In addition, most of the investment banks in Libya encourage new investors rather than existing businesses.

6- The government has failed to protect the environment, not merely in tourism attractions, but even in the cities and there is rubbish and litter everywhere.

7- Libya has an image problem in most Western markets and the Libyan government has not done anything to enhance the county's image.

8- Chinese and Egyptian products have flooded the Libyan market. This is combined with low demand, and handicrafts and the traditional industries are in decline; the experts in these areas do not receive any sort of support.

9- Libya is associated with poor management, a lack of leadership and administrative instability which has ultimately led to a lack of vision and strategies.

10- According to the International Organisation Transparency, Libya has a high corruption rate which has had a sharp impact on tourism investment.

Opportunities:

1- Libya has a strategic location that links European countries with Africa, and the Middle East with eastern Arab countries. Therefore, Libya could be an attractive tourism destination for short-break holidays for European tourists as well as a good transit destination.

2- Libya has virgin land and has a good chance of developing high quality resorts and beach activities.

3- The increase of oil prices has made Libya a wealthy country; hence it is a convenient time for Libya to be developing its infrastructure, with a focus on hosting international conferences and the sponsorship of sporting events and races, such as the Paris-Dakar rally and the Africa Cup of Nations.

4- Libya's competitors in the MENA have chronic weaknesses, such as poverty, poor security and safety and inferior service quality, as well as environmental issues. According to Eragi (2007), tourism service quality in Egypt is still weak in terms of driving behaviour, transportation quality, security and safety and airport services. Eragi (2007) also stated that some tourists have indicated they would not like to visit Egypt again due to the traffic congestion, road accidents, the taxi drivers' behaviour and environmental issues such as pollution and noise. Thus, Libya can take the lead in these areas and benefit from its competitors' weak points.

Threats:

1- The absence of political reforms and the administration's instability may present an obstacle to tourism development in the long term.

2- Libya, like most Arab countries, is still under threat from al-Qaeda and extremists.

3- If Libya does not differentiate itself from its competitors and protect its heritage and culture, it will lose its identity.

8.11 The best practice model (SCDM2) for Libya's tourism development

Destination competitiveness is a vital issue and destinations should develop different approaches to gain a competitive advantage. Ritchie and Crouch (2003) argue that a conceptual model is a tool that provides a useful way of thinking in order to understand a complex issue. A number of products and destination competitiveness models are discussed in tourism literature and the most important and relevant models for destination competitiveness are those of Leiper (1979), Gronroos (1987), Poon (1993), Hassan (2000), Ritchie and Crouch (2003), Dwyer and Kim (2003), Jones and Haven-Tang (2005) as well as the European Federation Quality Model. The researcher considers that these models can establish a foundation from which to develop a Sustainable Competitive Destination Model (SCDM).

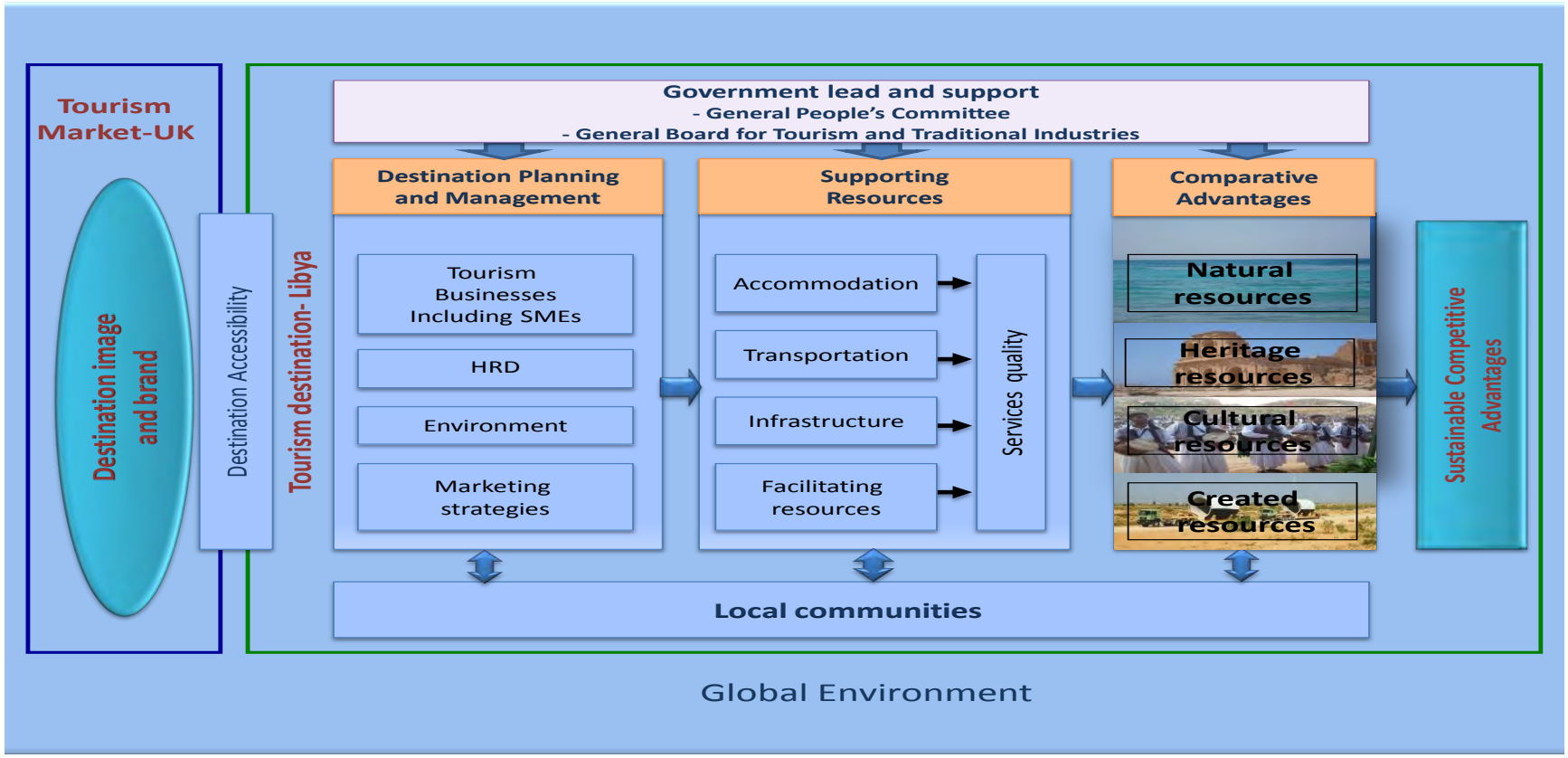
Following an in-depth discussion with Libya's tourism stakeholders about the components of the SCDM, the researcher realised the significance of amending the model. With the SCDM2, it is assumed that when tourists enter a destination they may

have some experience of supporting resources before visiting the attractions. However, destinations implement extensive marketing activities to attract foreign tourists, and therefore destination planning and management element should be closer to the tourists' market (see Figure 8.1).

In addition, through discussions with Libya's tourism stakeholders, the concept of service quality is often linked to supporting resources which include accommodation, transportation, infrastructure and facilitating resources. However, it is difficult to link marketing strategy, environmental issues and human resource development with service quality as it presented in the SCDM. Hence, it decided to link service quality with supporting resources including accommodation, transportation, infrastructure and facilitating resources as shown in Figure 8.1 below.

One additional point is that tourists come to visit and experience comparative advantage resources, (natural resources and those of heritage and culture as well as created resources); hence, they stay in accommodation, use transportation and make contact with the local community. Because of this, the comparative advantage constitutes the final stage of the SCDM2 process, and tourists have to experience those elements to reach their goal which is visiting the comparative advantage.

Figure 8.1 Best practice model (SCDM2) for developing Libya's tourism industry



8.12 Summary

Chapter eight discussed and analysed the findings and results of chapters six and seven, establishing a bridge between the results and the literature review. It also discussed the model elements in greater detail in relation to Libya's tourism industry; this consists of destination image in the UK, destination accessibility, the supporting resources, the comparative advantage, local communities, destination planning and management as well as service quality. The chapter also highlighted the significance of the global environment upon the Libyan tourism industry, without discuss this issue in detail.

An analysis was made of the Libyan tourism market using a SWOT analysis to identify the strengths and weakness of the Libyan tourism industry and to explore any opportunities and threats that could face Libya's tourism industry in the future. Finally, a best practice model (SCDM2) was considered, this being developed from the SCDM; the SCDM2 endeavours to avoid complexity and to be applicable to the environment in Libya. The SCDM2 and SWOT analysis therefore pave the way for Libya's destination decision-makers to develop Libya as an internationally competitive destination though a scientific approach.

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Chapter 9: Conclusions

9.1 Introduction

Chapter nine concludes the study on developing Libya as an internationally competitive tourism destination. Section 9.2 reviews how the research objectives have been achieved, section 9.3 presents a set of recommendations for Libyan decision-makers and section 9.4 highlights the major findings of the study in relation to developing Libya as a competitive tourism destination. In addition, section 9.5 outlines the significant contributions of the study to theory and practice, and finally, section 9.6 explains the study limitations and identifies opportunities for further research.

9.2 Review of objectives

The main purpose of the study is to explore Libya's ability to compete sustainably in the tourism market of the Middle East and North Africa. Therefore, the study investigates the challenges of Libya's tourism industry after the lifting of the UN international sanctions, particularly in relation to Libya's image with key markets. The study also makes significant recommendations for developing Libya as a sustainable competitive tourism destination. The study had six objectives.

9.2.1 Objective one

To undertake a critical review of relevant literature on tourism development with a special focus on the destination image and sustainable tourism competitiveness.

This objective was accomplished through undertaking a critical analysis of the relevant

literature and previous studies relating to destination sustainability and competitiveness. Chapter Three reviewed the impact of tourism and identified the concept of sustainable development, its importance, principles and objectives. It also addressed Triple Bottom Line Sustainability (TBLS) in relation to economic, socio-cultural and environmental agendas. The objective was also achieved through a broad discussion of the concept of destination competitiveness, including the destination competitive advantage and the destination generic competitive strategy. A number of destination competitive models were considered to provide the researcher with a wide scope of approaches, knowledge and sufficient background to develop a Sustainable Competitive Destination Model (SCDM).

9.2.2 Objective two

To develop a sustainable competitive destination model which can be applied to Libya as best practice for its destination competitiveness.

The researcher has developed an appropriate Sustainable Competitive Destination Model (SCDM), and then developed to (SCDM2) as best practice model for developing Libya as an internationally-competitive tourism destination; the model benefitted from the advantages of previous models and largely avoided any potential complexity. The developed framework (SCDM2) consisted of the most important issues and elements of destination competitiveness, such as destination image, destination accessibility, the comparative advantage, the supporting resources, local communities, destination planning and management. The model explains the contents of the tourism industry and how all these elements should be integrated in order to deliver a sustainable competitive

advantage. The framework also provides guidelines on how destinations, particularly new ones such as Libya, can compete effectively and efficiency in the international tourism market.

9.2.3 Objective three

To explore Libya's image in the UK as an international tourism destination (in comparison to its competitors in the MENA countries, namely Jordan, Egypt, Tunisia and Morocco).

Destination sustainability and competitiveness topic has become one of the most recognised issues in the tourism literature. Moreover, destinations often compete only via images in the potential tourists' perceptions (Pike and Ryan, 2004). The first phase of the SCDM2 focussed on the destination image in target markets. This objective was achieved in Chapter Six, where the Libyan image in the UK market was identified; it also made a comparison with the main MENA competitors (Jordan, Egypt, Tunisia and Morocco) these having similar geographic locations, climate, religion, language and the same tourism products.

The destination image can be influenced by many factors, such as the media, the internet, the tour operators' activities, branding and trust and connectivity communication. The impacts of all these factors were addressed in relation to Libya's image in the UK. This was captured using three research methods (focus group interviews, semi-structured interviews and document analysis) with the data being collected from three sources of information (potential British tourists' perceptions/non-

visitors, the opinions of British tourists who had already visited the country and the British media, focusing mainly on the BBC News from 2002 to 2009.

The international media play a crucial role in influencing the potential tourists' image; the British media have given extensive coverage to Qudaffi and his conflict with the West in general which has resulted in associating Libya with political issues, with accusations of terrorism support and bombings targeting the US and other Western countries. Overall, a sample of British focus group members (non-visitors) have no idea about Libyan tourism attractions, heritage and culture, due to a lack of information and little promotion of Libya in the UK (with their knowledge of Egypt being better than that of other countries in the region). None of the sample of non-tourists had ever seen an advertisement, brochure or programme about Libya and the only information they had was that Qudaffi controls the country and has anti-western policies. The British non-visitors perceived Libya as a place of oil with a hot climate, desert and a similar culture to Arab countries. Libya has a low position in the potential British visitor's mind, while Egypt and Morocco are the favourite MENA destinations.

However, most of the selected sample of British tourists had been to other Arab and Islamic countries, but they could not find any similarities between Libya and those countries other than the language and religion; they described Libyans as being very friendly, hospitable and helpful and asserted that Libya was a safe destination. The top five tour operators in the UK are Thomson, Air Tours, First Choice, Thomas Cook and Carlson, these owning more than 75% of the UK market share (Klemm and Parkinson, 2001), but not offering package tours to Libya. However, the study revealed that the

main British tour operators still have a fear of entering the Libyan market because of its association with high risk.

9.2.4 Objective four

To analyse Libya's tourism industry elements including: the accessibility of the destination, its comparative advantage, supporting resources, local communities, and destination planning and management.

The researcher applied the sustainable competitive destination model (SCDM) as the best practice approach to evaluate and develop Libya's tourism industry. The SCDM is a framework which addresses the main factors of the Libyan tourism industry, namely destination accessibility, the supporting resources, the comparative advantage, local communities, destination planning and management, as well as the global environment impact on tourism development. Chapter seven was therefore designed to analyse these elements while chapter eight discussed the elements of Libyan tourism, so linking them to the literature review. To achieve this objective, five data and information sources were employed to analyse Libya's tourism industry, these being: 1- governors, 2- tour operators, 3- hotel managers, 4- tourists and 5- local residents (all also known as tourism stakeholders). These were combined by adopting four main qualitative data collection methods: semi-structured interviews, audiovisual materials, participant observation and document analysis.

9.2.4.1 Destination accessibility

Libya is not as easily accessible as its competitors and the implementation of the new

procedures which require all foreign tourists to have an Arabic translation page in their passports has had a direct impact on the number of international arrivals, particularly as regards cruise tours. It can also be noted that the procedures for obtaining a visa in addition to the immigration services are inadequate and need to be improved, besides developing human resources and a proper management style at the entry points. British tourists use British Airways to visit Libya because Libyan airlines are not reliable, and no charter flights go to Libya at present.

9.2.4.2 Libya's comparative advantage

Libya possesses an attractive and pleasant climate as well as a variety of unique and natural resources, such as a relatively clean sea, sandy beaches, huge desert, green mountains and stunning oases and lakes. Up to the present time (2009), no thought has been given to the possibility of using the 1700 km of sandy beaches for tourism. Hence, the beaches are neglected and used by the locals without any organisation or control. Libya also has the extremely well preserved Greek and Roman historical sites of Cyrene, Aploiona, Tolimita, Sabratha, Leptis Magna, and stunning ancient cities such as Gadamas Ghat, Gurza, Nalut and Gaser Alhaj; yet neither the antiquities' authority nor the tourism police department are capable of protecting and maintaining these valuable historical treasures.

9.2.4.3 Libya's tourism supporting resources

There is an obvious shortage in the quantity and quality of hotels: In Libya, tourists use one type of accommodation, namely hotels. However, hotels in Libya vary, as some of them are state-owned/run while private hotels are owned by individuals, local

companies or are joint ventures with foreign investors. The number of hotels is inadequate and the standards are very often not up to those of international hotels, hence private hotels are far superior to state hotels.

There is an agreement among Libyan tourism stakeholders that Libya's transportation and infrastructure is poor despite recent developments. A significant number of Libyans question whether the government can establish a competitive infrastructure due to the absence of good planning, corruption and the instability of government structures (the type and number of GPCs). In this regard, the roads are satisfactory where there are signs, but public toilets, landline communications, internet services, tourism police management, tourist information, healthcare, entertainment facilities and shopping centres urgently need an upgrade.

9.2.4.4 Local communities

Libyans are seen in the UK and the West in general in the light of political issues. However, the people are friendly, generous and helpful, and consider tourists as guests, unlike their neighbouring competitors, who perceive tourists as a source of money. Libyans are not naturally aggressive as perceived by non-visitors. Due to the nature of the tourism industry and its cultural impact, it is necessary for the government, tour operators, hotels and tourists to respect local culture and traditions. The government should seriously consider important issues such as whether or not to allow alcohol, dress codes (particularly for swimwear) and the requirements for the holy month of Ramadan.

Despite the Libyan political system which allow Libyans to participate in local congresses to make appropriate decisions, practically a low number of people attend local congress sessions and many strategic decision made by the GPC and GBTTI. Moreover, locals are unaware of the importance of tourism attractions.

9.2.4.5 Destination planning and management

The Green Book established the framework of Libya's political system, but did not determine the formal shape of the GPC. It can be seen that the government structure changes every few years, but there is no fixed period for each election round. This has led to confused planning and priorities in addition to the loss of documents, information and statistics. For instance, the GPC issued Resolution number 142 on 17th September 2005 for the establishment of the General Corporation of Infrastructure and Constructive Development (GICD); they decided to set up the GBTTI, which was then established in 26th February 2007, instead of the General People's Committee of Tourism (Tourism ministry). Consequently, in 2008, the GPC for manpower and training was cancelled. Under these circumstances it became impossible to predict who would be responsible for tourism or any particular sector, which undermined the reliability of the government for foreign investors and international organisations.

Tourism is an integrated activity between the public and the private sector; it also involves other interested bodies in tourism, including tourism businesses (tour operators, travel agencies, hotel proprietors, transportation companies and entertainment facilitators) in addition to the tourists and local communities. These tourism stakeholders should therefore benefit from the tourism activity (see chapter four for

more details) to insure that all the stakeholders participate and contribute in the destination development, or at least ensure that none of the tourism stakeholders has a negative attitude towards the tourism industry. The study also revealed that tour operators and hotel managers, who represent the backbone of the tourism industry, are not involved in tourism plans or destination development and, moreover, have never heard about the Libyan NTDP. The vast majority of tour operators and hotel managers are not surprisingly unhappy about the lack of achievement of the GPC and GBTTI and have a poor relationship with them. Inviting tourism stakeholders for discussions would therefore minimise misunderstandings and provide the decision makers with the chance to be aware of the obstacles and difficulties facing the industry, enabling them to predict any potential risks.

Libya is one of the safest tourism destinations, not only in the MENA region, but worldwide. In Libya, all tourists, and particularly organised groups, are escorted by tourism policemen and the tourists' safety and security are paramount. Information about Libya's tourism attractions is anyway very limited, alongside the absence of any destination promotions and therefore tourist groups have no alternative but to use tour and guides and leaders.

The study indicated that Libya's education output system is weak, and institutions focus on theories and books instead of providing graduates with practical courses. There is additionally a lack of training programmes, with internal courses being considered invalid. This has combined with cultural influences and organisation loyalty, as well as a weak auditing and monitoring system, and has resulted in Libyan society witnessing

the new phenomenon whereby Libyans have low loyalty to their organisations and the people in charge and responsible for keeping and protecting national treasures. An example of this was experienced by the researcher at the Leptis Magna site where a cashier handed him a used receipt for entry to the site for the use of a camera. Even the investors are aware that the country is associated with high corruption rates, with a percentage of the project contracts going to the mediators and decision makers, particularly the technical supervisors and financial managers.

There has been a significant growth in destination marketing (Hankinson, 2003) but the concept of destination branding has not yet been studied in depth (Cai, 2002). Some destinations have developed powerful brands, such as New Zealand (Morgan *et al.,* 2004), Singapore and Thailand (Davies, 2003) while other countries have decided to rebrand their destinations, such as Turkey (Tasci *et al*., (2007) and France (Olins, 2004). Libya entered the tourism market without considering the destination brand for attracting foreign tourists and differentiating its tourism product from its competitors; however the Libyan National Tourism Development plan (published in 1997) did emphasise the importance of developing a destination brand. The GBTTI used some terms for marketing purposes, such as 'blue and yellow make green', 'Libya is near' and 'Silent Treasures'. These terms, however, do not amount to a destination brand, but show the confusion in understanding marketing science and destination branding. Significantly, Jordan has developed an appealing destination brand, but it is designed with Arabic words which are unintelligible to most foreigners. Therefore, if Libya is targeting foreign tourists, the brand should be understood by them as well.

Qudaffi came to power in 1969 with a socialist ideology and was very much influenced by Jamal Abd-Nassar, the Egyptian president who died in 1970. Qudaffi's ideas were presented in the Green Book, which established the foundation of Libya's social economic and political system. The government was responsible for running the economy and industry, and individuals were not permitted to monopolise any economic activity: workers were partners and not slaves and they had the right to manage and divide the profits. Unfortunately, these ideas did not work on the ground for many reasons most of which were culture related. In the late 1990s, Libya witnessed dramatic changes both politically and economically, Qudaffi called for a privatised state sector and encouraged individuals to establish shared companies; the country was also opened up for foreign investment. This reflects Libya's economic system which led to a weak private sector with individuals and local companies having limited financial resources. Libyan tour operators also believed that large international tour operators needed large local tour operators to deal with them.

This study has revealed just how unhappy everyone is with the environmental situation: all the stakeholders complained that the government ignores the environment. There is a designated authority for the environment and some private companies for cleaning and disposing of rubbish. The problem is that Libya is not adopting a developed approach for the disposal of refuse, nor protecting the environment. Locals and SMEs throw rubbish in the entrance and exits of the cities and even the tourist attractions are in a miserable situation, with cans, plastic bottles and bags. The city of Tripoli was called the Pride of the Sea, but the name is no longer used due to the absence of cleanliness. In this regard, tour guides, who were part of the resident participants in this study,

described plastic bottles and discarded bags as being the first enemy of Libya's tourism industry.

9.2.5 Objective five

To determine the challenges of Libya's tourism industry after the lifting of the UN sanctions in 2003 and to identify Libya's key tourism assets using SWOT analysis thereby differentiating Libya as a competitive international tourism destination.

The Libyan tourism industry emerged after the UN sanctions in 2003 (a period of more than a decade when no inbound and outbound flights were operating). After a signed agreement between Libya, the US and the UK, UN sanctions were suspended in 1999 and lifted later in 2003. Libya's tourism industry then began to develop, after a difficult period, and found itself facing sharp competition in the MENA tourism market, and unlimited challenges and obstacles emerged in the process. However, most of the people involved in the industry were aware of these challenges, including the managers in the General Board for Tourism and Traditional Industries, the tour operators, hotel managers, tourists and local communities. Nevertheless, the stakeholders have been unable to surmount these problems for a variety of reasons, mostly the absence of planning, collaboration, coordination and government support. The study conducted a comprehensive investigation with sample of Libyan tourism stakeholders (as set out in Chapter Seven) to identify and analyse the challenges and obstacles facing the Libyan tourism industry and to establish how to meet these challenges and gain entry to the MENA tourism market.

The second part of this objective was fulfilled by carrying out a SWOT analysis (strengths, weaknesses, opportunities and threats). This analysis identified the strengths and weaknesses of the industry, providing a clear image of the destination management and marketers about the potential opportunities and the type of threats that this particular destination could experience.

In Chapter Eight, the opinions of the Libyan tourism stakeholders were considered alongside photographs and documentary analysis to increase the reliability of the analysis. Moreover, the analysis not only presented the reality of the Libyan tourism industry, but also revealed some possible solutions for many of the dilemmas of the Libyan tourism industry. Some valuable recommendations for developing the tourism industry were also made which differentiated Libya as a new international tourism destination.

9.2.6 Objective six

To make recommendations for developing Libya as a sustainable competitive tourism destination.

This objective concerns the research question of how Libya can become a significant, sustainable and competitive tourist destination. In order to achieve this objective and answer the research question, the Libyan decision makers, including the General Board for Tourism and Traditional Industries, tour operators, hotel managers and local communities should integrate their efforts and work according to an action plan with specific objectives. In this way, both private enterprises and the state (government)

would be able to contribute to the industry effectively. A set of practical recommendations was therefore developed after the problems had been determined and analysed. Due to the different duties and responsibilities of the stakeholder members, the study made specific recommendations for the main decision makers to develop Libya's tourism industry, as explained in the following section.

Recommendations for the Libyan General People's Congress

Achieving targets cannot be done without focus and stability. Although the Green Book determines the process of electing the General People's Congress members as well as the Cabinet and General People's Committee Secretaries, on a practical level, every three or four years there are new secretaries and a new government structure; this is associated with a move from centralisation to decentralisation. The country's development could not be achieved under an unstable political government structure; administrative instability would mean the lack of thought, planning, monitoring projects as well as a waste of time, effort and resources. The effectiveness of any organisation or sector depends upon the head of the organisation in this regard and the process of selecting the Secretaries of the General People's Committee is not obvious. Previously, most of the secretaries were in power for long periods of time and moved from one sector to another without any auditing. This was also a time when no particular criteria were set for these posts. Therefore, the government structure needs to be defined and leading positions should be filled by suitable people who meet particular criteria.

Recommendations for the Libyan General People's Committee

- The GPC needs to consider the tourism industry when devising strategic plans and taking decisions; it also needs to take a leading role in the process of developing the country.
- There should be adequate budgets for the tourism sector particularly for enhancing Libya's image abroad and for external marketing activities.
- The authority for antiquities should be transferred from the General Peoples Committee to the GBTTI: logically two authorities cannot lead one sector.
- There needs to be complete coordination among the GPCs for establishing facilities as part of the tourism industry, such as developing airports, public toilets and arranging international events.
- The tourism sector should be supported by the issuing of laws, regulations and facilities to develop the tourism industry.
- The environment is a major concern in the development of the country and the GPC must place this at the top of its agenda.

Recommendations for the Libyan General Board for Tourism and Traditional Industries (GBTTI)

- Appropriate plans and specific objectives for developing Libya's tourism industry should be established for long and short-term plans and all the tourism stakeholders must be involved in the planning and decision-making process.
- Objectives and policies should be established based on scientific research, and reliable data, statistics and information; it is also recommended that a data base centre should be set up in the GBTTI.

- There should be a concentration on quality in Libya's tourism product and to this end the GBTTI must establish a quality control department.
- The Small and Medium Sized Enterprises (SMEs) should be supported and encouraged by enabling them to surmount the obstacles and problems facing them.
- Appropriate marketing strategies and policies for different markets and tourists need to be established.
- Creating Libya's destination brand is essential to protect the tourism product and to differentiate Libya from its competitors.
- There needs to be a focus on training and developing human resources as a key for success, to improve the employees' performance and customer satisfaction.
- The GBTTI needs an urgent action plan to protect Libya's antiquities, heritage, historical sites, paintings, manuscripts and museums, with a stakeholders' co-operation.
- The GBTTI needs to implement an effective controlling monitoring plan for tourism businesses in order to guarantee their performance and provide services of a high standard.
- The GBTTI should taking care of historical sites and carrying out regular maintenance as well as conducting exploration and excavation studies.
- The GBTTI should activating tourism programmes to promote the destinations, particularly in main tourists markets, and improving local awareness regarding the importance of tourism and antiquities.
- The GBTTI has responsibility for developing and encouraging Libyan traditional food producers in order to increase the quality and diversity of the

food.

- The GBTTI should improving the performance of tourism police officers and establishing an appropriate systematic approach to protect tourists and take legal action against offences.
- A critical decisions should not be taken without taking in account the stakeholder opinions and attitudes such as the topic of alcohol and beaches.
- Actions or a decision should be carefully considered since tourism is a complex and sensitive industry; additionally, the arranging of international events should be given to the private sector or foreign investors.

9.3 Research contributions

The research makes the following contributions:

9.3.1 Contribution to Theory

Little research has been conducted in human resources, training, and investment in the Libyan hospitality sector. Moreover, an analysis of the Libyan tourism industry to date has not yet been carried out. Hence, this study may be regarded as a pioneer study in the Libyan tourism context, addressing all the tourism industry elements and so contributing to the body of knowledge about Libya's tourism. The study reviews and critically discusses the subject of destination sustainability and competitiveness, analysing the developed models in this area in order to understand the dynamic process of the destination elements. In addition, the researcher took advantage of previous models to develop an appropriate model that could gain a competitive advantage. After a second reading and an analysis of the previous models and theories, the researcher then developed a Sustainable Competitive Destination Model (SCDM). The SCDM

consists of the main destination elements relating to the tourism industry with the model being divided into two phases. Phase one considers the destination image abroad, in particular as regards the tourist target markets, the destination image formulated by sources such the media (TV, advertisements, the Iinternet, etc), tour operators, 'word-of-mouth' communication and the destination brand. Phase two focuses on the tourism destination, considering all the activities related to the tourism industry which influence the tourists' experience, including destination planning and management (as represented in the government, tourism businesses, human resources development, environment and marketing strategies) in addition to supporting resources (including accommodation, transportation, infrastructure and facilitating resources). Supporting resources are the facilities and services provided to the tourists in their visit to enable them to experience the comparative advantages, while the tourism product consists of the comparative advantages of natural resources, heritage, culture, and created resources.

The model also highlighted the significance of the role of local communities and the influence of the global environment: political, economic, social and cultural, technological, competitive and environmental. This model applies more to national destinations than regional destinations, but the nature and characteristics of the destinations should be taken into account when applying any model. The study further contributes to the growing research in the tourism field in general.

9.3.2 Contribution to practice

The SCDM has been developed from the literature review and then applied to the case study (of Libya as a tourism destination); through the analysis and discussion of the

model elements, the researcher realised that the model required some amendments to avoid complexity and maximise the value and advantages of the model. Consequently, a new and amended model was devised SCDM2 which was considered as a best practice framework. It can be said that the SCDM2 is an appropriate tool to analyse and evaluate the Libyan tourism industry. The framework facilitates the process of understanding the entire industry and indicates the strengths and weaknesses of the Libyan tourism industry. For example, the model analysis shows that Libya faces tremendous challenges not merely with the supporting resources and destination management, but also with difficult obstacles in foreign markets as well as destination accessibility. In addition, the study sheds light on particular critical issues in the Libyan tourism industry itself, these not having been adequately addressed before. These concern such matters as the significance of intercultural communications and focus on quality through targeting specific market segments. The researcher endeavoured to make the model comprehensive to ensure that all the tourism elements were included and aimed to make the model simple and practical.

The study explored the reality of Libya's image in the UK market to see how British people perceive Libya. This can then focus the attention of the destination managers and marketers on the importance of enhancing the destination image aboard, particularly in the UK. Here, the study also highlighted which image attributes Libya should focus upon to develop its image. British people identified 23 destination image attributes (as discussed in Chapter 6) and safety and security were major concerns in choosing where to go on holiday. In addition, it became apparent that there was a big demand for information availability and reliability.

The SCDM and SCDM2 revealed that the core tourism products were the comparative advantages, natural resources, heritage, culture and created resources. The study therefore makes recommendations to develop a destination brand which reflects these four factors. As regards the destination, there are no unique comparative advantages, but it is possible to concentrate upon the supporting resources such as accommodation, transport, the infrastructure and the facilitating resources, including destination safety and security. The brand should be unique and it should be possible to distinguish the destination from its competitors; the promise of the brand needs to be honest and real as well as being attractive, easy to understand and memorable. The study's ideas and recommendations would also be more valuable if considered by the team involved in developing the Libyan NTDP.

The study calls for an urgent action plan to protect Libya's historical sites and monuments and recommends connecting the antiquities' authorities to the GBTTI where it can integrate its efforts with the tourism police authority. This will ensure that tourism attractions, including antiquities, monuments, paintings and manuscripts are secure and protected. Additionally, the study suggests recommendations to develop Libya as a competitive tourism destination. In order to minimise and avoid mistakes, full collaboration and co-operation among the tourism stakeholders is essential; this includes the government, tourism and hospitality educational institutes, tour operators, hotels, resorts, tourist and local communities. Such co-operation is particularly crucial in the preparatory stages of the LNDP.

This study makes a further practical contribution through analysing Libya's tourism industry by using a SWOT analysis. By analysing the strengths and weaknesses of Libya's tourism industry, it is hoped that this will help decision makers consider the most critical issues. The analysis can also predict the potential opportunities of new markets and tourists and consider the threats that might face the industry in the future.

9.4 Research Limitations

This study has taken four years to complete: the researcher was very active and enthusiastic in the first stage of the research journey and was keen to examine the subject in depth by testing the qualitative results with quantitative approach. He personally interviewed a sample of the Libyan tourism stakeholders, including the tourists, governors, tour operators, hotel managers and local residents through a qualitative perspective. In addition, excursions were made to the tourism sites to make notes and take photographs, so enabling even minor issues to be considered, but due to a wide scope of the research including the area and population in this study not all members in the population have an equal chance to be selected in the research samples.

However, acquiring information is no easy task, particularly when the gathering of information is seen as a threat by most of the Libyan managers in state organisations. They seem to be of the opinion that academic research and the scrutiny of the media is intended to criticise their performance and may endanger their positions. As a result of this, some of the General People's Committees and authorities refused to participate in this study, citing bureaucracy and security for their reluctance even though their contribution would have been valuable. This was the case for example at Tripoli

International Airport in the Nationality and Immigration Department, as well as with personnel from the environment and infrastructure authorities.

As discussed in Chapter Eight, the information and statistics were limited and unreliable, particularly about the tourism industry. This type of limitations has therefore made it impossible for the researcher to review the current situation and compare it with Libya's competitors. An example of this is the total number of international arrivals in 2004 compared with the total number of international arrivals in 2007 (in Appendix C) as there was a considerable discrepancy of between 999,343 and 105,997 arrivals. Additionally, the GBTTI was unable to account for tourism revenues and jobs.

Collecting data is no easy task, and while the researcher targeted non-visitors in the UK to identify Libya's image compared with competitors in the MENA region, he also intended to conduct semi-structured interviews with British non-visitors in the departure lounges of UK airports. However, due to increased security procedures at UK airports, particularly after the London underground attacks in July 2005, a director at Cardiff airport informed the researcher of the necessity to provide a formal letter concerning the research purpose, with a more detailed explanation concerning the target interviewees, the time, dates and reasons for selecting these particular interviewees. He also he added that the researcher would be escorted by police security during the interviews. This difficult situation would place both the researcher and the interviewees under pressure and they would not free to discuss particular issues relating to Libya's image in the UK. Therefore, the researcher was forced to use focus group interviews with non-visitors at UK Tourism universities, for two reasons: firstly, to gain rich information from group

discussions, and secondly, the researcher had the advantage of finding the participants and was able to use the university facilities to conduct focus group meetings. It can therefore be said that data access is an area fraught with difficulties, which researchers must consider in the early stages of research design.

Libya is a conservative community influenced by Arabic culture and Islamic principles and since women are part of Libyan social life, they engage in most industries and even work in the army. However, the relationship between men and women in public places is still seen as an impolite action; this applies to any woman excluding wives, sisters, friends or relatives. Such behaviour may cause critical problems for the researcher. For this reason, the researcher could not interview female members as part of local communities to understand the opinions and attitudes of Libyan females towards tourism development. However, if the researcher had been female, it would have been easy for her to ask men to participate and contribute to her study.

Another limitation of this study is the relatively small number of British tourists interviewed. The selected sample consisted of six British tourists, who came to visit the Roman and Greek antiquities, and it was difficult to conduct an interview with them not only because of the tourism police escorts, but because of their tight schedules. Hence, the study did not address other tourism purposes such as those of adventure opportunities and business. As with any social science research, it was expected that the researcher would experience some challenges. In this particular case, these included technical risks, financial support limitations and health problems.

9.5 Opportunities for future research

Destination competitiveness is a crucial subject; destinations nowadays require effective and new ways in which to gain a competitive advantage through the exploitation of their tourism resources. The study therefore invites researchers to identify Libya's image in other significant markets. This image in the UK can also be measured by conducting a quantitative approach with a survey or a questionnaire; in this way, the findings and results may be generalised. Additionally, it is possible for researchers to develop a framework with which to measure destination image. Here the researcher was engaged in developing a model with which to measure the destination image statistically and which could be published as an academic paper.

The destination marketing environment is an interesting field of study and a broad subject. This study highlighted the significance of the global environment on the tourism industry. However, investigating the impact of the global environment is crucial for tourism destinations and this would be a rich area for future research, especially with the increase in globalisation.

A further point is that little attention has been paid to local communities; numerous studies have revealed that the majority of tourists go to a particular destination for its physical features, irrespective of the people living there. Krippendorf (1999) therefore questions why researchers have paid so little attention to the local people. Despite the significant role of local communities in tourism development, the study also revealed how local communities in Libya do not play any role in tourism plans and the political system gives the local people the right to decision making only through their

participants in the local congress. This issue cannot be clarified however without carrying out a specific research and focusing upon the impact of the tourism industry on local communities.

9.6 Personal reflections

This research is the fruit of four years of extensive research, focusing on identifying Libya's image in the UK market and analysing the Libyan tourism industry in order to develop Libya as an international tourism destination. The researcher's qualifications were in business administration; this includes a first degree, a pre-MBA and a Master's degree (as mentioned in Chapter One). He also has significant experience with government polices, planning and decision-making processes as well as in the area of cultural influences. This situation provided the researcher with a tremendous opportunity to investigate insights into Libya's tourism issues. The experience also enabled the researcher to glean information from the perspective of different stakeholders. Additionally, the researcher benefited from his background in developing the SCDM.

This study has expanded the researcher's knowledge in the tourism field in general, so allowing the researcher to understand the academic research process as well as to recognise the differences in research methodologies, methods and sampling techniques. Further to this, the ethical issues of the research provided the researcher with the basic skills to conduct similar research as well as to make it possible to explore the challenges facing the Libyan tourism industry, to determine how the destination could be developed through the SCDM and how Libya could differentiate itself from its

competitors. Though contact with different cultures and backgrounds in the UK, the four years of research not only advanced the researcher's knowledge, but also changed his thinking.

Additionally, gaining a PhD will undoubtedly open new doors for the researcher to take leading positions in Libya's government, one of these positions being that of a secretary for the local planning council in the West Mountain province; this means the researcher has the chance to discuss the development of the tourism industry in the light of his findings and results and can therefore make appropriate decisions.

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