The University of Nottingham

Bahrain's competitiveness as an international tourism destination among the Gulf Cooperation Council countries

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MSc Tourism Management and Marketing

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by

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2009

A Dissertation presented in part consideration for the degree of

MSc Tourism Management and Marketing

ABSTRACT

This study is an attempt to analyse the tourism potentials of the Middle Eastern state of Bahrain which is among those destinations that contribute to the rising popularity of tourism in the region which sets the need for competitive sustainability among them. The Kingdom's competitiveness is analysed among fellow Gulf Cooperation Council states of Kuwait, Qatar, Oman, Saudi Arabia and the UAE. Thus the theoretical framework followed in the study and analysis is a model of competitiveness and sustainability. On analysing academic literature in light of the study, Bahrain's tourism industry is analysed based on the secondary source of data collected in the research process. This data is then inculcated into the competitive backdrop of Bahrain as a tourism destination in comparison to the other GCC states. The review and analysis of data is then followed by discussion of findings for which recommendations have also been given so that Bahrain further develops into and sustains a competitive position in the GCC tourism market.

To God....

For the gifts of..

Wisdom

Forbearance

And wonderful people around to help and support me complete this project

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CHAPTER 1 BACKGROUND OVERVIEW

1.1 Introduction

The tourism industry is considered to be one of the largest industries in the world. This industry is also among the worst hit service industries by the global financial downturn due to its direct and indirect connections to the finance industry and hence nations' economies. Organisations' performances in the industry have changed leaps and bounds particularly towards the end of 2008 continuing to the start of 2009, also affecting travel patterns by tourists internationally. Though the industry is not of a complex structure, due to its inter-relative and inter-dependant nature economies where tourism has been a major revenue contributor have witnessed great changes in visitor numbers. They enter into a fiercer competitive arena as they try to retain their tourism image and values by introducing attractive deals through their product and price attributes.

The United Nations World Tourism Organisation (UNWTO)'s World Tourism Barometer as of January 2009 has studied tourism trends in the year of 2008 and has unfavourable forecast condition for changes in tourism performance in 2009. The tourism industry witnessed the fourth consecutive year of growth in international tourism in 2007 (WTO Barometer 2009:1), until the macro environmental conditions caused furore creating a decline in the second half of 2008 and continuing into 2009. The WTO expects further decline of international tourism by 2-3% in 2009 and currently affirms Europe to

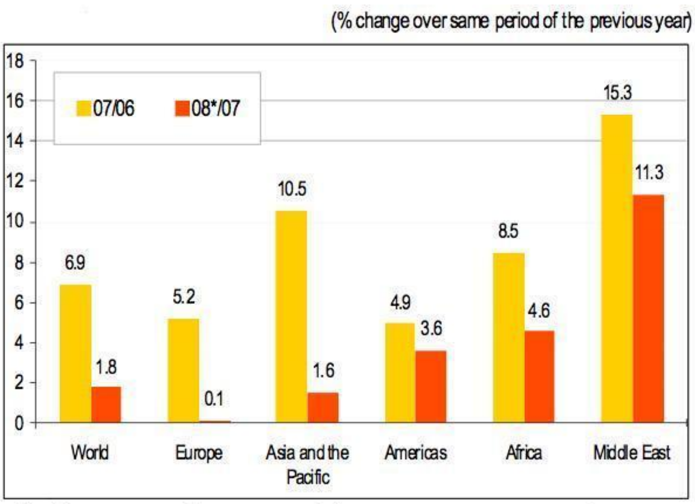

Fig. 1.1 International Tourist Arrivals (Source: WTO Barometer, 2009)

have been hit the worst with a decline of -3% while the Americas, Africa and the Middle East have posted the best performances with +4%, +5% and +11% growth respectively (Fig.1). However, the report states that the economic fluctuations and the recovery of the crisis would impact the tourist patterns over the forthcoming periods. In addition to the impact of the recession on tourism demand, the H1N1 flu virus has been another threat to international travel having created a health safety scare alert.

However as Wahab and Pigram (1997:17) say, the tourism industry is one which should equip itself to expect and accept changes in the global and societal scenarios which may be positive or negative forces. They continue to state that the tourism industry should manage to adhere to those changes and accommodate to it thus creating for itself advantages and opportunities to survive the transformation. This further points towards the ability of a tourism destination to offer its products and services in a competitive manner as well as in a sustainable manner to project long-term development. Nevertheless a destination attempting to foray competitively should seek the participation and cooperation of stakeholders within the destination together establishing a unique haven of experiences awaiting a visitor. While tourists are in search of experiences that are unique, they seek destinations that differ culturally, socially and environmentally; leaving destinations with opportunities and the need to diversify their potentials and offerings by creating value-oriented products and services in partnership with firms operating within the destination.

'*Competition among tourism destinations is but one manifestation of the broader phenomenon of the new economic competition (Asch and Wolfe, 2001)*'(as cited in Ritchie and Crouch, 2003). Ritchie and Crouch (2003) state that a destination's competitiveness is a country's ability to create added value which increases its national wealth in such a way that it takes into account the destination's natural capital and the preservation of future generations. This may also create fierce competition between traditional destinations seeking to maintain and expand their market share and so the success of tourist destinations thus depends on their regional tourist competitiveness in terms of the attractiveness characteristics that make up the tourist strength of that area.

The World Economic Forum (WEF) report 2009, addressing travel and tourism competitiveness in the Arab world states that international tourism arrivals totalled 25.3 million in 1950 which rose to 806.8 million by 2005, which implies a 32 fold growth. The report suggests that this increase is due to the advantage of the strategic location between Asia and Europe. Moreover, on observing trends over the years, it can be said that increased air transport and sea transport routes as well as innovations to attract all segments of tourists has proved beneficial (Euromonitor, 2008).

The Travel and Tourism Competitiveness Index (TTCI) (WEF, 2009) saw the rankings of the Gulf Cooperation Council (GCC) countries out of 40 Middle Eastern and African countries as follows:

Countries	**Regional Rank/40**	**World Overall Rank/133**
Bahrain	5	41
Kuwait	17	95
Qatar	3	37
Oman	10	68
Saudi Arabia	11	61
UAE	1	33

Table 1.1 : TTCI Rankings of the GCC countries (Source: WEF Report, 2009)

The TTCI was based on travel and tourism sub-indexes; a regulatory framework, business environment and infrastructure and human, cultural and natural resources. Due to the nature of study and availability of data and time in hand, a single GCC state will be further studied; Bahrain.

Bahrain, officially the Kingdom of Bahrain is a borderless island country in the Persian Gulf and is the smallest Arab nation. Bahrain together with Kuwait, Qatar, Oman, Saudi Arabia and the United Arab Emirates (UAE) forms the Gulf Cooperation Council (GCC), a council created with regard to the economic and social activities in the selected regions.

It can be observed that Bahrain as a tourist destination ranks among the top 3 of the GCC countries following the UAE and Qatar. How can Bahrain stay competent and stay ahead of competition from Oman, Kuwait and Saudi Arabia? And, what can Bahrain do in order to surge forward and rise so as to place itself at par with Qatar's and the UAE's competitive advantages? (The questions rise in support of the facts such as Qatar's high quality human resources and excellent air transport infrastructure and the UAE'S governmental priority for the tourism industry and positive attitude towards foreign travellers-WEF 2007 and 2009).
The development of Bahrain as a favoured business state hence favouring the MICE sector as well (BEDB, 2008) indicates that the tourism officials definitely aim at developing Bahrain's tourism potential. Also the state has been benefitting in the region as the birth place of the Formula 1 race, nevertheless presenting Bahrain tourism with a Unique Selling Proposition (USP) is the key challenge and will prove to be an edge over in competitiveness. Through secondary data research, this project aims to analyse Bahrain's current position as a competent destination among the other GCC states while studying and considering the various factors that affect its credibility and tourism development/growth.

1.2 Statement of Problems

Bahrain has undoubtedly been benefitting from tourism internationally and from regional and neighbouring Arab states particularly since the completion and opening of the Bahrain Saudi Causeway and the introduction of the first Formula 1 racing circuit in the Middle East, in Bahrain in 2005. It was in 2002 that tourism was recognised as a top governmental priority (Mansfeld and Winckler, 2008). However there rises a need for the players in the industry to formulate a wholly deliverable tourism strategy that would see the collaboration and partnership of public and private sector parties, the emphasis on participation of the local people and residents and an environment friendly approach towards nurturing tourism in the country. Currently the tourism and travel industry contributes 12% to the national GDP a figure which the Bahraini government and private sector seek to raise to 25% in the next ten years (bahraingateway.com, 2009).

The government ought to realise the need of tourism as a strong alternative to its oil rich status however the move towards achieving a tourism vision is poor, also considering the fact that the other Gulf States also have similar product offerings rather comparative advantages hence posing as a challenge for Bahrain tourism to stand out of this commonality status. Perhaps the side-lining for the tourism industry is the fact that Bahrain as a finance capital and business friendly economy is well known and well accepted by investors. Nevertheless, the Kingdom's Economic Vision 2030 together with an aim to 'championing' sustainability, competitiveness and fairness seeks to build on the tourism sector as one among the non-oil revenue earners (p.15).

The Bahrain Economic Development Board (BEDB) is a key initiator towards tourism development in the Kingdom. The BEDB took a step forward in designing a process in defining a tourism vision and roadmap in 2005 having led to a decision in establishing a Tourism Development Board which would strategise and master a tourism plan (bahrainona.com, 2009). Bahrain's tourism industry is indeed a flourishing one however a planned framework is missing in the Kingdom. The MICE sector is a greatly flourishing one, so is the USP of the Formula 1 races in Bahrain's current tourism scenario. The absence of a combined structured body to regulate and maintain a sustainable approach that links the productivity of these two sections and other contributors in the service industry is of concern.

Further as mentioned by Sheikha Mai bint Mohammed Al Khalifa, Minister of Culture and Information, there is a strong need and urge for the public and private sector organisations of the tourism and hospitality industry to work together towards achieving a common goal (bahraingateway.com, 2009). Additionally as the tourism sector in the country moves towards a revamp the Tourism Sector Advisor, Dr. Heba A Aziz, applauds the efforts of the private sector in promoting tourism without the backing of the public sector (mybahrain.net, 2009). This further stresses the removal of blockades between stakeholders in the community to gain and sustain successful results from the industry.

These concerns directly affect tourism management in the Kingdom having to seek ways towards efficiently managing human resources, planning a marketing and financial management strategy and maintaining an overall sustainable tourism approach to overcome future barriers in the country's flourishing tourism scenario. Management of these attributes would guide the country to achieve a competitive status.

1.3 Objectives

The dissertation aims:

- To consider the tourism planning methodologies in place implemented to develop tourism in the GCC states with detailed analysis in the light of Bahrain tourism.

Although in Bahrain, it is only now that an independent tourism authority is being considered, how has tourism been planned through the years such that it could forecast Bahrain in a competitive position?

- To study the development of Bahrain tourism and compare it with that of the other GCC states' tourism development.

Its growth over the years in comparison to other states development, will provide an insight into its potential competitive advantages as well as an indication to where it could rank in future in terms of competitiveness in the context of growing popularity in Middle East tourism.

- To identify approaches to destination management in the GCC states that gives them the competitive advantage over Bahrain and also to identify the strengths and weaknesses of Bahrain tourism management over the GCC states.

It is commendable that on analysing trends and opportunities, a plan could be mapped out to place Bahrain competitively among the GCC countries.

1.4 Theoretical Framework: Destination Competitiveness

Cracolici and Nijkamp (2008) say that a tourist destination is at present often no longer seen as a set of distinct natural, cultural, artistic or environmental resources, but as an overall appealing product available in a certain area. What is significant about that fact is an urge to study how appealing is one state against another within that area. Identifying destination competitiveness attributes is a method of studying the destination in favour of industry practitioners and policy makers as well as a source of knowledge contributing to involvement of the government and private sector in the region, which helps to analyse pros and cons of tourism potential and development in the region (Ritchie and Crouch, 2000:18; Dwyer, Forsyth and Rao, 2000).

As Enright and Newton (2005) and Ritchie and Crouch (2000:1) assert it is important to create a context of determining competitiveness, that is, there is a need to establish a competitive set of attributes against which performance of a selected destination can be assessed from among the destinations in question. This would without doubt cater to the region chosen where-about the destination is geographically positioned and is further linked to attributes as mentioned by Cracolici and Nijkamp and more. Just as one way of measuring competitiveness of an industry or firm is by studying its market position, D'Hauteserre (2000) defines destination competitiveness as the ability of the destination to maintain its market position and share and improve upon them over time. Hassan (2000) also adds to maintaining of a market position by creating and sustaining value-added tourism products that would be linked to high visitor numbers and increasing destination income. Market position also signifies how the destination's products differ from countries having similar touristic characteristics to cater to its visitors in a flexible manner to meet their demands and experience expectations.

However, competitiveness can be measured over various attributes. Accessibility, price determinants, available facilities to experience the offerings of the destination are few other attributes that attract visitors to a destination. Destination competitiveness can be studied by analysing a destination's tourism potential according to a life cycle insight that is its ability to strive to sustain and introduce new attractions at the same time for visitors, economic prosperity as Crouch and Ritchie (1999) look at the socio-economic side of it by stating that a destination becomes competent on providing a high standard of living for its residents, maintaining of healthy relationships between key stakeholders and environmental sustainability to name a few.

In this context of growing popularity in Middle Eastern tourism, destination competitiveness is a key assessment indicator for each tourist destination in the region. In the light of GCC tourism, Bahrain's tourism industry is analysed through this theoretical destination competitiveness framework concentrating on areas of tourism policy and planning and destination management.

1.5 Methodology

The study has been conducted by obtaining secondary data as the source of data analysis. Data for this purpose has been obtained from websites of official organisations in the Kingdom of Bahrain being the Bahrain Economic Development Board, The Office of the Economic Representative of Bahrain (OERB) to the United States and the Ministry of Culture and Information. The data obtained has been supported by online press releases and academic literature. Additionally research information gathered by the researcher during a short research study period with a renowned Databases Agency has also been referred to widely.

These data are expected to provide an insight into the current situations of the country in context of the study and are relied upon to help analyse and recommend ways to develop and sustain growth and a competitive position in the short and long run.

1.6 Chapters organisation

This research project is organised into six chapters:

Chapter 1- A background overview of the subject to be researched and the applied approach is put forward.
Chapter 2-A literature review is drawn to understand the ideology behind concepts like that of destination competitiveness, tourism policy and planning and destination management so that they may be applicable to the practical knowledge being implied.
Chapter 3-The research methodology of this project is observed; how data has been collated and looks to be applied.
Chapter 4- An overview of the tourism industry of the destination in context is briefly reviewed.
Chapter 5-According to data reviewed, analysis and discussion utilising the theoretical frameworks studied earlier is done.
Chapter 6- Findings and Recommendations to the topic of study and further research are made to conclude with.

The study begins with the next chapter being of literature review of applicable theories in context.

CHAPTER 2 LITERATURE REVIEW

2.1 Destination Competitiveness

Competitiveness implies the effort and achievement of long term profitability which will be above the average of the particular industry within which they operate as well as above alternative investment opportunities in other industries (Buhalis, 2000). Porter (1985) views a competitive strategy as one that aims to establish a profitable and sustainable position against the forces that determine an industry's ability to compete within a region. Application of the resource-based theory to the explanation of competitiveness would lead to the explanation that competitive position would depend on a unique set of resources and the relationship between the contexts being studied (Melia and Manuel, 2003).
However Barney and Grant are quoted to add that the valuable nature of a resource should enable to identify opportunities to build which would lead on to become a source of competitive advantage (Melia and Manuel, 2003). And they could be thus linked over time to various perspectives of economics, marketing, price, quality, satisfaction and strategy (Vengasayi, 2003) leading to studies by various authors to further explore and determine competitiveness attributes in an industry. Destination competitiveness as a concept has led to recent studies over the years which try to inculcate the various dimensions towards studying the competitiveness of a destination through different perspectives just as any other industry; the tourism industry being considered as an alternative economic pillar in many regions around the world.

A number of frameworks have been built in recent times to help analyse the different facets contributing to competitiveness initially and destination competitiveness to follow. Initially Porter's (1990) four-part framework which was the result of general competitiveness being studied regarding business related industries and firms in few advanced and developing countries, was considered applicable to the tourism industry context as well. It included features such as factor conditions, demand conditions, related and supporting industries and firm strategy, structure and rivalry specifically related to an industry and has added two additional variables namely chance events and government which can influence any one of the determinants (as cited in Enright and Newton, 2005, Ritchie and Crouch,2000:14). Enright and Newton (2005) continue to cite available competitive frameworks such as Enright, Scott and Dodwell's (1997) framework divided into six categories of inputs, industrial and consumer demand, inter-firm competition and cooperation, industrial and regional clustering, internal organisation and strategy of firms, and institutions, social structures and agendas.

However, though these frameworks enable the background study of a destination's competitiveness, the nature of the tourism industry being a service industry and that factors affecting the industry are all inter-related, creation of specific and whole frameworks catering to tourism alone have been of interest over the years. As the tourism industry began gaining momentum as a chief economic driver around countries in the world, the necessity to develop particular competition determining frameworks was seen contributing to the inter-related nature of attributes of the tourism industry and the diverse characteristics owing to its development.

Key principles for destinations to achieve a competitive advantage were suggested by Poon (1993) being, putting the environment first, prioritising the presence of the tourism industry in the economy, boosting the channels of distribution in the market place and empowering involvement and contribution by the private sector (as cited in Dwyer and Kim, 2003). Crouch and Ritchie (1999) designed a tourism competitiveness structure around the generic models to form a four component model with components such as core resources and attractors, supporting factors and resources, destination management and qualifying determinants (as cited in Enright and Newton, 2005). The model seems to be constantly evolving with Ritchie and Crouch (2003) adding destination policy, planning and development to their earlier framework conceptualising the model on destination competitiveness (Figure 2.1).

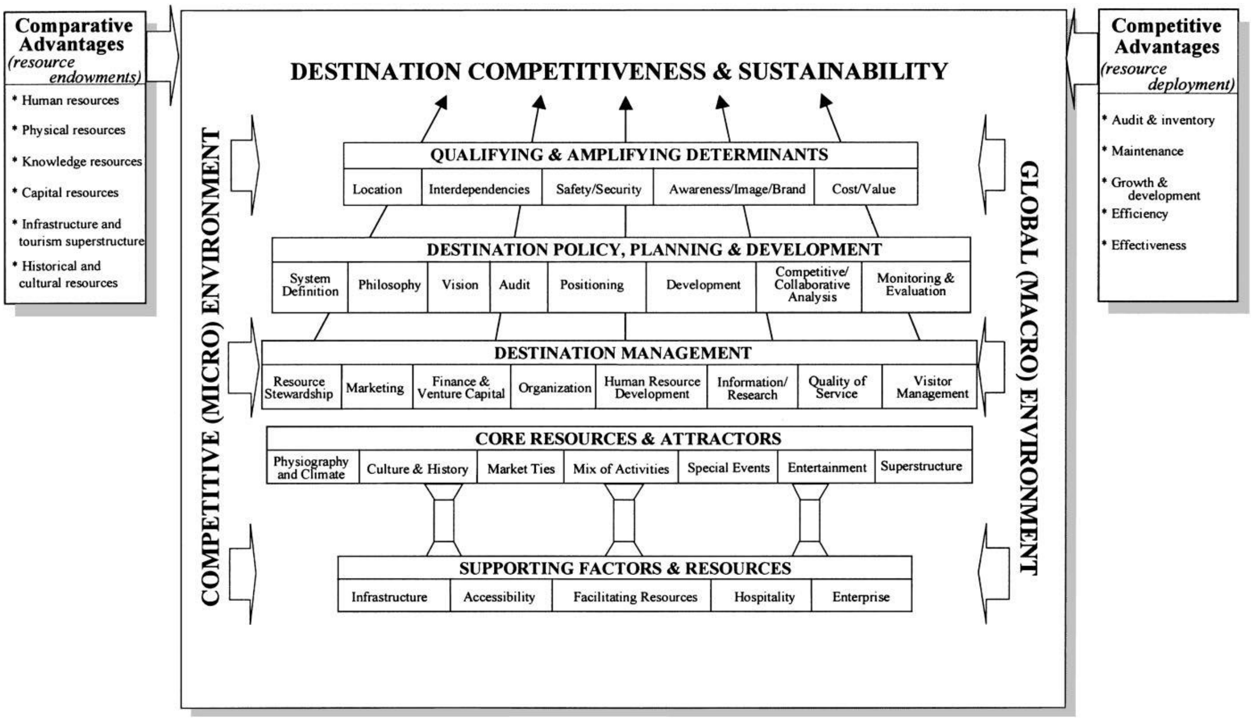

Figure.2.1. **Conceptual model of destination competitiveness (Source: Adapted from Ritchie and Crouch 2003).**

The authors have clearly stated that such frameworks and models should not establish the ground to make decisions but as a tool to assist in the decision making process and that these structures may not be perfect (Ritchie and Crouch, 2000:60) and hence should encourage decision makers to generate ideas and thoughts further than those initiated by these frameworks. It is important however to understand the nature of comparative and competitive advantages in determining tourism potentials in a destination (as asserted by Dwyer and Kim, 2003, as well) which has been well included in the model proposed here. Comparative advantages refer to the resources naturally and by nature of the destination created and endowed upon the destination whereas competitive advantages refer to ways by which the resources in a region are utilised, applied and maintained to set itself on a competitive platform amongst other destinations according to the context. However Kozak and Rimmington (1999) state that '*much management effort goes into establishing strategies and operating procedures which will lead to competitive advantage and to measuring performance against key competitors*' through benchmarking initiatives as most popular destinations around the world have passed the involvement phase of the tourist area life cycle and are evolving into the development consolidation or stagnation stages.

While the above mentioned factors contribute to the assessment of a destination's capacity to increase or sustain tourists' interest, the macro-environments and micro-environments also affects the flow of visitors to the destination thus differing from its competitor destinations positively or negatively. An example being the very recent phenomena of the global economic crisis and swine flu threats that has hampered travel patterns around the world. As Ritchie and Crouch state, stakeholders do not seem to prepare for such situations very well as they either do not see the changes happening around to tackle or enjoy the moment hence leading to the importance of monitoring and evaluation of the tourism environment in their control; a necessity on a continuous basis. Micro-environment changes on the other hand are comparatively easily identified by destination stakeholders as this forms the immediate ambience complementing the destination and its resources. Transport companies, travel intermediaries, labour supply, political stability et cetera imply few influences on the micro-environment (p.66).

The first stage in the model is that which indicates the importance of **core resources and attractors**, the common perceptions that help visitors' decisions to travel to a country such as scenic beauty, the weather, other natural resources; the distinctive culture abided by the people at the destination; mix of activities such as an educational trip inculcating adventure travel; events held exclusively through entrepreneurial or innovative strategies by the local authorities such as the United Arab Emirates' Dubai Shopping Festival taking place every year; entertainment arenas such as the Salzburg Music Fest, also including amusement or theme parks; superstructure being architectural wonders that attract visitors such as India's Taj Mahal. Ritchie and Crouch go on to mention *'almost complete destinations in themselves'* as superstructures such as Las Vegas and LegoLand in Denmark. The last component in this category is market ties which relates to the bonds through which a destination can positively attract visitors through visiting friends and relatives (VFR) tourism, religious tourism-a bond on faith, sports et cetera.

This category surely facilitates to the demand side of tourism offerings in the destinations, however, apart from the first characteristic being natural resources, that could easily lead to demand on proper maintenance and presentation, the others require initiative, innovation and efforts by tourism authorities so as to create demand for the destination which would prove to be a competitive advantage to the destination.

A sub-division to the first stage is the **supporting factors and resources** level which recognises the need for facilities to complement demand factors. They are infrastructure in the form of travel, accommodation, provision of activities, healthcare and the likes of the mentioned; accessibility in the manner of issues regarding visas or entry permits/open skies agreements making travel easier; facilitating resources being human knowledge and financial capital referring to the brain power behind projects and investments resources into tourism; hospitality and welcoming nature of local population and towards the idea of tourism; smaller enterprises catering to availability of various tourism offerings in the destination and finally political and governmental recognition of tourism's economic capability to enhance economic situations in a destination.

Further, as the other stages are looked into and studied, a need to incorporate the supporting factors and resources stage together with those stages will be observed as opposed to a discontinuity indicated in the model that is being discussed.

The next stage in the destination competitiveness model is the **destination policy, planning and development** stage which is considered as the driving force towards achieving a stable competent position among destinations. The authors have divided the topics under this stage into various sub-headings considering the depth of knowledge required to indicate the importance and the different dimensions as a successful tourism destination has the presence of a back-bone which dictates policies by a certain manner in which activities buzz in the environment. Policy formulation followed by effective planning to execute policies have a great impact on the stakeholders of the destination as, ultimately, it is the economic benefit to an area that matters with respect to well-being and welfare of the people. Proper implementation of policies and plans according to the context will lead to development of the destination's position as an attractive and well-managed one having set an aim or goal towards acquiring a market position. Collaborating with partners in order to provide the best of services and experiences has been considered an important aspect of this model which may be a destination management organisation (DMO) in support of another country's DMO or organisations such as credit card companies, holiday companies and similar organisations partnering the local DMO. Monitoring and evaluation of implemented policies or plans and maintenance of a destination audit to observe faltering or enhancement changes in the destinations performance is of utmost importance without which the objective of tourism in the destination can go un-noticed hence wasted.

The policy, planning and development stage is followed by the **destination management** stage, the authors having assumed the successful creation and implementation of a sustainable and competitive destination (p.183). Destination management has been divided into 9 components in the model each having inter-relating properties with other variables. However, management in all the mentioned areas are key without which the effect of plans and policies devised cannot be controlled and assessed. Destination management is evident at various levels in the hierarchy of a region's tourism industry from national level to city or municipal level. Through organisational, marketing, quality of service/experience, information/research, human resources development, financial capital, visitor management, resource stewardship and crisis management attributes together with administrative and other legal laws politically supporting management functions, a destination manager has the challenge to wise and sound utilisation of resources which will prove to benefit sustainable tourism contribution to the economy.

The **qualifying and amplifying determinants** form the final stage of Ritchie and Crouch's competitive and sustainable tourism destination model. Determinants in this category lead those studying the model to understand that the following variables indicate a certain quantitative measure of its presence in the degree of competitiveness in a destination- location, safety/security, cost/value, interdependencies, awareness/image, carrying capacity. However it can be said these determinants are among the top and most important concerns in the view of a visitor to a destination and very essential links that affect tourism in a destination from a destination manager's perspective and thus should be inculcated among the bases of the decision making process in order to assure tourists and assert a stable supply side on the part of the destination. Moreover it also can be said that this level is one that shadows each stage in the process of attaining comparative and competitive advantages over destinations in question.

Many industry experts have agreed that the Ritchie and Crouch model is one that broke away from competitive perceptions that mentioned only destination image and tourism products earlier hence it seems adequate a model to consider the different determinants of a competitive destination. Perhaps a more clear involvement of the supporting factors and resources and the qualifying and amplifying determinants in each stage and a clear representation of the inter-relationship would have led to an appropriately comprehensive framework to follow. However, the specific pointers of comparative and competitive advantages and the influence of macro-environment and micro-environments are highly commendable.

Destination competitive models have not been few though not many but few exceptions of commendable frameworks also having reached out to wider audiences so that it could be understood and applied accordingly.

According to Dwyer and Kim (2003) (Fig. 2) who develops a new model of destination competitiveness, studying both the comparative as well as competitive advantage in the context of tourism is considered important. The authors have very well described the different faces to destination competitiveness contemplating '*the main elements of national and firm competitiveness as proposed in the wider literature and the main elements of destination competitiveness as proposed by various tourism researchers, Crouch and Ritchie in particular*' and the inclusion of demand conditions as an important contributor to destination competitiveness so that a new model could be formulated. The fact that recognising destination competitiveness of a particular country, region or zone '*is not ultimate end of policy making but is an intermediate goal towards the objective of regional or national economic prosperity*' had been stressed by the authors.

Variables that are similar to those that form part of the earlier studied model will not be looked into in detail whereas new additions shall be reviewed. The components that form Dwyer and Kim's model are interconnected to one or another resource thus implying the continuous interdependency of resources and elements to finally result in a competent tourism destination. The elements are observed from left to right of the diagram; the first discussion throwing light on the **resources** cluster. The categories of this element consist of variables as that of the previous model's core resources and attractors' stage. Three main categories are seen-Endowed resources, Created resources and Supporting factors. These form the core resource base for a destination having indicated the presence and role of the natural bounties and the heritage values of the destination, the man-made infrastructure to support visitor population to these areas and factors in the form of financial, human and infrastructural capital to pillar tourist offerings.

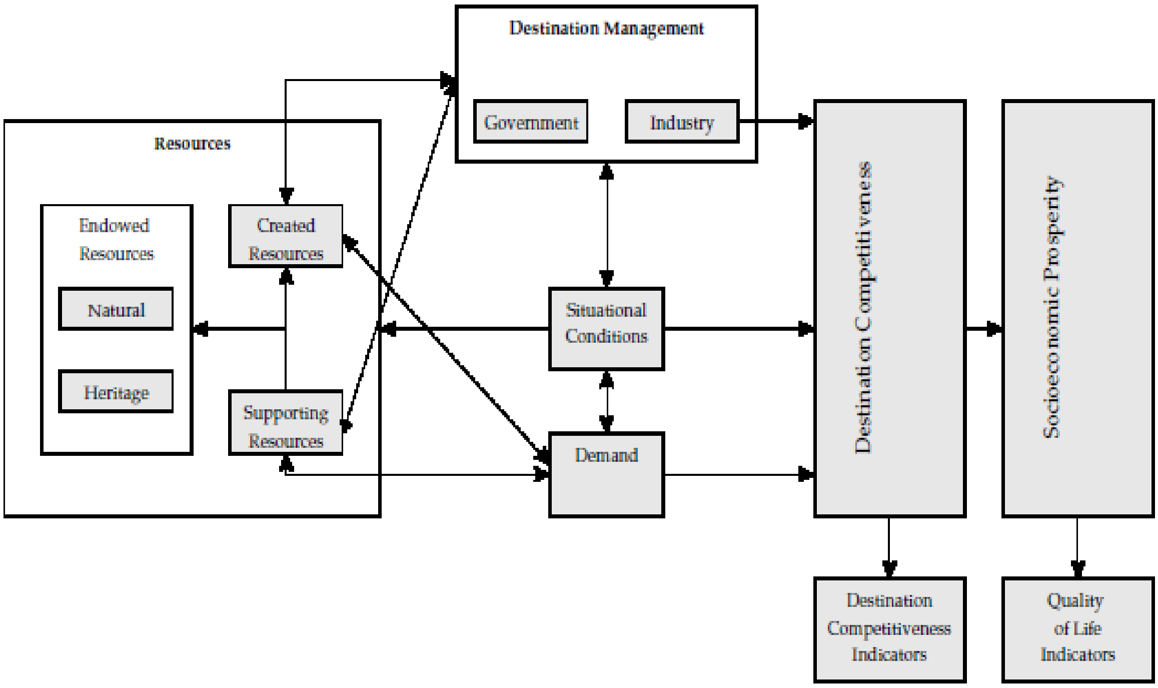

Figure.2.2 The main elements of destination competitiveness (Source: Adapted from Dwyer and Kim 2003).

While these resources amongst themselves affect the other's well-being status and potential support to touristic resources in the destination, it is affected by **situational conditions** due to external and internal pressure from the micro-environment and macro-environments of the destinations having impacts on '*economic, social, cultural, demographic, environmental, political, legal, governmental, regulatory, technological, and competitive trends and events...and present both opportunities and threats to their operations*' (Dwyer and Kim, 2003:379). However, the authors group micro-environment participants into the operating environment which consist of the private and public sector organisations in the destination and macro-environment participants into the remote environment, of whose elements cannot be controlled by the destination managers though they affect tourism in the region.

These situational conditions affect the **destination management** attributes comprising of the governmental and industries' roles in the management of players in the tourism industry. As defined by the World Tourism Organisation (2007), '*destination management is the co-ordinated management of all the elements that make up a destination (attractions, amenities, access, marketing and pricing)*' (p.4). The combined efforts of the public and private sector enterprises are a result of effective utilisation of resources available as well as situational condition that influences the destination (as mentioned earlier). **Demand conditions** that attract visitors to the destination through demand-awareness, perception and preferences are included in the framework. As quoted on p. 379 '*a destination's product must develop in a way that 'matches' the evolving consumer preferences, if the destination is to enhance or even maintain competitiveness*'. The variables of this category is largely connected to the marketing approaches undertaken by destination marketing or destination management organisations as it is an initial way of reaching out to target markets and changing or retaining perceptions and preferences prior to and after visiting the destination.

Inter-linked and inter-influential, the second phase of variables results into **destination competitiveness** which in turn as an intermediate element leads to **socio-economic prosperity** of the destination, both consisting of indicators which could be reviewed to study the process, the former's being the elements of the previous phases and the latter's being the quality of life indicators that can help in assessing the positive or negative impacts during the determining process. Just as Ritchie and Crouch (2003) have tirelessly stressed on the need of monitoring and evaluation Dwyer and Kim have continued to value its importance in the destination management functions on implementation; a number of authors and organisations having conducted studies specifically in this competitive context (Alavi and Yasin, 2000; Gooroochurn & Sugiyarto 2007; Hall, 2008).

While Ritchie and Crouch's model gives a detailed insight into the common determinants of a destination's competitiveness though having shown injustice to the links and interdependency between stages, Dwyer and Kim have compensated by providing a neat structure of elements however each element having hidden a number of underlying factors which have been clear pointers in the former model studied. Though the latter model is said to have inculcated demand conditions as an important contributor towards determining a destination's competitiveness, it is quite an essential condition that ought to be considered when preparing towards grooming a destination and analyzing its capacity towards a competitive stand thus the purpose being served in the model either way. However, it is commendable that both frameworks are comprehensive and serve the purpose of guidance towards a direction to achieve destination competitiveness and thus ultimately socio-economic prosperity.

2.2 Planning and Policy- works on policy and planning

'Planning is a multidimensional activity and seeks to be integrative. It embraces social, economic, political, psychological, anthropological and technological factors. It is concerned with the past, present and future' (Rose, 1984:45). Having understood the tourism industry's economic contributions to countries around the world, this 'multidimensional activity' is of premier importance in the performance of different sectors in the tourism industry. Hall (2008) states that the need for tourism planning and formulation of policies through government intervention is a method to curb unwanted effects of tourism development together with making destinations further attractive or competitive (p.10). He goes onto maintain that planning in tourism does not refer merely to development in tourism or promotional activities in tourism alone but should be integrated within wider planning processes so that development may be achieved through means that are economically, socially and environmentally viable...in a way that sustainable destinations are created (p. 17).

With regard to tourism planning, the issue is one with no less of contradictions to approaches. The approach led to fulfil planning issues within a destination have been suggested as criticised due to the lack of acknowledgement of sustaining quality of tourism and instead directing focus only and mainly to the economic vision to be achieved. This approach has been opposed by Burns (2004) who openly critiques a 'Tourism First' approach which implies a traditional planning method where participation in planning and decision-making bore no meaningful decisions as the planning process was seen to be a one off exercise that could not be reflected upon to measure its impact. He goes on to differentiate a 'Development First' approach (Burns, 1999) which inculcates social development and the 'Tourism First' approach which is an industry focus. The 'Tourism First' directive is one that embraces economic enhancements and strives to gain economically considering tourism as an industry that focuses on achieving goals set by outside planners and the international tourism industry, which does not necessarily imply growth (Clarke, 2009). On the other hand the 'Development First' approach is a more holistic approach which aims at developing human resources such that local people through local knowledge are encouraged to perform thus contributing to the economy in a sustainable manner. Nevertheless, the author comments on both approaches as extremes, the former being a wider perspective and the latter being one within locality limits.

Burns (2004) argues that there are flaws in tourism planning approaches and suggests to introducing Gidden's 'third way' (1998) methodology towards tourism planning (Figure 2) that inculcates views over five dilemmas being-globalisation, individualism, left and right, political agency and ecological problems (cited in Burns, 2004:28). Burns (2004) is of the opinion that tourism planning should be undertaken in an integrative manner and hence indicates an intra-sectoral view to plan in addition to the evident inter-sectoral planning route, stating examples of sub-sectors such as international hotels and ground tour operators whose problems go unnoticed on calculating economic multipliers (p. 31).

The author however does not hesitate to state that this third way approach may be one that cannot be considered in all countries as it also depends on the development status of the country and the position of tourism growth but also firmly adds that '*tourism can act as an example, showing that an industry built up through a stake-holding approach has a greater propensity for long term stability' (p.38).* While the importance of development is implied throughout the propositions made in the study the approach suggested is best applicable and effective as mentioned by the author as well in the pre-planning stage. It is important to involve the stakeholders in the planning process so that results achieved would be in favour of the governing authorities and local populations and industry players. However though the role of national tourism organisations and private sector participation has been mentioned, proper emphasis on the collaboration may have been put forward.

As Baidal (2004) studies regional tourism planning of Spain, he confirms that with tourism's *'different political and socioeconomic development environments, and the diverse scientific and technical contributions in the field's related disciplines (urban, regional, environmental planning, etc.)...different approaches to planning'* (p.316) would be considered. Having looked at the third way approach, being wider, broader and chronologically structured, another is that by Getz (1987), though a much differentiated and non-structured approach, one that takes care of important aspects including boosterism, economic, physical-spatial and community-oriented approaches (cited in Baidal,2004). Baidal (2004) contributes to the approaches adding the need for a strategic approach and sustainable tourism negating the pursuing the call for a process to be followed to achieve tourism development through planning. He also asserts that a strategic planning method would (a) help identify the need to analyse the competitive environment included in the destination's strategy, (b) provide a wider scope of time to plan and achieve objectives, (c) better co-ordination and cooperation among stakeholders and would move towards valuing planning as an essential and established component of management in the long run. Such an approach would undoubtedly follow en route towards instituting sustainable tourism.

As observed, together with the urgency to implement well-disciplined planning strategies in tourism, the main goals being stated by the works studied are sustainable tourism and better stakeholder participation and management. The World Commission on Environment and Development (WCED) issued the first report on sustainability, entitled ''Our Common Future'' which was supported by several international organizations (WTTC/UNCED, 1992; World Conservation Strategy, 1980; WCED, 1987; WTTC/WTTC/ECC, 1995) defining sustainable development as development that ''meets the needs of the present without compromising the ability of future generations to meet their own needs'' (WCED, 1987, p. 43) (cited in Choi and Sirakaya, 2006). Works in tourism literature have not been few (McIntyre, 1993; McCool and Moisey, 2001; Ritchie and Crouch, 2003; Weaver, 2005; Edgell and David, 2006). Sustainable tourism refers to the application of sustainability concepts at the tourism industry's environmental, social and economic levels which form the key dimensions of the concept (Hall, 2008:27). Choi and Sirakaya (2006) add that a holistic approach to sustainable tourism development should be ecologically responsible, socially compatible, culturally appropriate, politically equitable, technologically supportive and, finally, economically viable for the host community. It should aim to improve the residents' quality of life by optimizing local economic benefits, by protecting the natural and built environment and provide a high quality experience for visitors (Clarke, 2009). Hall (2008) continues to maintain that though activities by tourism at a destination maybe socially, economically and environmentally friendly, the greatest environmental impact may be in actually travelling to the destination thus observing that tourism development itself is setting paradoxes which are to be considered when setting for tourism planning (p. 19).

Sustainable tourism can be enhanced and expected in the long-run on observing positive tourism effects or impacts on local or national residents. Sautter and Leisen (1998) state a functional approach towards tourism which would see stakeholders interested in or affected by this business within a particular market or community collectively managing the tourism system. Jamal and Getz (2005) defines this collaborative effort as a joint decision-making one among key stakeholders which would help in solving planning problems thus indirectly aiding the management of issues regarding planning and development for tourism in the community. A long term economic linkage minimising negative effects of tourism on the natural environment and improving socio-cultural well-being of the destination communities should be established through sustainable community tourism (Choi and Sirakaya, 2006). A way to achieve this is suggested by Herremans & Welsh (1999) which is ethical responsibilities and codes of conduct must be accepted by all stakeholders of the community being governments, tourists, hosts, tour operators and other tourist-related businesses. While all stakeholders participate in the decision process, destination community managers and planners are responsible to deliver programmes regarding community development and provide political planning updates that raise awareness among all members (Sirakaya et al., 2001, cited in Clarke, 2009). As Raffay (2007) points out, statements delivered regarding community involvement in planning have been 'far from what reality has to offer (p.56) and quotes a more realistic and expected view towards participation in tourism planning by citing De Araujo and Bramwell (2000)(p.56); involvement in tourism planning in destinations can result in a one-way consultation process as collecting public opinion of stakeholders would be limited. Tourism policies formulated are to strategise methods and decisions on how planning is to be carried out, having assigned authority to communicate with the community region or area-wise.

The link of concepts to sustainable tourism does not end there. A further interrogation into the environmental aspect of sustainable tourism, eco-tourism, is an issue having been considered on a parallel note with sustainable tourism. Swarbrooke (1999) asserts eco-tourism as a different aspect along with other terms related to sustainable tourism which already includes environmentally friendly tourism. Fennel (1999) views eco-tourism as based on '*the maintenance of harmony between humankind and nature, the efficient use of resources and a spirituality that seeks to save resources from use rather than saving them for use*' (cited in Ritchie and Crouch, 2003: 38). However, successful sustainability of eco-tourism largely depends on influences of the local communities, benefits and ill-impacts that would encourage them to conserve and preserve such natural resources.

Stronza and Gordillo (2008) discuss the benefits, economically and otherwise, that the communities observed during their study on three Amazon eco-tourism projects have experienced on the introduction of eco-tourism as an industry. It has been stated that though eco-tourism has been designed to benefit communities, economically, profits leak from operators outside the community and though tourists pay hefty for eco-expeditions, tour operators do not share this with local communities (Landell-Mills and Porras,2002, as cited in Stronza and Gordillo, 2008). These imply a major problem as incentives to conservation are shortened. Also, emphasis has been laid on mentioning non-economic benefits such as participation of local people in ownership and management as this would lead to eco-tourism's real connection to conservation.

As Marcouiller (1997) asserts evaluating effectiveness within a community or regionally is a necessity as every change or impact of a newly introduced concept is best monitored and evaluated. With every plan introduced in the tourism policy of a destination, measures to monitor and evaluate the process as implementation takes place is key, so that analysis can be carried out on results obtained as and when a plan in introduced, in short, continuous monitoring and evaluation is important. The evaluation process should seek to benefit not only to the destination management organisations alone on assessing its programmes but also to stakeholders which will further lead to a positive and transparent management process (WTO, 2007:142). Indicators regarding quality of life of residents, economic indicators measuring balance of payments, GDP, production consumption activities, employment levels of residents and the likes are of prime concerns. Ried, Mair and George (2004) suggests can be done with the help of a self-assessment instrument where communities can map out tourism in their jurisdictions as it initiates discussions with participants and they contribute to designing successful planning strategies. It also generates an emotional commitment and the locality would contemplate a community-centred approach to its activities.

2.3 Destination Management

Having studies few works in the contribution to literature considering the policy and planning aspect, it is the destination management platform that observes the proper implementation of those plans towards a successful and competitive destination. The concept of destination management has been evolving over time with broader perspectives being laid. As different dimensions to a destination are being studied, bringing together and amending all loopholes that lead to destination development has been the main focus. Following up on Ritchie and Crouch (2003), destination management was a lately added concept which added to detailed analysis of a destination's resource management. Apart from the inevitable role of marketing of a destination, focus on quality of service/experience, visitor management, crisis management and resources stewardship were brought forward into the light. Just as analysis of potentials and on-going performance of an organisation is considered through framing of plans and implementing of policies, so is the approach considered towards a destination, with of course the destination as the product and its attributes being managed as that of an organisation, towards prosperity. Literature published towards the implementation of the destination life cycle analysis, the marketing-branding-image creation of a destination and the importance of human capital towards tourism development as discussed further.

As stated by WTO (2007:27) assessing the current situation faced by the destination so as to design and strategise a plan toward effective management is a key task. Not any and every success factor as seen in one destination may be applied to another destination as lots of factors, being, social, political, economic and technological factors may be different. Or as Kozak and Rimmington (1999) states *'benchmarking destination performance is therefore problematic since so many different elements contribute to tourist satisfaction'*. In addition to the study of the macro-environment affecting the destination it is also important to assess existing and potential tourism resources such as current infrastructural facilities, current experiences and services offered, human and financial resources, market trends and performance.

2.31 Destination Marketing

Ritchie and Crouch (2003) assert the marketing function of a destination as '*perhaps the most traditional'* (p.73) of activities. The role of marketing in destination management is to an extent the best indicator of destination development (positively or negatively) as the number of visitor arrivals to a destination can be greatly influenced by the marketing campaigns that may have welcomed them. Destinations aim at promoting their tourism products and reaching out to target segments thus broadening tourism horizons within the region. As cited in Pike (2008:3) a number of texts have been published relating to destination marketing and its different aspects such as study of destination marketing organisations, promotion, destination branding and crisis marketing by Wahab et al (1976), Heath and Wall (1992), Pearce (1992), Morgan at al. (2002, 2004) to name a few.

Buhalis (2000) has contributed to tourism marketing literature a brilliant article which assists in ideas to '*Marketing the competitive destination of the future*' emphasising that marketing a destination should be such that it abides by policy frameworks laid down for the destination and complements the development plan set for the region. The author goes on to briefly state the distinctiveness between tourism marketing and planning, as there is an issue that one attribute does not support the other; marketing approaches seem to ignore the need for focusing on societal or environmental demands as attracting more number of tourist and increasing visitation are set as premier goals, on the other hand, planning and policy studies do not appreciate the need for and responsibilities that a destination marketing organisation ought to have in a region by *'often ignoring the market dynamics and the requirements of entrepreneurs at the destination and the place of origin (Ryan, 1991b; Burns, 1999)'* (Buhalis, 2000:98).

While destination management organisations set up the organisational structures, define roles and responsibilities among stakeholders in the destination and manage budgets towards tourism development (Ritchie and Crouch, 2003) destination marketing organisations work solely towards promoting and creating a brand image for the destination which in turn would create awareness among different target markets. Destination marketing organisations are defined as- '*the organisation responsible for the marketing of an identifiable destination. This therefore excludes separate government departments that are responsible for planning and policy, and private sector umbrella organisations.'* (Pike, 2008:31). Buhalis (2000) opines that a major challenge faced when formulating a marketing strategy is studying the possibility of inclusion or deletion of a destination's already known history, image and legacy development as a tourist may already have a perception (good or bad) about the destination owing to the mentioned attributes. Echtner and Ritchie (1999) add that marketing destinations have become more of a challenging activity with the growth of the tourism industry worldwide as consumer decisions cannot be easily influenced as before. Various travel options and diverse activities to choose from, available time and disposable income in addition to the competitive performance of destinations to lure tourists are few reasons. Echtner and Ritchie (1999) continue to say that a successful positioning strategy of a destination would help the perception or image creation of the destination (citing Calantone et al, 1989). This could be done through promotion in the targeted markets such that the destination scores through favourable differentiation from other competitors and also possibly sets a positive position in minds of consumers, giving it a competitive edge.

2.32 Destination Image and Branding

This concept directly relates to the marketing concept of branding a destination. Williams and Palmer (1999) state that brand image is considered a pivotal aspect of a destination's marketing strategy. It is only apt to quote the words of Jack Trout, the originator of the positioning concept: '*Competition is not a battle of products or services, it is a battle of perceptions in the customer's mind*'; as WTO (2007) explains those lines, in spite of offering the best of products and services, unless a perception of a unique and worthwhile experience than other destinations in the minds of visitors is created, attracting tourists will be a greater and tougher task (p.42). However, it is necessary to agree to the fact that destination branding is a difficult task as a number of components in the form of attractions, infrastructural facilities, culture and heritage attractions and the natural environment (Pritchard and Morgan, 1999) are to be considered so that a single brand image would appeal to tourists but at the same time provide a wholesome picture of the destination's offerings.

Pike (2005) explains the complexities of branding a destination. He outlines six issues on developing a brand for a destination the challenge before destination marketing organisations being *'places are becoming increasingly substitutable and difficult to differentiate'* (p.258). The arguments are put forth this way; firstly, the multiplicity of factors that contribute to highlighting the image of a destination should be associated in a way lot of ideas about the destination are conveyed through the slogan, which probably is the best way to position the uniqueness of tourism in that region. Secondly, it is a challenge to create a brand to cater to all potential geographic target markets through a single message that encompasses its touristic attributes. Thirdly, as Pike quotes '*the politics of decision making*' towards a brand theme observes the involvement of public and private sector players in the industry; a platform where a possible debate over positions held could occur. Fourthly, the decisions over creating a brand is one involving local stakeholders very importantly that is considering their contribution as well towards delivering what the brand promises, without with visitor retention cannot be guaranteed. Fifthly, evaluating and monitoring destination brand loyalty as with consumer goods is a complex task as maintaining communication and records of hundreds of visitors to a destination is quite impossible. Finally, funds to aid brand management are scarce as destination management organisations are to look for sponsors to improve or introduce an existing or new brand respectively as these organisations do not directly benefit from the success of a destination brand.

Pike (2005) has stated that the literature works on branding of a destination are few. Thus, on covering these complexities, the author has touched upon not only the pure marketing perspective of a destination's brand but has also analysed the role and impacts of stakeholders in the process, asserting that the success or failure of a destination brand to an extent influences success or failure of tourism in the region as expectations met and promises delivered are the key factors towards tourism development.

Apart from the destination brand that is portrayed which is the physical image through a logo or slogan relevant to the destination's tourism attributes, the image formation through which visitor perceptions are made before or after a visit to a destination is also of key importance requires deep understanding by destination management organisations. A destination image is defined as '*an attitudinal construct consisting of an individual's mental representation of knowledge, feelings, global impression about an object or destination*' (Baloglu and McCleary, 1999). Bandhopadhyay and

Morais (2005) mention the importance of touristic representation and destination image-making as factors that influence the decision-making behaviour of potential tourists and the levels of satisfaction regarding their experience. However, though the image of a destination is first advocated by the destination itself, tourists' perceptions of that image or representation is what matters as they are targeted to experience what the destination offers. In case of destination branding as well, that is creating a logo or slogan, this viewpoint, that of tourists to the region is an important consideration to evaluate as existing brand or introduce a new one. As Prentice (2004) affirms, such an approach would also lead to relationship building and development of imagery such that the tourist familiarises with the destination that it becomes part of lifestyle. Also in an environmental perspective, attitudes towards consumerism have changed and people are more environmentally friendly and ethically correct (Hu and Wall, 2005). Visitors thus seek high-quality attractions which positively leads such destination to manage their resources efficiently. It is thus understood; that the relationship towards better destination management is mutual between the destination managers and its guests, as quality services and experiences that are sought after by visitors encourages stakeholders in the destination to provide for the same.

2.33 Human Resource Management

Among the many destination management focus areas, an important one is human resource development/management. It is however an attribute that has yet to be recognised as an important factor driving the tourism industry of a destination. It underlies the fact that tourism experiences are intangible and that human capital impact the destination experience through the performance and interaction of industry personnel with visitors. Moreover, the labour intensive nature of the tourism industry indicates the necessity of skilled personnel as it influences the quality of service deployed. Thus in the absence of the right resources competitiveness of a destination would be tough to manage and maintain.

Baum (2007) quotes off from Ireland Tourism's Failte Ireland human resource development strategy, *'The story of successful tourism enterprises is one that is largely about people—how they are recruited, how they are managed, how they are trained and* *educated, how they are valued and rewarded, and how they are supported through a process of continuous learning and career development'.* Ritchie and Crouch (2003) state that though destination management organisations have less control over human resource development in a destination, they play a very important role in supporting education and training programmes to develop and encourage participation of local population in the tourism process (p.211). The human resource sub-sector of management is observed to be evolving in the general employee management concept globally with remuneration, training, employee appreciation, employee participation and involvement in decision-making et cetera changing for the better in different industries, but, with the least of change occurring and breaking through in the tourism industry (Baum, 2007). However Baum and Szivas (2007) do not ignore the fact that efficient and valuable management and utilisation of workforce is possible only through proper planning and in the favour and support of the local, destination and national level of the area considered.

Liu and Wall (2006) learn that the issue of human resource development is currently being integrally considered as part of national tourism plans though the focus has been narrowing down towards the hospitality industry's staffing requirement. As Ritchie and Crouch (2003) state, education programmes that encourage and stimulate existing and potential employees addressing the skills required in the tourism and hospitality industry are very essential and favourable (p.74) as the tourism industry world-wide is at a growing rate. Riley et al. (2002) (as cited in Baum and Szivas, 2008) raises apt issues regarding the investments into tourism education in most countries by questioning the nature of the educational and training approaches put forward. The authors suggest that educational results should consider the importance of gaining experience through operational roles in the industry, which would further aid the relevance and purpose of the course at all; the main objective being '*enhancing the quality of knowledge and skills at all levels*'.

Acknowledging that the contribution of education and training in the tourism context is a major concern, Singh (1997) attempts to suggest few methods through which education and employment in a region would benefit the human resource sector. The author suggests a study of the right differentiation between education and training to begin with, to understand the mutual implementation of both attributes towards successful employability. Also, a platform such that public and private sectors conduct training programmes and in a method that educational curriculums are designed to have the strong backing of industrial players should be created. Singh continues to explain that this approach will also enhance the *'two-way interaction between the supply and demand sides of human capital'* so that better connections between the industry and education/training systems are established. It is commendable to mention this suggestion of the author to welcome the participation of students in the research activities of projects undertaken in the industry, a learning opportunity being created for the former and an interacting and employment opportunity for trade players. Through her work, Singh implies a number of useful suggestions to cater to moulding human resource in a destination.

People are a critical dimension within the successful delivery of tourism services thus asserting the fact that human resources should be regarded as key to achieve competitiveness of a destination. Attitudes that exist towards employment in the service industry that the industry requires few skills and that suitable human resource placements are not much of an issue, exists towards the tourism industry as well.

However, the main question comes back. How many countries/destinations actually include the need of human resource development in their tourism plans and policies? And if included, how many of those public and private enterprises actually make efforts to include and encourage the local population to participate in developing the economy through tourism? A well prepared wholesome research project/report is yet to be considered and published leaving behind the importance of the sector towards development.

CHAPTER 3 RESEARCH METHODOLOGY

3.1. Research in Tourism Studies

Veal (2006) distinguishes between scientific and social science research (p.2) as scientific research being based on logic and reason by systematically examining evidence thus favouring most in physical or natural sciences research such as physics or chemistry. On the other hand, social science research deals with people and their social behaviour which is constantly changing and thus it is difficult to replicate data or provide similar results (p.3). This resonates the applicability of social science research to tourism studies owing to the changing scenario in concepts and practise around the globe and the change in customer patterns and perceptions influencing the industry.

The debate between which research method is approachable is also on-going regarding qualitative or quantitative research. However both research methods have contributed and continue to contribute to empirical findings in the field of tourism research. Initially research in tourism was largely associated to quantitative research with works resulting in quantifying and statistically analysing trends in changing visitor patterns and numerically establishing results to study tourism development in a destination. Jamal and Hollinshead (2001) say that social science research is presumed to move from more static, quantitative and positivist knowledge to more dynamic, experiential and reflexive approaches accepting that human beings actively contribute to knowledge constructions, the diverse research strategies and approaches; which indicates the increasing use of qualitative research in tourism studies. Furthermore, Walle (1997) acknowledges the fact that quantitative data in the form of statistical tools are being supplemented with qualitative methods as one method alone fails to facilitate purposes of study as intended by tourism scholars.

3.2 Research Approach and Strategy

Ghauri and Gronhaug (2005:15) state the presence of two approaches in research that aid the establishment of a link between the research and the data further helping to draw conclusions; they are deductive and inductive approaches. The authors study further that while the deductive approach includes understanding of theories after which it is logically accepted or rejected, the inductive approach leads to creating new theories and hypothesis on studying theories already developed from empirical observation. This current research study seeks to follow the latter approach; that of inductive study.

The research strategy favoured is the qualitative means of research as it rejects scientific norms and places emphasis on words rather than quantifying data. Moreover as Gilmore and Carson (1996) state using qualitative research methods enables adaptability and flexibility in the research process. The authors briefly explain the feasibility of qualitative research method usage during each stage of the research process as follows; in the exploratory stage the researcher familiarises with the area(s) of interest because of the open-ended nature thus leading to better understanding of the topic; on developing the research design formulating a flexible plan of action allows introduction and consideration of new ideas or themes of interest which would help the researcher to connect, combine or relate the relevant topics; the involvement of the researcher during the study process aids development of analyses and interpretation of data in a better way.

3.3 Research Methods

Methods of collecting data to obtain information that answers research questions refer to research methods. The two main types are primary and secondary data; the first of which is first-hand information collected and the latter being sources of data that already exist and are referred to when preparing any text.

The main source of data collection for the purpose of completion of this report is secondary data collection. As Stewart and Kamins (1993) state secondary information is a compilation of information collected by others and documented on presentation; a few sources being government reports, industry studies, archived data sets, syndicated information services as well as traditional books and journals found in libraries. In addition to that Bryman and Bell (2003:328) highlight the advantages of using secondary data analysis as follows:

- The analysis offers the prospect of having access to good quality data from government archives, departments and other reliable sources of data.
- Most of the data generated and analysed by highly experienced practitioners and researchers with procedures to check on the quality of the emerging data.
- Cost and time are important factors when considering a research project and secondary data collection and analysis is apt to meet tight deadlines.

Adams et al. (2007) state the importance of documentation when collecting data which is has been an importation function during this research process though documents and data referred to were internet sources. Moreover analysis and references to statistical data in this research project have been largely gathered from a renowned databases research agency also dedicated to providing information for the tourism industry players. The researcher had been part of an 8 week project that has enabled the growth of this study as some data and analysis will be done with the help of the consensus drawn from that research project. Desk-based research has been greatly implemented by the researcher in this context.
Additionally, based on each objective towards the study a variety of secondary sources have been implemented throughout the project. Considering the tourism planning methodologies being implemented, information available from the various tourism board websites as well as ministries under which tourism as an industry is considered have been looked at. Moreover, press releases which would indicate initiatives that would contribute to tourism planning and evolution of policies would provide further insight to aid the study. In order to comprehend tourism planning and policy, academic books and journals will be referred to.

The second objective that deals with tourism development in Bahrain and other GCC countries will also be studied by reviewing information available from the official websites. Statistical information is of relevance in this area. In the case of Bahrain, official organisations such as the Bahrain Economic Development Board provide statistical information about the country's trade and non trade activities and so statistical information will be drawn from the same. Trends can be analysed from various press releases such as the national newspapers and well as the travel industry's online newsletters. Reliable reports such as those based on analyses done by the World Economic Forum and the World Travel and Tourism Council will also be depended upon for research. Finally, to help identify approaches to destination management, various areas of destination management will be researched; a few topics covered include human resource management, marketing, sustainable tourism. Available books and journal articles for sound theoretical knowledge will be applied here. This will also include study of case studies so that similarities maybe drawn upon and analysed. However, it is important to study key trends in the selected areas which would inform the researcher about recent developments and opportunities and to analyse shortcomings/failures and positive aspects of destination management.

This research methodology has been applied to gather data obtained which will be viewed in forthcoming chapters.

CHAPTER 4 REVIEW OF DATA

4.1 Bahrain's Tourism Sector

(Numerical Sources of Data: Euromonitor International 2009)

Tourism in Bahrain has been booming over the years having resulted in an important contributor to economic conditions in the Kingdom. The unique blend of a modern Arab world having balanced the ability to maintain and sustain its authenticity as well as open doors to foreign participation in the economy is its success mantra as the freest economy in the Middle East and one that encourages outsiders to experience and value Arabian hospitality. Bahrain as a tourism destination attracts the third highest number of visitors in the GCC after Saudi Arabia and the United Arab Emirates owing to 16.5% of total arrivals to the GCC in 2008.

Bahrain saw over 4.5 million in 2008, a figure which is expected to rise to over 6.4 million by 2013 at a growth rate of 6.2% over the forecast period of 2008-2013. As quoted by Essa Hassani, senior marketing specialist Bahrain seeks to retain visitor focus on those from the GCC which currently forms 90% of the market (bahraingateway.org, 2009). Of the GCC states undoubtedly Saudi Arabia covers majority of the market accounting for over 3.1 million tourists in 2008. The Saudi Bahrain Causeway is the most accessible form of transport. Visitors from Saudi are usually weekenders to the Kingdom who come to enjoy the relatively liberal leisure atmosphere and activities and visiting of friends and relatives. This market is an important one for Bahrain and sees no obstacle that would change demographics. The reasons to other Arab states visiting Bahrain also pertain to the liberal attitude of the government and peoples in the country. This also further encourages Bahrain to provide the best towards family tourism as an emerging and potential market. Kuwait is another potential market from the GCC states.

Among Asian countries India and Pakistan contribute most because of their significant labour share in these Gulf countries and in Bahrain. They constitute the outbound market as well because they travel home at least once every year. Visitors from India are studied to grow by 6% by 2013 also through the arrivals in the visiting friends and relatives segment. Of Western countries attracted to Bahrain, the US and UK remain favourites. In addition to the travel behaviour of Americans and British to explore and experience new traditions and cultures the proportion of Western workforce in the country also contributes to tourism by these markets. Nevertheless with air transportation continuing to favour tourism arrivals into the country, through increasing number of flights plying into the region and raising frequencies of those in operation tourism is only further invited and encouraged by authorities in the Kingdom, a new segment being cruise tourism.

4.2 Bahrain's development as a tourism destination

Considering tourism in the Middle East it can be said undoubtedly that Dubai has been spear-heading the Arab tourism industry trends from the very start, rather, rightly put in, though Saudi Arabia has been welcoming pilgrims to the Kingdom over decades (recognised as religious tourism according to recent tourism literature) the apt term and framework given to a vision specifically for tourism had been considered seriously and implemented by Dubai. The early efforts of states such as Bahrain to set up a Tourism Department in 1975 (Mansfeld and Winckler, 2008) cannot be sidelined but it is only right to mention that innovative, differential and focussed goals were not set as done by Dubai. Tourism in Bahrain took off on the opening of the King Fahad Causeway linking Saudi Arabia in 1986. However it is only in recent times that the fellow GCC states are foreseeing the tourism industry as a non-oil profiting industry, a similar case as to those of Bahrain and Oman, Bahrain having prioritised the sector through a national charter only at the dawn of the millennium.

As outlined among the objectives of this dissertation, a general over-view of the role and involvement of the various players in the tourism industry will be analysed. Tourism planning and policy in the state, a brief analysis of Bahrain as a tourism destination along the destination life cycle and destination management in the country will be studied. However the consensus is to arrive at the competitiveness level to which Bahrain can aim in future, which will be looked at in detail in the forth-coming chapter.

Due to lack of cooperation for provision of interviews from Bahrain's tourism resource persons and the unavailability of time to conduct an in-depth chronological study of tourism plans and measures implemented in the country, the researcher has abstracted information from the work by Mansfeld and Winckler (2008) titled *'The Role of the Tourism Industry in Transforming a Rentier to a Long-Term Viable Economy: The Case of Bahrain'*. Other sources include press releases, accessible information off official governmental websites and information collated if applicable during the research project with databases agency Euromonitor International.

Mansfeld and Winckler (2008) briefly state that Bahrain had long realised the potential of the tourism industry towards economic contributions thus having set a Tourism Department as early as in 1975, but the authorities did not hurry on tourism activities nor did they invest greatly into resources considering it a risk that the consumers targeted may not respond positively to the initiatives. However a decade later following a fall in the oil prices that affected revenue, tourism was brought back into the spotlight in an aim to further diversify the economy with the establishment of the Supreme Council for Tourism under the guidance of the Ministry of Information. This committee also included the involvement of public and private sector parties. In the course of time policies relevant to tourism were formulated towards being more flexible in nature like the 'open door' tourism policy where visitors could obtain seven days visas than the previous three days visas at the airport upon arrival. In the current scenario the visa system with the help of information technology has made travel for tourism purposes to a great deal easier and convenient for a tourist by the provision of e-visas though terms and conditions of stay vary from one country's national to another.

Tourism in Bahrain does not see an umbrella structure of relevant organisations collaborating in the industry but individualised efforts by public and private sector participants. It was the Bahrain Promotion and Marketing Board (BPMB) that was initially the marketing and promotions board for tourism abroad. The Board was also engaged in activities to promote Bahrain as a region of business and thus encouraged investments through other economic activities as well. The BPMB has been recently established as the Bahrain Economic Development Board (BEDB) however the functions remain the same. While enhancing the country's image as a favoured business state in the Gulf, tourism is also benefitted by the incoming number of business arrivals encouraging business tourism and the MICE segment which could also positively impact revenue and participation in leisure activities.

The tourism strategies which are being developed along-side the country's national economic strategies are highlighted in the BEDB'S 2008 annual Operating Review. The report cites the integrated efforts of the National Economic Strategy 2009-2014 towards achieving the Economic Vision 2030. Vision 2030 seeks to '*embrace the principles of sustainability, competitiveness and fairness to ensure that every Bahraini has the means to live a secure and fulfilling life and reach their full potential*' (p.22). And to achieve these objectives each ministry in the country are to set out guidelines based on the Vision which would ensure sustainable long term growth and societal prosperity in living conditions. The National Economic Strategy on the other hand further stresses its guiding principles as those that would balance the employment status pattern between the private and public sector by strengthening the former; by diversifying and introducing innovative measures towards maintaining a sustainable and knowledge-based economy and by creating the right skills for the right people at the right time (BEDB Operating Review, 2008:22).

By referring to the core values through which Bahrain's tourism economy is being strategized along, Bahrain's economic progress can be evaluated with the help of the reports such as the World Economic Forum's Global Competitiveness Report to begin with. On studying the contribution of economic sectors to GDP, Bahrain contributes 56.3% to the service industry followed by 29.3% to the non-manufacturing industry, 14% to the manufacturing industry and the remaining meagre 0.4% to agriculture. Compared to the other GCC states it is Bahrain's and Dubai's economic growth that favours the service industry most, while other states benefit from the service industry only secondarily to either non-manufacturing or agricultural industry. This clearly indicates the role of non-oil industries in these countries as they aim to diversify understanding the potentials and opportunities in industries such as finance, transportation and logistics, tourism, information and communication technology, real estate and manufacturing (Euromonitor, 2009) to overcome threats in the backdrop of an oil crisis.

The World Economic Forum recently named the Kingdom's government as the seventh most financially efficient one on the planet (gulf-daily-news.com, 2009). From a micro-economic perspective as obtained from BEDB's Operating Review (2008) Bahrain's financial sector in 2008 accounted for 20.5% of the total GDP while the tourism industry accounted for 12% of the GDP (bahraingateway.org, 2009) which indicates the close importance of tourism as a revenue earner to the country. The new attraction of the Bahrain Financial Harbour which seeks to '*reinforce Bahrain's unsurpassed position as the leading international financial centre of the Middle East*' (bfharbour.com, 2009) also adds as a tourism attraction to the itineraries of the Kingdom because of its splendid infrastructure and visitor friendly facilities to offer. The government is thus confident of its ability to sustain economic growth through these sectors.

Another important factor that drives the competitiveness in nurturing economic growth is the creation of employment opportunities or employee development for the Kingdom's nationals. The government has been considering this as an important strategy for growth over the years with an aim to involve nationals in the industries favouring the economy. Despite of the recession and tough job climate in 2008 worldwide which is still finding time to settle down, a total of 568,307 people were in employment in the country which is an increase of 14.8% on 2007 figures (BEDB Operating Review, 2008:15); a hike in nationals entering employment being 7.7%. Furthermore the Labour Market Regulatory Authority (LMRA) and Tamkeen- a labour fund independent authority together with the EDB aim to invest into and support the employability and development of the country's human resources. In 2008, of the US$ 42 million invested into the different sectors in the economy towards training and development, US$ 1.2 million was invested to fund schemes within the hotels and restaurants sector of the economy and an initial investment of a new scheme being the Gulf Air Worldwide Call Centre initiative of US$ 204244 was made (Tamkeen Annual Report 2008:16). The 'Specialised Training for Skills Gaps' with respect to the tourism and hospitality sector aimed at providing funds for over 1800 Bahrainis in 2008 according to the specific levels or positions held in employment. It should also be noted that while in 2007 Tamkeen together with the other government authorities funded the Hospitality Management Programme with an amount of US$ 325,188 which increased to US$ 2.3 million in 2008, indicating the need to progress and professionalise employees of the tourism and hospitality industry to improve and sustain quality of service.

Pertaining to the data reviewed in this chapter, an analysis of Bahrain tourism industry in order to study its competitiveness will be undertaken in the next chapter. It should be maintained that analysis done will be highly dependent on information studied in this chapter.

CHAPTER 5 ANALYSIS AND DISCUSSION

5.1 Competitive Framework Analysis

Cracolici and Nijkamp (2008) rightly state that tourists view a tourism destination as an integrated and compound set of facilities available for their utility services and hence destinations are challenged to manage and organise their resources efficiently to outperform alternative choices of destinations offering similar products. The authors continue to say that tourist areas are a *'set of specific physical, natural, cultural and human resources, which are rare, inimitable and non-substitutable and can generate capabilities which become useful to create and develop competitive advantage (Barney, 1991)'*. As it is being studied Bahrain's set of tourism resources, how different or unique are they when compared to states in the region that are bound by the same products to offer?

The competitiveness framework followed to analyse Bahrain's tourism competitiveness against the other GCC states will be the Ritchie and Crouch (2003)' conceptual model of destination competitiveness. The reason why this model was chosen for analysis is that it recognises the importance of demand conditions (Dwyer and Kim, 2003) in studying destination competitiveness which is the same approach the researcher seeks to conduct analysis.

Dwyer and Kim (2003) point out that there are opportunities to research different types of indicators that pertain to different contexts/levels in which a competitiveness model can be applied. Ritchie and Crouch have comprehensively charted out the attributes that could be considered important to analyse a destination's competitive stance and hence the model is favoured to research Bahrain's competitiveness against the other GCC countries. However due to the geographical nature of the country and due to the unstructured nature of the tourism industry, not all variables may be applicable to this context. Thus, together with deletion of attributes that complicates the analysis in this scenario, tourism resources in the country will be examined against other GCC states in the region, the biggest challenge being that at an immediate level the GCC states have similar tourism offerings.

A brief Comparative and Competitive advantage study

Every tourism destination will be analysed and evaluated by the resources it has to offer in order to satisfy an enthusiastic tourism, moreover, it is important to retain that image even on departure of the tourist to expect him back in the near future. Similarly there are particular attributes of Bahrain tourism that probably stand out as a unique experience for tourists and those that are potential attention seekers that could encourage them and further invite them to the country. A few comparative and competitive attributes will now be briefly viewed for Bahrain and will be revised against the other GCC states. These directly affect the strategic competitiveness framework that is being studied in this context.

Comparative advantages of Bahrain tourism

a. Heritage and Culture

'*With a heritage over 5000 years old, Bahrain is replete with historical landmarks that are an explorer's delight'* quotes a brochure to experience Bahrain by one of the leading travel retailers in the state, Algosaibi Travel. From museums to forts to archaeological wonders Bahrain is a blest destination with rich and valuable heritage resources. Archaeological remains of historical forts such as The Bahrain Fort, Arad Fort and Riffa Fort have stories of settlements to say of when cities were excavated around them. Additionally, the Bahrain Fort was declared as a UNESCO World Heritage Site in 2005. Other sites of archaeological importance are the Al-Khamis Mosque famous for its twin minarets standing high. The Ancient Burial Mounds which date back to the 3rd Millenium B.C is a Bahraini wonder which is perhaps the world's largest prehistoric cemetery (bahraintourism.com and bahrainguide.org, 2009). The museums are added houses of knowledge that enhance the study of the wealth of the Kingdom. However there is a need to educate the nationals and residents of the country about the rich heritage they procure. An effective and wise strategy being implemented by the tourism authorities in the region is the staging of highlighted annual events at these sites, such as the Gulf's biggest and most diverse kind in the Middle East, Spring of Culture that showcases art and cultural forms from around the world (bahrainedb.com, 2009). Nevertheless, the geographical spread of the Kingdom itself gives the opportunity to not miss out on any attraction in the state, but, it is an attribute that is being overlooked by destination managers.

b. Financial Hub and business friendly state

On comparing Bahrain's financial hub status to others within the GCC, Bahrain has by far been in the sector longest enough to be the key financial hub in the region, with the Central Bank of Bahrain holding a 40 year heritage as the trusted financier and regulator of the MENA region (BEDB Operating Review, 2008:15). In addition to the World Bank's bestowed status of ease in doing business at a rank of 20 out of 180 countries (Doing Business, 2010) the developing Bahrain Financial Harbour seeks to stand apart in infrastructure catering to the important financial sector in the Kingdom, an initiative well recognised and developed through public and private sector participation and encouragement. Moreover the very aim of the economic authorities to promote the Bahraini image as a business friendly one shows the openness to and the attempts to welcome foreign direct investments into the nation which would also benefit the Kingdom's people and their standard of living. Bahrain's lesser restrictive trade measures and business pressures compared to the other GCC economies is proving to be an example in the Middle East with economies like Oman and Saudi Arabia widening doors to foreign investments. This is also advantageous to tourism such that, the nation's international carrier Gulf Air can improve services to business dominated regions around the world and maintain travel friendly ties with nations like Singapore, the US and the UK which would indirectly enhance business trips to the Kingdom. With a business advantage at hand and with a thriving national carrier, the opportunity is yet to be seized completely. The implementation of a new e-visa service in early 2009 which also caters to issuing visas within 72 hours is an added service to facilitate business arrivals from companies over the world.

b. Environmental wealth

Though Bahrain may not be a haven of natural resources flourishing in the country in the form of wildlife, flora or fauna as Oman's Dhofar region or Saudi Arabia's well known bird watching zones, Bahrain is home to some of the region's fascinating endangered and unique species. The 8 sq.km Al-Areen Wildlife Park, a natural reserve accommodates the rare and the virtually extinct Arabian Oryx, Persian Gazelle, Springbok and the Impala. The Camel Farm in Janabiya is yet another place of visit which is home to over 500 camels in the region. Also unique is the Hawar Island's bird watching paradise which is a meeting ground for few of the world's most exotic migratory birds and sea birds. Furthermore, a trip to the Hawar Resorts at the islands also enables the tourist with an opportunity to experience the Kingdom's sea's diverse marine habitat and coral reefs (Bahrain Experience It, Algosaibi Travel, 2008). The Al Dar islands together with the Hawar Islands are considered natural environment preserves. This environmental sector is however neglected by the authorities in the Kingdom to maintain and sustain though it is unfair to ignore the actions taken to preserve the rare species in their natural environments. In light of tourism, it is less encouraged product segment which could significantly add to revenues while sustaining these properties.

c. Knowledge Resources and Human Resource

The 'Assessing Competitiveness in the Arab World: Strategies for Sustaining the Growth Momentum' report 2007 by the World Economic Fund states the improvement of the education sector in the Kingdom which implies Bahrain as the best-performing country in the Middle East and hence within the GCC regarding primary education. Also, the report affirms Bahrain's status as the regions highest literacy rate state having progressed in enrolling students into secondary and higher secondary education. The Kingdom stands advantageous at the fact that this marks the opportunity for governments to propose support towards careers in the tourism industry from an early stage. This could be initiated by introducing tourism studies in the curriculum or by emphasising importance of the service industry when in higher secondary. The Gulf Hospitality and Tourism Educational Company (GHTEC) and the Bahrain Institute of Hospitality and Retail (BIHR) are two important institutes in the Kingdom catering to the human resource tourism needs, the former being the Middle East's largest private sector provider of education in hospitality, tourism and retail furthering recognising the necessity to enhance human resource in the tourism field of the country.

d. Tourism infrastructure

Bahrain's one and only airport, the Bahrain International Airport (BIA), is one that is strategically located such that it lies between Iran and Saudi Arabia and provides the widest range and highest frequency of regional services connecting at ease international destinations in Europe, Asia, Africa, the Far East and Australasia. Bahrain Airport Company's CEO Dr Osama Al-Ali revealed earlier this year the expansion of BIA enabling it to accommodate 28 million passengers by 2038 from the current 7-9 million passengers being (bahrainairport.com, 2009). Leading aviation research firm Skytrax revealed in a survey conducted between August 2007 and May 2008 among passengers from 97 countries, that BIA was considered as the second best airport in the Middle East after Israel's Tel Aviv Airport and preceding the Dubai International Airport (bahrainairport.com, 2009). The airport's Duty Free is also an award winning travel retailer since its inception in 1990. Moreover, goods are of great quality and value as they are of most cost-effective duty free prices in the region. Considering land transport, Bahrain has been immensely benefitting from visitor traffic through the King Fahad Causeway that links it to Saudi Arabia. Regional travellers being of highest figures, the causeway is a convenient mode of land transport. The up-coming Bahrain-Qatar Friendship Bridge which is due to start construction in 2010 (bahrainona.com, 2009) poses as a new potential to enhance tourism and tourist arrivals to the Kingdom.

Competitive advantages

a. Formula 1, making Bahrain the home to motor sporting in the Gulf

The Formula 1 Grand Prix racing was doubtlessly an eye opener not only to tourists or visitors to learn about Bahrain's offering as a tourism destination but also to planners within the Kingdom to have understood further tourism development and further diversification of tourism as an important economic contributor. The Bahrain International Circuit (BIC) with its state-of-art facilities for the race and to other sporting needs for the rest of the year also provides as venue for corporate events that could accommodate from 10 to 10, 000 delegates (bahraingo.com, 2009). Qatar's race to be crowned the sporting capital of the Middle East is fierce after having hosted the Asian Games in 2006 and hosts of the Qatar Tennis Open every year that attracts regional visitors especially on an annual basis. Also, Abu Dhabi poses direct competition for Bahrain this year on as the wind off and last venue of the Grand Prix this year will take place in the month of November. Bahrain stands the chance to be robbed off regional visitors from the UAE and other neighbouring states in its Formula 1 game, however with various other opportunities in international sport coming in favour of Bahrain, with the success of staging one of the most popular sport events in the world, is never to cease.

b. Business and MICE tourism facilities

Business and MICE tourism is a segment is that greatly sought by GCC tourism. Bahrain's International Travel Expo has been a growing success year after year. BITE that takes place in the Bahrain Exhibition and Convention Centre, seeks to make BIC's exhibition facilities its next venue adding to the space and facilities for more number of exhibitors into the Kingdom (gulf-daily-news.com, 2009). Bahrain has ambitious plans to stabilise and maintain its business friendly outlook towards welcoming foreign trade. Adjoining the BIC, the project '@bahrain' is expected to take off which will add to the existing MICE facilities and will be the region's first multi-purpose event centre. The project will include an array of accommodation choices as well as leisure/retail facilities and a research institute that would focus on education and training. The design partner of the project emphasises towards creating Bahrain as one that provides year-round entertainment and is capable of hosting exciting events in the region (gulf-daily-news.com, 2009). Apart from these, global accommodation operators like Starwood Hotels and Resorts and Hilton Hotels Corporation continue to expand into the GCC with Bahrain inheriting promising market share which would enhance its role in provision of apt business and MICE facilities (Euromonitor, 2009).

c. Cruise Tourism

Euromonitor (2009) states the growing popularity of the Middle East as a cruising hub. The cruise industry in the Middle East was born in Dubai in 2001 with the opening of the Dubai Cruise Terminal which is the leading cruise hub in the region. However Bahrain's Ministry of Culture and Information's Tourism Marketing and Promotion Project Chief Executive Mohammed Nass stated in a press release in 2008 the similarity of Bahrain's tourism industry benefitting through cruise tourism just as Dubai does every year. Mr Mohammed Nass also hopes to observe an interest rise in Bahrain Arabian culture and heritage as the demand of shopping in Dubai maybe high comparatively (bahraingateway.org, 2008). Bahrain saw over 100,000 visitors by cruise between the months of May and October in 2008 reported another senior specialist of the Ministry (tradearabia.com, 2009). Currently three cruise ships dock every week at the Kingdom. He continued that Bahrain looks to increase tourism arrivals to 120,000 cruise visitor arrivals by 2010 with the government having set to provide for retail outlets and improvisation of facilities at the Mina Sulman Port which would also be ready to welcome larger cruise vessels. However recognising the potential of cruising in the Middle East, the government is determined to enhance the existing facilities and further introduce necessary additions to stand unique in the cruise experience which is a developing trend in the neighbouring GCC states as well.

d. Island Tourism

Bahrain is the only island Kingdom among the GCC states. It therefore stands advantageous due to its island proximity which are all conveniently situated, the climatic advantage as it is surrounded by seas and the shallowness of seas surrounding it which provides opportunities for further island development around the Kingdom. Realising the need for development the Kingdom seeks to expand spatially and geographically having given the green signal for a number of island projects which cater to different needs. Such projects would in future provide for a better standard of living of the nationals in the country by availing employment in the various sectors catered to within these projects as well as meet the growing development patterns of the global economy. As construction of these projects take shape, the maintenance and utilisation of infrastructure provided could also be taken care of by the tourism sector. Island projects are however rising with one Middle Eastern state or the other inaugurating plans or projects of an up-coming island development. Bahrain proves advantageous by adding to its existing natural 33 islands geographical image and promoting and marketing itself as a unique and truly Arabian island destination.

The role of the micro and macro environments will be discussed in effect with variables being studied according to relevance as they comprise the stakeholders that contribute to the competitive variables.

Core resources and attractors

This category comprises of seven main variables as devised by Ritchie and Crouch (2003) in their competitiveness model. They are physiography and climate, culture and history, mix of activities, special events, entertainment, superstructure and market ties.

A tourist destination's success depends on its attractiveness characteristics which makes not only the destination unique but the area it belongs to (Cracolici and Nijkamp, 2009). They add that a tourist destination should play the role as a supplier of spatial tourist attractiveness such that it producer destination that manages its resources well enough to please tourists.

Bahrain as an attractive competitor to the GCC region is one that demands an in-depth analysis. In terms of the attributes stated by Ritchie and Crouch, Bahrain stands a competitive advantage with its climatic conditions being surrounded by seas, is rich in Arabian culture and heritage though it has to be brought forth and encouraged in a larger scale. The same is the concern with other attribute; the opportunity is yet to be seized completely so that the tourism industry succeeds as a diverse one. Nevertheless as discussed earlier as a comparative advantage it is only commendable of efforts taken by the authorities to throw light on the cultural aspect of the nation. Also, the Formula 1 races have been a clear competitive advantage which will begin to face the test of time with the race to be held at Abu Dhabi coming November. The Kingdom is yet to diversify and open doors as a platform and venue to world famous concerts, entertainment programmes or even sporting platforms which would challenge the country's event management skills and compete against UAE and Qatar for a share in the market. As Day and Wesley (1988) state the sustainability of a positional advantage requires that a goal committed to sets barriers in way that makes imitation difficult for a competitor. Bahrain is in a position to take initiative based on this statement as it is fund secure and considered a liberal tourist state by visitors.

Supporting Factors and Resources

A drawback of this competitive model is that the authors do not create a link of the supporting factors and resources to the other stages of factors that account to competitiveness of a destination's tourism. Variables like infrastructure, accessibility and other facilitating resources form part of this stage in the model. It is of major concern and an important contributor to tourism success in a region. With personal experience as a tourist, these supporting resources and factors are key in the decision making process of visiting a destination when analysed from a visitor perspective.

Bahrain is a visitor's haven when considering these aspects of visiting a destination. Dwyer and Kim (2003) quote private and public-sector organisations that support tourism activities possess a collection of specific skills that are not easily imitable by competitors thus proving to be of competitive advantage over other states. Such skills also refer to hospitality in the region, the quality of service delivered, the attitude towards welcoming guests, infrastructural facilities such as airports, tourist information centres, travel retailers to name a few. To support the statement, Ahmed (2008) asserts productivity and quality are important as competitive advantage factors that would influence changes in the culture and operational methodology of a company (here a destination).

Accessibility into the region is an aspect that can be a major hindrance to tourism development of a destination. Though Bahrain initially was quite hesitant to open its doors beyond the Middle Eastern states, it is beginning to relax visa rules to enable visitors from a larger pool of international countries to visit the country. This is probably an area where Bahrain has been affected in the competition race as compared to Dubai or Saudi Arabia in the region. However it must be mentioned that though flexibility in visa applications have been made available largely for those travelling for business purposes to the region, in the course of time it can be expected of the authorities to remove restrictions easing access to the country for leisure purposes as well. Air accessibility through open sky policies are also gradually increasing tourism opportunities to the Kingdom (Euromonitor, 2009).

Destination Policy, Planning and Development

The role of policy and planning in tourism has been discussed with much importance in the literature review. Bahrain tourism is still awaiting a structured and planned approach towards maintaining a sustainable and competent stand. It is doubtless that the industry is supported by various stakeholders in the economy however a sole body does not hold authority over tourism in the state but it forms part of the Ministry of Culture and Information. The threat here is that tourism industry will not be recognised for its efforts to contributing to the economy and developments in the course of time will be sidelined which will also affect the quality of service to customers and hence tourism as a whole.

In contrast, Oman's tourism industry is relatively a new one, having been promoted as a twin destination along with Dubai packages initially. However the tourism industry's recognition in the region is seeing much economic transformation as well as intervention from the government and private sector authorities. The Oman Ministry of Tourism, Oman Brand Management Unit, National Hospitality Institute, OMRAN are a few dedicated authorities to contribute to Oman tourism's status. The development of Oman as a tourism industry is forecast by Euromonitor (2009) to benefit to a great extent which will see a growth rate in visitor numbers by 26.3% by 2013 which would be the result of efforts taken collaboratively in the Sultanate.

Nevertheless, Bahrain's current efforts to improve human resource skills in the sector are highly commendable. As Al-Alawi (2005) states *'employees are considered an important input for the production of goods and delivery of services and understanding what motivates employees and how they were previously motivated plays an important role in gaining competitive advantage'*. This is an important contribution to competitiveness as it also caters to the attribute of hospitality which is important to expect repeat visits to a destination. Moreover investments into the tourism sector are pouring in through initiatives that are funded by both public and private institutions (BEDB, 2009).

Alavi and Yasin (2000) formulate a systematic tourism policy plan for few Middle Eastern states and urges destinations to follow a strategic and systematic tourism policy pattern so that the economy will be benefitted and employment levels will be in favour of the economic situation. They indicate three approaches to policy making and action-plans to support each policy which cover the important points of preparing for growth suggesting a conducive approach towards tourism in the economy; promotion of tourism which also involves participation of the general public through surveys and opinion seeking, benchmarking of competitors and rightly targeted promotional strategies; and finally area wide joint-ventures to promote tourism, here an example being promoting of GCC tourism as a single package.

Bahrain's investments into the tourism sector strongly support the first approach suggested by Alavi and Yasin. The second approach is strongly connected to the destination marketing and management variable of the study which will be looked at further and so is the third approach. However the authors' study indicates a very simplified and more of a marketing approach that brings back discussion about the importance of destination management in a destination and the earlier trends of nearly equalising the role of destination marketing to that of destination management, the latter being the broader and most accepted approach.

Nevertheless any development plan formulated which seeks to prove beneficial for a destination ought to be evaluated and monitored during the process of implementation and after development. It ensures the competitiveness of the destination and enables the destination to adapt to changes and create a sustainable and secure environment.

Destination Management

Destination management is an immediate indicator of a destination's competitiveness. A few variables that Ritchie and Crouch's model state as indicators to evaluate destination management are organisation, marketing, human resource and finance management and visitor management (Ritchie and Crouch, 2003:63).

As mentioned Bahrain tourism industry is quite unstructured hence it lacks an organisational structure to look after all areas of tourism. However the marketing strategies implemented are quite commendable and follows the traditional approach of promotion at travel trade fairs. Apart from that a lot of marketing and promotional activities are being undertaken by intermediaries in the industry such as travel agents and tour operators. What the destination most importantly needs in this current competitive situation is a brand image to sum up what the country has to offer to visitors in the region. Dubai's 'Definitely Dubai' brand and Oman's 'The Essence of Arabia' (see Case Study Table 5.1) have a strong message about the destination's offerings that would lure or get a tourist thinking whether or not to travel to these destinations. Bahrain should be able to provide not only a brand that would appeal to audiences but also one that would promise what the Kingdom has to offer. This is very important to observe repeat visit. The country has been very successful by creating a Formula 1 image and by taking efforts to deliver the feeling of comfort through the slogan 'Where the heart is'. However this remains seasonal a campaign, one that is hyped as the country prepares to foray into the F1 season and one which dies after the race is over. It can be seen that Bahrain's marketing strategy mostly follows the direct marketing pattern however to create awareness it could gradually turn to other methods of promotions through newspapers, magazines, websites etc.

Human resource management has been considered in an earlier section of the project and has resulted in positive analysis of the workforce in the industry. The encouragement and involvement by the public and private sector institutions like that of the BEDB and Tamkeen are important contributions to the tourism industry's development. Skilled labour is a key requirement especially in a service industry where a lot of customer personnel interaction takes place. The general picture of human resource management in this context in the GCC region is quite discouraging as it is a well sought requirement in the developing context of tourism in the region and a necessity. Bahrain thus stands a chance of proving its human resource efficiency on sustaining and continuing the current trend.

Case Study : OMAN TOURISM AND MARKETING

BACKGROUND:

- The Sultanate of Oman has been banking on its tourism resources as the next economic alternative after it had forecast its oil and gas industry to give in on the state. However, efforts towards a complete image make-over and strong promotional techniques have proved successful luring great numbers of tourists to the region.
- A recent press release by Standard Chartered Bank indicated a 17.5% growth in tourism arrivals in the first five months of 2009 as compared to 2008. This also resulted in a revenue rise by 3.9%. The Omani tourism industry looks forward to a brighter second half of 2009 with the government spending 10% more into the industry
- The Oman Ministry of Tourism works closely with many other tourism related ministries, thus developing a sound network to provide the best of the Sultanate's products. Oman Air, Oman Brand Management Unit, National Hospitality Institute, OMRAN are a few dedicated authorities to contribute to Oman tourism's status

POSITIONING AND STRATEGY

- Oman's tourism industry (earlier a package with Dubai) is growing to position itself with a USP that showcases Oman’s true tourism potential but at the same time does not favour mass tourism. 'Priority Action Plan for Tourism' reveals the government's detailed master plan.
- The marketing programme which aims at the Sultanate's 5 main regions to indentify the brand 'Oman- the Essence of Arabia'. Oman concentrates in this initial stage at improving product offerings for the up-market segment in areas of sun, sea, and sand, eco-tourism, culture and heritage tourism and accommodation facilities.
- The Oman Travel Market has been catering completely as a marketing and promotions platform. Also, Oman has started deploying market based representatives in potential European countries to welcome more international tourists. Highlighting Oman's annual Salalah Tourism Festival 2009, Oman Air, launched road shows in Salalah and the fellow GCC states to encourage inbound tourism.

(Source: Travel and Tourism in the GCC: Global Briefing. Unpublished, Eurmonitor International, 2009)

Table 5.1 Case Study Oman Tourism

Qualifying and Amplifying Determinants

Crouch and Ritchie (1999) readdress the qualifying and amplifying determinants as ‘situational conditions’ and those whose affect matters greatly on a destination’s competitiveness as they may modify or moderate certain impacts from the previously discussed factors. They add that the destination's tourism industry may not be able to control or influence the impact of these factors.

The authors mentioned factors like location, interdependencies, safety and security and cost/value, however, further works by the same authors have led to the increase of variables such as destination image, carry capacity issues (Ritchie and Crouch, 2003). It can be argued that these are factors are viewed importantly by the destination in terms of competitiveness and from a tourist's point of view these variables add value to their visitor experience. Bahrain's location is no doubt a competitive advantage which is a hub for air transportation for example between the Indian-subcontinent of Asia and Europe. This point also leads to the matter of interdependencies; a strike in airlines flying to another continent via Bahrain would affect Bahrain's revenue sources at the airport or from sources the country receives as tourism receipts. In terms of safety and security, Bahrain has been able to maintain an image as a safe and secure Arab destination also considering the fact that its liberal environment has not been a threat to its local society and hence to tourists visiting the destination. Cost and value concerns are very much influenced by the macro-economic conditions of change in exchange rates and also has to do with inflation. Bahrain had amongst the Middle East the highest of inflation rates (Euromonitor, 2009) which has fortunately dropped down. Also the challenge with cost is the price competitiveness issue as Bahrain generally favours in the context. While most of the GCC states targets high end consumers and hence have higher rates of goods and services to offer, Bahrain's prices as a tourist destination is considered feasible and quality efficient.

Having observed Bahrain as a competitive destination through Ritchie and Crouch's (2003) framework there are few areas where tourism management in the region is faulty which shall be discussed in the forthcoming chapter where recommendations would also be made to overcome these aspects though they would be long-term commitments. In order to sustain a competitive advantage over other GCC states in the region, Bahrain has to pay heed to certain issues such as carrying capacity which would otherwise have irreversible impacts on the destination's tourism industry.

Following, a brief SWOT analysis of Bahrain's stand is done against the other 5 GCC states (which is also a summary of points discussed).

5.2 SWOT ANALYSIS

As Valentin (2001) quotes Ansoff (1965) and Porter (1991), a SWOT analysis seeks to understand the strengths, weaknesses, opportunities and threats as a traditional means of searching for ideas to realise a desired objective. With the help of a SWOT analysis, the researcher seeks to identify the areas in destination tourism where Bahrain is a consistent winner or gains off from a particular attribute in the economy, those features that need attention to overcome hurdles to development and those points that stand as a future threat or a bright opportunity, so that a brief make up of its competitiveness can be recognised as compared to its GCC counter-states. The following SWOT analysis table also proves as a summary of data analyses done.

STRENGTHS	WEAKNESSES
• Strategic location for easy access by air or land transport • Close proximity of attractions because of small geographical area • Liberal guest-host environment • Relatively cheap shopping as it is tax-free • Maintenance of Arab authentic and modern image • Climatic advantages throughout the year as surrounded by seas • Financially most secure in the region • Among the safest and threat free countries in the Middle East • Awareness of the destination as a sporting destination; the F1, importance of football, motor-sporting • Highest literacy rate state in the Middle East • Strong tourism infrastructure; transportation and accommodation	• Lack of a detailed and mapped-out tourism vision • Insufficient tourism awareness programmes locally • Lack of proper public private participation and cooperation • Lack of tourist information centres around the city • Lack of and little interest among local people to aid tourist-guide services • Seasonality of events to attract visitors • Lack of a separate brand identity for Bahrain as a tourism destination • Many projects catering to long term development, fewer events to benefit tourism in the short term • Involvement of trainees/employees in the decision process of the tourism industry • Non-updated tourist information websites *(contd..)*

OPPORTUNITIES	THREATS
• Revival of Gulf Air through complete public and private sector contribution • Funding of rigorous marketing techniques like road shows, television ads, and representation in larger target markets (eg. Europe) • Reviving culture and heritage, establish a USP through it • Cruise tourism; Competitive facility and resource development • Sports tourism beyond Formula 1 solely; football, athletics, weightlifting • Lesser restrictive visa applications to encourage tourists, nevertheless, enforce proper security checks • Events like the National Day (December) turned into a unique travel and must-see experience • Skilled and professional workforce	• Similar offerings regionally • Price competitiveness according to economic fluctuations • Carrying capacity issues being ignored in enthusiasm of projects • Similarity in up-coming tourism projects heading towards completion around the same time-line • Challenge to retain employees in the scenario of many job opportunities • Over-crowding of property • Challenge in brand creation as USP • Multiplicity of developments without a direction when developed without proper consultation and participation of stakeholders • Gradual rise in value of currency • Protection of image due to liberal environment

Table 5.2 SWOT Analysis of Bahrain Tourism- A Summary

CHAPTER 6 FINDINGS AND RECOMMENDATIONS

The context of this study has been to position Bahrain as a competitive international tourism destination in a region such as the Middle East which is a rising hot spot of tourism in the world. Among Bahrain's regional competitors the GCC states of Kuwait, Qatar, Oman, Saudi Arabia and the UAE are considered for analysis. Furthermore, needless to say with rising popularity the competitive spirit to gain the most out of the situation will be present among each individual state.

The initial analysis on reviewing data and inculcating it into the Ritchie and Crouch's model of destination competitiveness and sustainability provides the basis for measuring of Bahrain's competitive stand among the GCC states

- Resource availability as a core attractor

Bahrain's tourism industry is one where the lid already has been taken off, but the core product is yet to be explored. The number of opportunities and available facilities has left the stakeholders of the destination in a dilemma as to which strategy to use as a USP to position the state. The Kingdom is currently a business brand which also influences the tourism industry through the MICE segment. The over- ambitious plans of the existing authorities may result as prospects being in a hay-wire scenario.

Current Situation-

The absence of a tourism vision or a strategic tourism plan of action to realise potentials

The requirement of a stable and responsible authority to plan, formulate and implement plans those are developmental

Necessity to communicate roles and responsibilities to stakeholders in order to sustain enthusiasm in realising the plans that are suggested

Result on implementing change-

Creation of a focussed tourism strategy

Well-mapped segments to focus onto (development of short-term or long term strategies according to feasibility); opportunities being culture and heritage tourism, health/medical tourism

Clear and structured roles of stakeholders involved in the process who would develop their involvement and commitment through the process

- **Supporting factors and resources-a strong pillar**

Bahrain does not lack much in the supporting factors area of determining competitiveness. In fact on comparison to the states of Oman and Saudi Arabia it has implies a stronghold of competitive advantages over other states.

Current Situation-

Abundance of resources in the form of infrastructure- in accommodation, transportation facilities

Under-utilisation of resources in the form of improper training of human capital to create the best of service from facilities available

Large number of enterprises to support tourism but less or no initiative or innovative measures undertaken to contribute to tourism development in the country; 'move with the crowd attitude'

Result on implementing change-

Sustaining productive resources, deletion of non-contributing units to the industry or restructuring of enterprises to contribute to the industry

Grabbing of opportunities that lead to development and involvement of professional help in the development process

Encouragement through government support to initiate and innovate through programmes that would involve public participation and relationship building

- **Destination policy, planning and development- a major drawback**

Planning for tourism in Bahrain does not see much seriousness though having recognised the importance of the sector towards economic contribution. A fear seems to surface that development without proper planning would lead to carrying capacity issues with the destination on observing the number of upcoming projects and ongoing projects set to startle the Kingdom's overall view.

Current Situation-

Over enthusiasm in planning for tourism in the country, though in an unstructured manner

Developments in the country greatly influenced by developments around the region; the initiative to try a hand in something different does not rise

Tourism sustainability is out of focus- economic profitability and rise in tourist numbers is the aim

Result on implementing change-

Careful and wise consideration of projects; being competitive does not imply hosting a series of 'biggest' 'largest' 'first' if not one that stands apart of existing projects of land development

Considering natural resources of the country and spatial concerns analysis of positive and negative impacts to create a sustainable and environment friendly haven

Avoiding dangers of carrying capacity and stages of exhausting of resources that would lead to destination decline in the course of time

- **Destination Management**

A concern in Bahrain's competitiveness scenario following issues of destination policy and planning; a well planned and followed strategy will not give rise to many destination management issues and can be easily evaluated and monitored

Current Situation-

Destination managers have not been identified

Functions such as human resource development, finance management, marketing management are not combined towards a single strategy but perform differently

Perhaps a concept not rightly comprehended to or adhered to however followed less effectively

Results on implementing change-

Effective utilisation of resources- ability to benefit from research into core attractors and maintain quality of supporting factors

Collaborative and co-ordinated approaches to tourism development- involvement of labour in decision-making process, participation of local population in promoting destination

Creation of a destination management framework to highlight opportunities/ threats/ strengths/ weaknesses in managing a destination and identifying stakeholders

- **Qualifying and Amplifying determinants**

Though mentioned by authors Ritchie and Crouch that these determinants may be those that cannot influence the destination's capability, a few attributes can be forecast, predicted and managed successfully. Bahrain has met competitive advantages in this stage in the case of destination image, safety and security and cost or value.

Current Situation-

Image of tourist friendly destination as a comparatively liberal state in the Middle East as well as politically safe and secure

In price competition, a relatively feasible destination suiting to all customer segments and target markets

Carrying capacity is beginning to hit the tourism scenario with visitor arrivals rising year on

Result on implementing change-

Introduction of a brand image to formally stabilise tourist perceptions

Economic conditions are favourable to such destinations directly and create lesser opportunities to review price change

Current marketing approaches are considerably wise as direct marketing at trade fairs is the most utilised tool; target markets are to be chosen precisely

Having completed a detailed analysis of Bahrain's competitive stance among the GCC countries, the study seeks to be concluded in the following chapter.

CHAPTER 7 CONCLUSION

Bahrain faces a tough competitive scenario as a tourism destination especially among the GCC countries a major reason being similarity in product offerings and in macro-economic and micro-economic conditions such as that of the economic downturn.

However pertaining to tourism policy and planning and destination management attributes in the region the country has to undergo a number of changes to stand strong in the race, a point which has been stressed several times throughout the study. The GCC states of Oman and Qatar prove to be the strongest of competitor, nevertheless the initiative by the other emirates of the UAE to rise as tourism destinations cannot be ignored.

A major concern which has misled Bahrain tourism has been the lack of a definite idea as to the segment which could be best promoted as the face of tourism in the country. Business tourism was considered along with the fact that Bahrain is a business friendly region, not as an earnest attempt to position the Kingdom as a business tourism state. Similarly according to press releases by members of the tourism authorities, a number plans have been declared, which is a mistake, as stakeholders and the main objective of tourism development would ultimately dissolve into the chaotic situation.

Nevertheless such an approach can be considered given the situation of separate departments to cater to and pay heed to the growth of each tourism sector or tourist segment, but this cannot be foreseen in Bahrain's tourism industry in the near future due to the current approach being followed. In the meantime it is important that the Kingdom attends to sustaining its current advantages over other states by regular monitoring and evaluation of variables affecting the industry.

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