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1. GENERAL INTRODUCTION

1.1 Setting the Scene

Tourism is the world's most important and largest industry which regarded as one of the key sectors of national economies. It generates a major part of the national income as an important source of foreign currencies, necessary for local development. Tourism is also a major job generating industry characterized by its multiple effects on a number of other industries such as traditional and food industries, building infrastructure services such as hotels, restaurants, cafes, roads, airports and ports as well as other basic elements of tourism infrastructure. In fact, the main interest in international tourism started actually in the early sixties of the 20th century, especially in international organizations and constitutions. (The UN Conference on Travel and Tourism held in Russia in 1963 considered Tourism as an extremely desired human activity that deserves encouragement by people all over the world. The conference also urged all countries to give utmost and high priority to tourism industry through providing necessary technical assistance, due to its expected importance in consolidating economic development and earning hard currencies. Four years later, the United Nations declared 1967 as the International Year for Tourism.

International tourism has flourished in the recent years. The growth rate of international tourism reached 12 per cent per year. This rate outpaced the growth rate of world trade movement, and made tourism a key economic element in the economical and social development process in modern societies. (Nour El-Deen, 1997; Aldahlawy, 1987). In addition, Tourism has recently become more important in people's life after it was limited to the wealthy classes of societies. Accordingly, the number of tourists in the world has increased over the years from 14 million tourists in 1948 to 190 million in 1984 and rose to 340 million in 1986. In 1990, the number was 454.9 million and was 691 million in the year 2000 (WTO, 2000). Where international tourism revenues amounted to us \$ 118 billion as a direct income in 1985 apart from indirect income, and rose to us \$ 455 billion in 1999 as a direct income, which means that tourism was no longer a social luxury, but has become an essential economical factor in the enhancing the GDP of any country. And According to World Tourism Organization (WTO), the number of world tourists would be (1.006.4 billion in 2010 and 1.561.1 in 2020). The

revenues generated by tourism have grown at an average of (11.2 %) a year since the 1950s, easily outpacing the general world economic growth (WTO, 2000). This ever upward growth of tourism has come despite fears of international terrorism, wars, natural disasters such as tsunamis and earthquakes. Experts in the tourism industry expect the growth to continue at around (5%) for the foreseeable future. The WTO also affirmed that the growth rate of tourists' arrivals to the Middle East and Africa have done well between 2000 and 2005. For example, international tourist arrivals to Africa increased from 28 million to 40 million, this represents a growth of (5.6%) a year, beating the world average of (3.1 %). Over the same period, Africa's international tourism receipts more than doubled from (\$ 10 billion to \$ 21.3 billion). The WTO estimated that the growth rate of tourists' arrivals to the Middle East and Africa would grow between 5.5 % and 7.1 % from 1995 to 2020 (WTO Tourism Market Trends, 2007). This means that the continent of Africa plus the Middle East is still largely unexplored territory, where the potential for Africa as a whole therefore is immense. Libya for example, with its highly attractive location in the North African region, has a great opportunity (to come out of the cold) and be part of the international tourism business.

However, it is time now that the Libya should take its share in the international tourism receipts and activate its tourism marketing actions, especially as it possesses a huge and great attractive tourism sites, some are natural and some are man-made in modern and ancient history. What is needed now is that all authorities concerned should exert utmost efforts to develop a plan or a strategy for tourism marketing in Libya, taking into consideration all economic and social circumstances, as well as the possibility of getting advantage of all sources of tourism attractions it has got, according to the world recognized standards of marketing tools known world-wide.

1.2 Background to the Research Problem

The problem of the current research study, as seen by the researcher, is that despite the fact that the Libya possesses varied touristic natural resources which form the necessary raw material for the Libyan touristic product (such as remedial, ecological and desert tourism), and a huge cultural heritage which makes up a large part of tourism industry and which should bring up benefits and welfare for the people of Libya and

contribute to enhance the economic development process. In spite of this, Libya hasn't got its share of the worldwide receipts for international tourism, which, according to World Tourism Organization (WTO, 2000 Report), ranks first on top of other industries. This is evident in the obvious difference in the number of tourists visiting Libya and other neighbouring countries in the year 2005, whereby Each of Egypt, Tunisia and Morocco attracted over 5 million tourists, Libya attracted only 173,000 tourists. Table (1.1) shows the big difference between tourist numbers visiting Libya and neighbouring countries (WTO, 2007).

Table (1.1): Tourists Arrivals by thousands

Country \ Year	1990	1995	2000	2003	2004	2005
Egypt	2,411	2,871	5,116	5,746	7,795	8,244
Tunisia	3,204	4,120	5,058	5,114	5,998	6,378
Libya	96	56	174	142	149	173
Morocco	4,024	2,602	4,278	4,761	5,477	5,843

Source: (WTO's Tourism Market Trends -2006 Edition, 2007)

In the mean while, tourism revenues in the above-mentioned countries in the year 2005 ranged between \$ 2.1 billion in Tunisia, \$4.6 billion in Morocco, and \$ 6.8 billion in Egypt, while it was only \$ 164 million in Libya. Table (1.2) shows the big difference between Libya's revenues and other neighbouring countries (WTO, 2007).

Table (1.2): Tourism Revenues in US\$ Millions

Country \ Year	1990	1995	2000	2003	2004	2005
Egypt	1,100	2,684	4,345	4,584	6,125	6,851
Tunisia	948	1,530	1,682	1,582	1,970	2,124
Libya	6	2	75	205	218	164
Morocco	1,259	1,296	2,039	3,225	3,924	4,621

Source: (WTO's Tourism Market Trends -2006 Edition, 2007)

From the above discussed figures of tourism arrivals and revenues, we can learn that tourism marketing for developing countries including Libya is an important aspect in promoting and selling the tourist products. Thus enhance its competitive market share in the tourism industry within the North African or the Middle East region. But in fact a developing country like Libya usually suffers from a number of problems, the most

important of which is the difficulty in marketing the tourism product to the customer (tourist or traveller). This may be due to the lack of expertise and funds allocated for purpose of marketing, as well as inadequate distribution systems suitable for this purpose. However the research problem could be summarized as follows:

1. Lack of interest on the part of various tourism organizations (local tour operators and travel agencies) in Libya, to study (national and foreign) tourist needs, wants and demands which could identify precisely the desired types of tourism. Such study would help develop a new tourism marketing strategy, which would satisfy the desired needs of the both the tourist and the tourism market locally or internationally in changeable business environment.
2. Inability to target the most important and relevant tourism market sectors, which could be achieved only by devising suitable characteristics for the evaluation of areas of investment and tourism attractions and determine their targeting priorities before positioning an effective marketing strategy in Libya. .
3. Lack of an effective tourism development plan or strategy due to mis-direction of available physical and human resources. This could be due to the fact that people or officials working at the various tourism sectors are lacking marketing techniques or skills and are unaware of the importance of the use of the suitable marketing tools in order to effectively influence the tourism market and gain competitive edge in the region as a new tourism destination.

However, from the above discussion the main research question is formulated:

“Are the current tourism planning and marketing strategies in Libya efficient or effective to achieve sustainable tourism development locally and internationally?”

1.3 Research Aim & Objectives:

Tourism is considered one of the biggest industries in the world and is expected to be very important at least in view of capital invested and volume of manpower. Like other countries, Libya seeks to get into tourism industry since it is something inevitable and complementary to the economic development program, beside the benefits that may be earned from its share of the local, regional and international tourism market. As a

result, the Libyan government in the recent years has introduced tourism as an attractive developmental alternative to sustain the national economy beside the oil factor. This research will focus on the enhancement of the tourism industry in Libya, which might become the most promising sector in the near future. However, this in return may require a deep insight and a strategy that can envisage a good use of time, effort and money. This is exactly the main aim of the research which can be summed in the following research objectives:

- Implementing the modern concepts of marketing in the tourism sector, taking into account the conditions under which the concept is applied.
- Giving emphasis to the importance of using universal marketing tools and techniques. This can be done by adopting a new strategy for marketing the Libyan touristic product and the fulfilment of the strategic objectives of the tourism sector in order to help provide an alternative source of income and strengthen the Libyan economy and be the market leader.
- Presenting a true image of the actual situation of the Libyan tourism market showing how far travel and tourism organisations are prepared to conduct market researches and studies in order to adopt a successful strategy for marketing the Libyan touristic products and attract large numbers of tourists to the country as a new tourism destination.

1.4 Research Hypothesis:

- I. Developing a sound marketing strategy to promote the Libyan touristic product would enhance the effectiveness of the tourism activities carried out by both the public and private organisations working in the Libyan tourism sector.
- II. Ineffectiveness of tourism marketing activities carried out by both the public and private tourism organisations based on a will-designed marketing strategy approach could have a negative impact on the tourism sector in Libya.

1.5 Significance of the Research

Tourism has been a part of human life for a variety of purposes such as health, education, trade, leisure, recreation, and for social gathering. Improvement in travel

technology and high per capita disposable income, especially in the developed societies with increased interest to travel abroad, have led to enormous growth in international tourism (Busby, 1993). This proves that in developed countries, tourism has assisted diversification of the economy and helped to combat regional imbalance, while in developing countries such as (Tunisia, Morocco, and Egypt), it has provided an export and better job opportunity, with greater price flexibility, self determination than their traditional practices or expertise (Wearing and Nail, 1999).

Tourism is also an economical activity that gains great importance in countries that possess touristic and archaeological sites visited by individuals as tourists and those who are interested in tourism affairs and projects. Therefore the presence of purposeful strategies based on sound marketing standards represent the starting point in launching and the success of any tourism plan aimed at attracting tourists and revenues. Accordingly, not effort or activity whatsoever would succeed unless linked to suitable strategies especially in terms of marketing. Reliable planning for tourism marketing with all its elements is the true guarantee to ensure that tourism would succeed as a human activity on one hand and as an economical motivator on the other.

Adopting a new strategy for tourism marketing symbolizes an important step towards determining the markets which commodity and service corporations existing in continuously changing unpredictable environments are targeting. Such strategy should also be capable of meeting tourists' needs & desires. To ensure success to such strategy, sufficient and accurate data on all aspects of the entire market should be available to tourism marketing planner, through conducting field studies on tourism destinations in a country like Libya. This process aims at determining the features and value of each site separately and identifying the characteristics and nature of the users of the touristic market. The study derives its significance from two facts. First, this research focuses on the tourism industry which is one of the fastest growing and largest in the world. Second, this research concentrates on the marketing function, and its modern techniques, and the various marketing strategies, tools and techniques.

1.6 Research Contribution

Contribution of the research has been described previously as “the evaluation of important of the thesis to development of the discipline” (Philips and Pugh 2000). Whetten (1989) associates a theoretical contribution to consist of the following attributes: (1) Significant, new, value added contribution to current thinking addition to the filed of research. (2) Will the theory change the area of research in some way or the other? (3) Is the underlying logic and supporting evidence required and is the assumptions explicit? (4) Does the research reflect clear thinking and is the multiple thinking (What-How-Why-When-Who) covered? (5) Is the thesis written well with all the thoughts flowing logically? (6) Is the topic of interest to other research and will it advance current thesis? (7) Is the research of interest to others and can the obtained results be generalised further? Where the research presented in this thesis makes a number of contributions to knowledge about the subject of tourism planning and tourism marketing with special consideration to Libya as the main case study.

However, the following main research contributions have been realised:

1. This research contributes towards a process theory of the tourism sector in Libya within two aspects (the tourism potential and the problems), which will help policy makers at national and regional levels to improve Libya’s tourism developments.
2. Providing useful information to all parties interested in the tourism markets worldwide (tour operators, travel agencies, etc) regarding the country’s tourism attractions, resources, price levels, image, degree of satisfaction and expectations about Libya as a new tourism destination and the international tourists’ needs and desires.
3. The research considered to be one of the few studies carried out in the North African region which deals with aspects of developing strategy or framework for marketing the Libyan touristic product and its impact of the effectiveness & efficiency of the Libyan tourism sector at large. This in return would help to improve tourism assets for future generations and formulate an appropriate tourism plans in Libya
4. The observation of tourism marketing issues or problems will assist the Libyan tourism administrators working at both the private and public sector to improve the

effectiveness of their marketing activities and promotions in the light of new strategic frameworks proposed in the this research study (see chapter seven for more details). In addition, if these frameworks are implemented by the GBT or other tourism authorities, it could contribute to the economic and social developments in Libya.

1.7 Research procedures & Framework

The current research study's procedures comprise devising a questionnaire survey forms of which have been distributed among random sample representing the study's main society that were based on exactly (282) international tourists visiting the country from many entry points . The researcher then conducted (face-to-face) personal interviews with a number of representatives or administrators working at both the general or regional tourism boards, in order to obtain data and information needed to answer the research question, test its hypothesis and achieve its objectives.

However, the study's framework is outlined in the following:

1. The location framework:

These comprise a number of public tourism boards working within the Libyan tourism sector national wide and which are authorized by the Libyan General Board of Tourism (GBT) as a sample for conducting the research study.

2. The human framework:

This comprises distribution of questionnaires among random sample of international tourists visiting the country through its sea, land and airport borders, seeking their opinion about different aspects of tourism planning and marketing in Libya, besides conducting personal interviews with key administrators representing the General Board of Tourism and some Provincial Tourism Boards (PTBs).

3. The time framework:

Due to the limited time-frame and shortage of financial resources, the researcher has chosen to gather imperial and secondary data up to the year 2005.

1.8 Research Structure & Layout

This research on tourism marketing in Libya is structured into seven chapters in order to achieve its main aim and objectives (see figure 1.1) as follows:

The first chapter has set the scene and outlined the scope of the research problem to be addressed during the course of the current study on tourism marketing in Libya. It also develops the research hypothesis within the frame of well-studied research aim & objectives. The significance of the research, study procedure and framework, and the research contribution to knowledge has been also highlighted in this part.

Chapter two then discussed the economic and social impact of tourism developments in some countries including Libya. Looking closely on the country's over-dependence on oil as the main income generator which resulted in some implications such as, neglecting other sectors in the economy including tourism. These implications will be studied and the importance of economic diversification will be discussed. Finally the underestimation of the potential of tourism sector contribution to Gross Development Product (GDP) among some tourism destinations including Libya will be addressed and solutions for this matter will be provided.

Chapter three will study the main issues and aspects surrounding tourism marketing, which assesses the researcher to set up the factors that have a particular influence on the decision making process to the tourists or tourism customers when chose to travel to any tourism destination locally or internationally. As result, in-depth analysis into international tourists' behaviour, motivation to travel, attitudes and images towards particular destinations, will be done depending on secondary data gathered from the literature on tourism marketing and marketing research practises, and applied techniques. In addition, the researcher will introduce the four principle variables, which represent the main elements of the marketing mix (Product, Price, Place, and Promotion). In the context of these variables, tourism marketers have to make continuous decisions in their efforts to manage tourists' demands and desires efficiently. These four core elements of the marketing mix should enhance the decisions of plans concerning the tourism product for sale in two major contexts, which are; (the tourism environment and long term strategic marketing objectives).

Chapter four presents the research design & methodology rather than the analysis of the findings that will be discussed in chapter five. However, this chapter explains the strategic research philosophy adopted, questionnaire survey used and personal interview methods applied. It also discusses the research sample frame for both parts of the study and discusses the concerns in the procedure. It also outlines the main data analysis techniques that been approached to test the research hypothesises.

Chapter five presents a detailed analysis of the results obtained from both parts of the study (questionnaire survey and personal interviews). The objective of this chapter is to answer the main research question and test the validity of the research hypothesises, which were put forward in the first chapter of this PhD thesis. However, part one's analysis focused on the international tourists' questionnaire survey in order to find out their attitudes, perceived image, degree of satisfaction, etc towards the country's touristic products and provided tourism services or facilities. Where, part two's analysis focused on seeking the opinion of key tourism administrators in Libya in order to achieve two main objectives. First, to find out to what extent, tourism is important to the country's national economy and social developments. Second, to examine the level of tourism planning and current status of marketing and promotional activities applied within the tourism sector in Libya.

Chapter six represents the research findings in more details and interpret the information obtained from chapter five in terms of developing a new approach to tourism planning of which, will be used to design a sound tourism marketing strategy. These strategies then would be combined in order to enable the researcher to purpose a strategic tourism framework for the improvement of the tourism sector in Libya.

Finally, chapter seven concludes by offering some policy recommendations for all concerned tourism authorities and interested parties working in the tourism sector (local tour operators, hotels, travel agencies, etc), to succeed in promoting the Libyan touristic products efficiently and effectively. Moreover, the research limitations and suggestions for further tourism research studies to be carried out will be addressed.

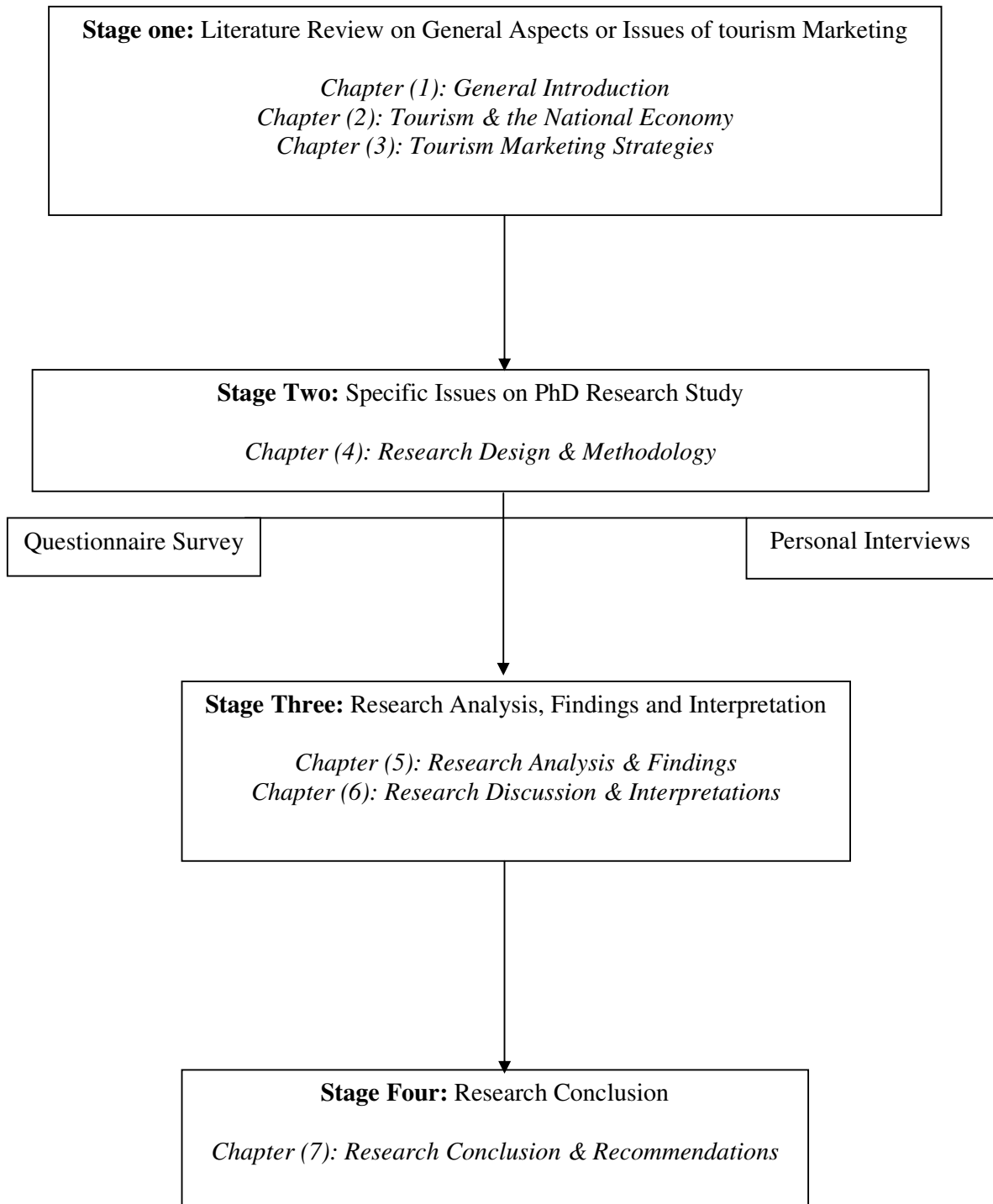


Figure (1.1): The Research Structure

2. TOURISM & THE NATIONAL ECONOMY

2.1 Introduction

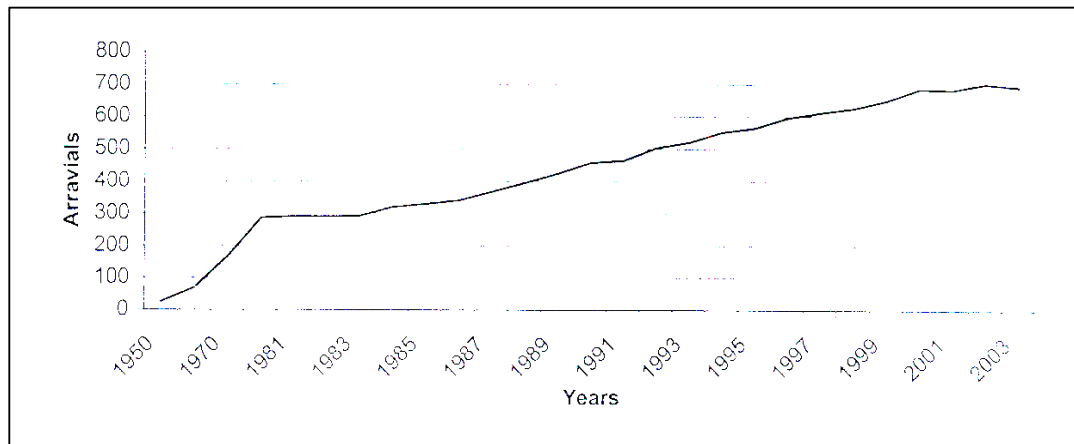
The aim of this chapter is to analyze the effects of tourism development on sustaining the national economy and social development in some countries including Libya. It highlights the social & economic effects of tourism developments in general and on the Libyan economy. The country's over-dependence on the oil factor resulted in some shortcomings such as neglecting other sectors in the economy including tourism. These shortcomings will be discussed and the importance of economic diversification will be addressed. Finally, the underestimation of the potential of the tourism sector contribution to Gross Domestic Product (GDP) among various tourist destinations including Libya will be addressed and solutions for this matter will be discussed.

2.2 The Importance of Tourism

Since the beginning of civilization, travel has been a feature of all society. According to the WTO (World Tourism Organisation, 2002), it has been estimated that there were 25 million tourist arrivals globally in 1950 and this has risen to 693 million by 2001. Also, receipts from tourism have grown even more rapidly from less than \$2 billion to \$463 billion over the same period. It states that tourism is the world's largest growth industry with no signs of slowing down in the twenty-first century. According to WTO (2002), the study of tourism 2020 vision, forecasts that: "International arrivals will reach one billion by 2010, and 1.6 billion by 2020. Moreover, by 2010, the tourism economy contribution is estimated to grow to 12 per cent of global GDP, and it will support 250 million jobs, (9 percent of total employment worldwide)". By 2020, some 328 million people around the global will be employed in travel and tourism related jobs because of increased demand (WTO, 2002). This impact will increase by 46% over the next decade. Among the OECD (Organisation for Economic Co-operation and Development) Nations, which accounted for more than 70% of the travel related industries? The most significant employment producers are the US with 13.4 million jobs, Japan with 6.1 million, and Germany with 3.6 million. In addition, travel and tourism is accounting for, at present, more than 10 percent of employment, globally, regionally and nationally (Goeldner et al, 2000). Apart from the fact that there is fairly detailed information on tourists' arrivals and their

estimated expenditure, there is a lack of information on the contribution of the tourism sector to output, employment and income. These shortcomings characterize tourism information and statistics in both developed and developing countries alike.

Figure (2.1) shows international tourist arrivals all over the world up to 2003 and the strong rates of growth for the last several decades. However, growth in international tourist arrivals slowed to (2.4 percent in 1989) and 3 percent in 1997 due primarily to the Asian financial crisis. Also, international arrivals went down from 697 million in 2000 to 693 million in 2001 showing 0.6% fall compared to 2000, due to the weakening economies of major tourism generating markets and September 11th impacts on the USA and rest of the world (WTO,2002).



Source: (WTO, 2005)

Figure (2.1): International Tourist Arrivals (1950-2003)

Although international tourist arrivals have increased in all regions, some have performed better than others have. In 1989, the top five European countries France, Spain, Italy, Austria and the UK, took almost 149 million or some 55 per cent of all European arrivals (WTO 1991). In 2004, world tourist arrivals were much greater than in 2003. The Iraq war and SARS were major reasons for the fall in 2003. However, just before the end of 2004 the world was shocked by the sad news and images of seaquake and the ensuing tsunami in the Indian Ocean (WTO, 2005).

To conclude, tourism has been realized in many countries and regions to be a major source of job creation, income and foreign currency generation and therefore has become

a dominant sector. In addition, tourism clearly counts as a remarkable economic and social phenomenon of the last century, and the development of the industry is expected to become even more important in the 21st century especially with new tourist destinations being opened up worldwide as the case in some South American, African, and European Areas, of which will be discussed in the next section.

2.3 Economic & Social Effect of Tourism Developments

Tourism, as Elliott (1997) explained, is one of the fastest growing industries in the world. It has been observed that for many countries, tourism represents a significant potential for future development, while for others it offers a diversification of national economies. In addition, people at all levels and occupations in society are affected in one way or another by this fast growing and important industry. The European Union (1998: Sec. 74), argued that:

"The importance of tourism in a region's development is due in particular to its job-creating capacity, to its contribution to the diversification of economic regional activities and to various indirect effects of expenditure by tourists".

However, the effects of tourism on sustaining the national economy and social developments in some tourist destinations in different parts of the world can be acknowledged as the following:

- **The Case of Cyprus**

Cyprus as a developing country has become as an important destination especially for European tourism since independence in 1960. Tourism had begun to make an important contribution and foreign exchange receipts increased from £717 million (9.4 percent of GDP) in 1980 to £813 in 1995 (£1.00 = £1.17752). In addition, in 1996, around 29,800 people were employed in hotels and restaurants amounting to 10.6 percent of total employment in the Country (See Table 2.1). Table (2.1) also indicates that tourist receipts were just 9 percent of GDP in 1980 and peaked at almost 24 percent in 1992, and they have since fallen back to 19 percent in 1996. The rising share of the tourism sector in GDP, up from less than 4 percent in 1980 to almost 9 percent in 1996, indicates the direct contribution of tourism to the expansion of economic activity (Ayles, 2000).

Table (2.1): Principal Indicators of Tourism in Cyprus

Year	Number Of Tourism (000s)	Foreign Exchange Receipts (CY £M)	Foreign Exchange as a Percentage of GDP	Contribution Of Tourism to GDP (%)	Employment in Restaurants & Hotels	Employment in Tourism Sector as a Percentage of Total Country Employment
1980	349	71.7	9.4	3.6	9.420	5.0
1981	424	102.4	11.7	4.4	11.110	5.7
1982	531	138.7	13.5	5.0	12.420	6.3
1983	600	174.8	15.4	5.8	13.680	6.8
1984	666	212.0	15.9	6.3	15.120	7.2
1985	770	232.0	15.7	7.0	16.630	7.6
1986	828	256.0	16.0	7.6	17.250	7.8
1987	949	320.0	18.0	8.5	18.050	8.0
1988	1.112	386.0	19.4	9.3	20.780	8.7
1989	1.379	490.0	21.7	10.3	22.840	9.3
1990	1.561	573.0	23.4	10.6	24.300	9.7
1991	1.385	476.0	18.4	8.6	23.600	9.2
1992	1.991	694.0	23.8	10.2	27.600	10.4
1993	1.841	698.0	1.4	9.1	27.870	10.4
1994	2.068	812.0	22.3	9.4	29.000	10.7
1995	2.100	813.0	20.5	9.1	30.100	10.7
1996	1.950	780.0	19.0	8.6	29.800	10.6

Source: Tourism and Migration Statistics (Ayres, 2000)

In 2002 some 2,418,200 foreign tourists visited the Greek Cypriot area and receipts from tourism amounted to CY£1,200 million. On the other hand according to the provisional figures, 425,556 tourists visited Turkish Cypriot area in the same year where in 2003 revenue from tourism amounted to an estimated \$117.1 million US Dollar (The Europa World Year Book, 2004). The expansion in tourist arrivals was facilitated by a parallel rise in the construction of new hotels, apartments and other tourist accommodation located almost exclusively in the coastal regions.

Air transportation, airport, and related services have profited directly from the growth of tourism. Furthermore, agriculture and manufacturing also benefited from the increasing number of arrivals who boosted the demand for a wide range of locally produced products. Because of tourism, fish-breeding industries have been established in the island

and there are other instances of local products, particularly wines, food, and handicrafts that have been revived by the demand generated by tourists. Many of the new jobs created in banking, finance and related services, construction and real estate development and travel services provided by many local companies were directly or indirectly related to tourism sector and its main income generator (Butler, 1993).

Moreover, tourism has been an important source of foreign exchange, which has eased the external borrowing requirements and thereby released domestic resources for investment in other sectors. The dominant position of tourism as a source of foreign exchange in the case of Cyprus is compounded by the heavy dependence on the UK market. In 1994, arrivals from the UK accounted for almost half of all tourist arrivals. Even more important than this, is the contribution that tourist receipts have made to the balance of payments. Employment increased from less than 10,000 in 1980 to almost 30,000 in 1996 and at the same time, the proportion of the work force employed in restaurants and hotels rose from 5 percent to over 10 percent. Between 1980 and 1992, for every 100 jobs created in the economy, 24 of them were in restaurants and hotels. During the period 1989 to 1992, a large number of Cypriot expatriates returned encouraged by the expanding economic opportunities and particularly the growth of the tourist sector (Ayres, 2000).

According to the Central Bank of Cyprus (Cyprus Economy, 2005), the Cyprus economy recorded GDP growth of 4.1 %, in the period 1995 - 2001, compared with an average growth rate of 3.5% in the European Union (EU)'s member countries during that time and 2.4% in the Euro area. Moreover, Cyprus's GDP per capita has reached 88% of the corresponding Euro area average, while average GDP per capita in the EU member countries does not exceed 40% of the euro area average. The service sectors play an important role in the Cyprus economy. The big success for the economy is accomplished by tourism related services such as, hotels and restaurants.

There is no doubt that the economy of Cyprus has made remarkable progress in the last 20 years. Cyprus is one of the top performing countries of the world in terms of economic growth; the standard of living compares favourably with many parts of Europe, and there is full employment and virtually no poverty. All of this related to the growth of tourism

sector in the last few years, which in return supported Cyprus to become full member of the EU since (1st of January 2004).

▪ **The Case of Brazil**

According to Santana (2000), although Brazil is not a tourism-dependent country, this activity represents one of the most important sectors for the Brazilian economy and its importance for the country's development is increasing year by year. For most South American countries, tourism represents unrealized developmental potential. In fact, in countries such as Brazil, Chile and Argentina, tourism has taken a new dimension in recent years, contributing significantly to those countries' balances of payments and providing millions of jobs. However, some limiting factors, such as the great distance from the most important generating markets and a lack of resources for investment in tourism infrastructure, have compromised growth and expansion.

Despite the fact that Brazil is the largest country in South America and has a wealth of cultural and ecological diversity, tourism has been largely overlooked by both policy makers and the private sector. Compared to 1996, the number of tourist arrivals in Brazil increased by 6.9 percent, to 2.8 million international tourist arrivals (WTO, 1999) and receipts for the same period improved by 5.1 percent (WTO, 1999a). As cited by Santana (2000), in 1998 Brazil experienced unexpectedly around 10 percent increase in the number of tourist arrivals and thus revenues (WTO, 1999).

In addition, according to Brazil's Tourism Institute, more than 4.8 million tourists visited Brazil in 1998, generating more than \$3.7 billion in tourism receipts. In terms of exports, tourism was second only to Soya, surpassing traditional export products such as iron and other minerals, coffee and sugar (Santana, 2000). In 2002, some 3.8 million tourists visited Brazil and receipts from tourism amounted to US\$ 3,120 million (The Europa World Year Book, 2004).

▪ **The Case of Egypt**

In Egypt, current account numbers show that tourism is becoming the most important Source of foreign currency, with a share of over 28 per cent of Egypt's major sources of foreign receipts. In 1998/99, tourism generated \$3.2 billion, which is equivalent to 29

percent of total service exports and 37 percent of non-factor service exports for the same year (Tohamy and Swinscoe, 2000)

The results of a foreign visitor expenditure survey conducted by the Egyptian Ministry of Tourism in 1996, shows that Egypt has been successful in diversifying its tourism product. Nearly 45 percent of survey respondents cited leisure as their prime reason for visiting Egypt followed by museums and antiquities with (34 %), business and commercial visits (9%) and visiting relatives (6 %). The results of the visitor expenditure survey show that tourism development had a significant impact on the economy in general. On average most nationalities spend roughly (30%) of their total expenditure on accommodation, food and drink in hotels. However, they also spend almost half of their total expenditure on things such as, entertainment and cultural (18%), shopping (18%), and on food and drink outside of hotels (11%) which feed directly on to the local economy. However, table (2.2) shows a rise in tourist arrivals in Egypt by (5.5%) and tourist receipts by (11.5 %) in 2006 compared with the previous year 2005 (The Egyptian Alahram Newspaper, 2007).

Table (2.2): International Tourist Arrivals and Receipts (Egypt) 2005-2006

Year	International Tourist Arrivals ('000)	International Tourist Receipts (US \$ million)
2005	8,600	6,500
2006	9,820	7,600

Source: Alahram Newspaper (Egypt, 2007)

2.4 Libya as a New Tourism Destination

Tourism as a recognized industry in the world is relatively recent and in Libya it is still to be developed. During the last few years, Libya has witnessed increasing development in the service sector in so far as the number and size of the companies are concerned. This has especially affected the tourism and hotel industries. Libya has opened its doors for tourism only recently. There has been a successful start to tourism programmes, which have given satisfactory results and recommendations. According to the Europa World Year Book (2002), the international tourist arrivals statistics of Libya

are not very accurate. Visitors from Arab and African countries who seek working in Libya distort these statistics. In fact, these travellers use tourism as their purpose of visit in order to gain entry to the country. Therefore, this should be taken into consideration, when studying international arrivals and receipts during the sanction period to 1999.

However, in 2006, the total international tourist arrivals were (125480), showing a huge increase compared to 2005 and 2004 according to data published by the Libyan General Board of Tourism on their Internet Web Site and prepared by (The Information and Statistics Department. 2007).

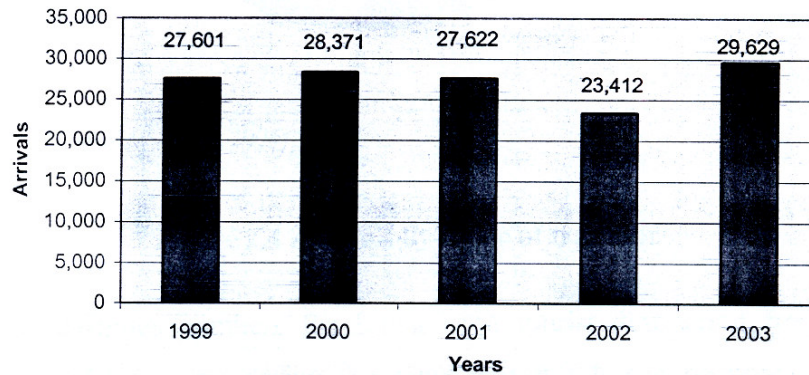
Table (2.3): International Tourist Arrivals and Receipts (Libya) 2004-2006

Year	International Tourist Arrivals	International Tourist Receipts (US \$ Million)
2004	42638	2,387
2005	81319	4, 553
2006	125480	2,998

Source: The Libyan General Board of Tourism (2007)

Furthermore, in relation to information summarized from the (WTO, 2004), the statistics include arrivals of non-resident visitors from various countries worldwide. From the data, international tourist arrivals from top-generating tourist markets during 1999-2003 are shown in (Figure 2.3). These data show international visitors who really travelled to Libya for tourism purposes or reasons and does not include, those who visit the country for seeking work or business.

Figure (2.2) indicates that tourist arrivals from those markets increased from 27,601 in 1999 to 32,374 in 2003. On the other hand tourist arrivals went down from 27,622 in 2001 to 23,412 in 2002 due to September 11th impacts, which affected international tourist arrivals all over the world. In addition international tourist arrivals witnessed a slight decrease in 2001 compared to 2000, which might be due to the weakening economies of major tourism generating markets.



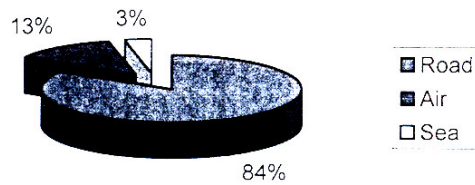
Source: (WTO, 2004)

Figure (2.2): International Tourist Arrivals from Top Generating Tourism Markets to Libya

Passenger transportation is a significant component of the tourism system. It provides the critical linkage between market source and destination. Therefore, in the planning for tourism development, it becomes necessary to consider all planning modes for passengers-movement throughout the circuit in order to reduce its friction as much as possible (Gunn, 2002).

The UN international embargo, which has been a main deterrent for tourists, resulted in delay in tourism development. The majority of international tourists had to travel along an arduous, physically exhausting road into and out of the country through the Tunisian-Libyan border or the Egyptian –Libyan border, also through the Sea in ships or ferries between Libya and Malta.

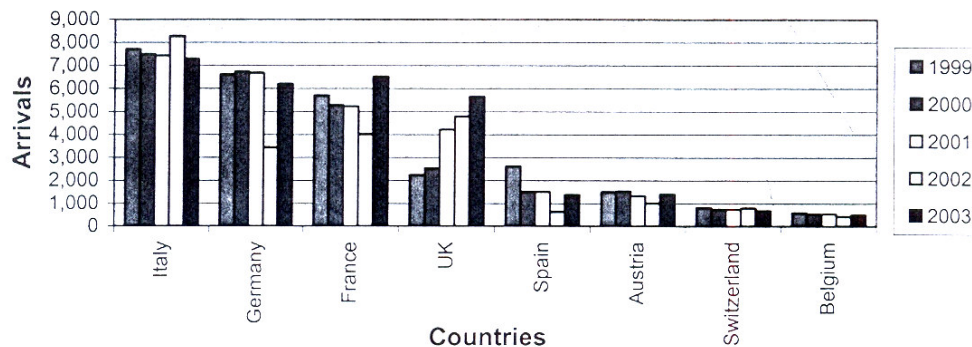
Figure (2.3) illustrates the mode of transport, which had been used by international tourists during the last ten years. It can be seen that (84%) of international tourists came to visit Libya through the Tunisia-Libya land border, while only 13% and 3% came by air and sea respectively (GBT, 2004).



Source: (GBT, 2004)

Figure (2.3): Arrivals by Mode of Transport

Figure (2.4) meanwhile illustrates numbers for Libya as a tourist destination from the top or the best generating tourist markets during the same period. It can be noted that most international tourists visiting Libya come from Italy, Germany, France and the UK respectively. A small number of international arrivals represent other countries (such as Spain, Sweden, Switzerland, etc) .The Libyan tourism authority is trying and working hard to boost the number of tourists generated from these markets and aiming to target new tourist markets from various countries around the world.



Source: (WTO, 2004)

Figure (2.4): Libya's Visitor Numbers from the Top Generating Tourist Markets (1999-2003)

However, with reference to all the information given above we can see that Libya has many tourism potentials or opportunities to offer for both the Libyan economy and the world as follows:

2.4.1 Libya's Location, Population & Climate

Libya is a country located on the North shore of the African Continent by the Mediterranean Sea, with a coastline of approximately (2000) kilometres. It has a total land size of some (1,760,000) square kilometres. To the East is Egypt; to the South are Sudan, Chad and Niger; and to the West is Algeria and Tunisia. According to the census of population carried out in 2006, the total Libyan population amounted to some 5.3 Million people (51% males and 49% females). In addition, there were an estimated 0.5 million are Non-Libyan Nationals resident in the country at that time. However, the urban population accounts for some 2.5 million people and is growing at relatively high rate of some (7.5 %) annually. The national population growth has decreased significantly in recent years and now stands at about (2.2 %) per annum. Some (38.5 %) of the population of 1.03 million are economically active. With an estimated 1.7 million children under the age of 15 years, pressures are likely to mount to find increased employment opportunities for the new generation in the future. New growth in the tourism sector could provide a significant number of jobs for them.

In Comparison to the country's huge land area, Libyan's population is very small, and characterized by a youthful and geographical highly concentrated population on based on the coast line in the North. Libya is the fourth largest country on the African continent, the strategic core of Arab African Nations, with one of the smallest populations of all African States living in such in oil-based rich economy. With unique geographical space that links Africa with Europe and the world. On the other hand, Libya enjoys a beautiful and modest weather climate with temperatures ranging between (15-35.C) all year round in four normal seasons that could be attractive to tourists.

2.4.2 Tourism Attractions in Libya

The attraction for any tourism destination can be categorized as; climate, scenic, cultural, historical, and the exercise a gravitational influence on non-residents. One or a range of attractions can influence the choice of a destination. Tourists worldwide vary in their choices for travelling to tourism destinations. As a result, their ranking will be in a subordinate of different preferences. However, Libya is one of the world's newest and most exciting tourist destinations. It has a length of coast-line along the Mediterranean

Sea which makes it a productive area for sea sports, diving and all kinds of beach activities. There are also, ancient archaeological cities and cities and monuments from the Roman, Phoenician, Greek and Islamic civilizations, along with other historical mosques and churches, as well as museums with their splendid and fine antiquarian possessions. Moreover, there are many attractive areas of the Libyan Desert with an extensive wealth of pre-historic art, folklore and culture of the oasis towns and lakes in the Great Sahara.

However, the most popular tourism attractions in Libya may be clarified into the following:

- The Desert: According to a desert tourism study carried by some experts in the sector (1997), the Libyan Desert represents over 90% of the land area. There are many attractive sites of which could be so interested to international tourists, such as the extensive wealth of pre-historic art, the agriculture systems and urban fabric of the oases settlement, the desert lakes and the distinct folklore and culture of the oasis towns in the southern part of Libya.
- The Mountains: In the Eastern part of the country, enjoy almost 600 km of green covered mountains along the sea side with a beautiful sun shine all year around and characterised by narrow wades and steep valleys. In the Western part of Libya, there is chain of almost 400 km of mountain chains with many ancient sites to be visited by international tourists.
- Historical & Cultural Attractions: Archaeology has been an important element of tourism in the Mediterranean, especially in Egypt and Tunisia. Libya has a number of the best classical antiquities in the world. In the western and eastern part of the country, most significant archaeological remains far away to the Phoenician, Greek, Romans eras, who founded the cities of Sabratha, Ghadames, Shahat, Sousa, lebda, etc, detailed below:
 1. Sabrata (Sabratha): Located 70 km west of Tripoli (the capital of Libya), was found to be the earliest Phoenician settlement from the around the 6th century BC buried under the ruins of the Roman towns built late between 139-180 AD and part of it still under the Sea.
 2. Lebda (Leptis Magna): Located 100 km east of Tripoli is also argued to be one of the oldest Phoenician towns in Northern African Region. It is the most outstanding

archaeological settlement in Libya and was an important trading centre during the Roman rule because of its location and as the birthplace of the Emperor Septimus Severus.

3. **Shahat (Cyrene):** Located 200 km east of Benghazi (the second biggest city in Libya), was founded around the middle of the 7th Century by Greek immigrants. Cyrene then gradually developed into a kingdom, which reached its peak around 400 BC, becoming second in importance only to Athens and was later revitalised under Roman ruling empire.

4. **Sousa (Apollonia):** Located 15 km to the north of Cyrene along the coast was a port built around the same time. It became the principal city in the province flourishing under Byzantine rule and again under the under Turkish Empire, taking on a new name in 1897.

5. **Ghadames (cydamae):** Located 600 km Southwest of Tripoli as an oasis in the middle of the desert. The Garamants and Muslim civilisations have all left their footprint on the city's houses, caves, and dunes as been the most important commercial centre in the region.

2.5 Impact of Tourism on the Libyan Economy

Libya's economy depends heavily on oil revenue and remains largely state controlled and regulated. In 2001, some (35.6%) of Libya's GDP was from the oil and gas sector. In addition, the oil sector generates more than (90%) of the country's hard currency. The state's authorities are keen to establish other sectors (beside the oil factor) to sustain the national economy. Tourism has been suggested as a top alternative to contribute to a high percentage of the country's GDP. Tourism is undoubtedly a key factor of economic development, especially for developing countries, particularly from the standpoint of investment and job creation. It also paves the way for trading between nations, and contributes to the creation of a climate of mutual tolerance and respect.

In Libya, despite (UN Sanctions from 1992 – 2001) prohibiting air traffic from flying to or from Libya forcing tourists to travel by land or sea, tourism is still the country's fastest growing sector. Tourism is also the only source of hard currency other than oil exports and in relation to this many tourism related services have been established. Since sanctions have been suspended, the situation has become more stable. However, the tourism industry is relatively new and fast growing despite obstacles in previous years

such as sanctions on flights to and from Libyan airports. Little funding has been generated towards research for the industry, apart from research funded jointly by the World Tourism Organisation (WTO) and the Libyan Government, which resulted in (The Tourism Master Plan 1999-2018). Indeed, there is now considerable attention being paid to the tourism industries of developing economies, especially those in Eastern Europe, Africa and the Middle East including Libya, where European tourists account for the largest number of foreign visitors especially from Germany, France, Italy, UK, Spain and Switzerland. The increase in the number of tourists is mainly due to the fact that Libya has some of the best preserved Roman ruins in the World, and also because it is considered an exotic vacation for adventurous Europeans.

Libya is currently enjoying unprecedented economic stability, which is especially marked when compared to the economic difficulties experienced during the 1990's. In fact, oil income has become slightly higher with foreign investment flowing in, and the gross domestic product (GDP) increased by 6.5% in 2000 (Takeyh, 2001). Also, licenses have been granted for more than 30 projects financed by direct foreign investments in different tourism attractive sites in many areas of Libya which will cost billions of dollars and would create more than 5,300 new jobs in the future.

Furthermore, to assess the impact of international tourism on the national economy, which extends beyond spending on hotels, flights and eating in cafes or restaurants, there are some important factors and challenges, which need to be discussed. These are as the following:

2.5.1 Underestimating Tourism's Contribution to the National GDP

The tourism industry in Libya consists of many enterprises and institutions ranging from educational institutions to restaurants, hotels, museums, fast-food outlets and tour operators/travel agencies etc. The majority of these companies do not belong to a chain of companies. In fact, the impact of tourism on Libya's national economy cannot be recognized due to the lack of a solid, comprehensive, and internationally uniform information base. Internationally, efforts has been made, particularly by developed countries, to address such weaknesses, although, progress has been slow. As cited by Tohamy and Swinscoe (2000), except for a few developed countries, statistical

information on the whole remains scanty, incomplete, and for the most part focused on simple calculations of international arrivals without any subsequent analysis of the impact of tourism activity on its respective economy or the real reaping benefits of tourism (Sakr, 1999).

Regarding the Libyan case, as it can be observed from the data and information gathered by the researcher, the contribution of the tourism sector in the national economy is not clear as it is integrated with the trade sector and focused only on hotels and restaurants. International tourists' expenditure on hotels and restaurants only represent a fraction of their total expenditures in the whole economy. It has been estimated that international tourists spend an average of (30% - 40%) of their total spending on hotels and restaurants. The remaining (60% -70%) filters into other sectors of the economy such as transportation, recreational services, retail etc. National Accounts, therefore, inevitably underestimate tourism's contribution to GDP of the Libyan Economy.

As a result, the effect of international tourists' spending on the demand for other sectors' output, employment and so on cannot be directly attributed to the tourism sector unless these expenditures are traced in each of the affected sectors. Furthermore, tourist expenditures and demand for different goods and services translate into demand for workers to produce these goods and services.

2.5.2 Economic Impact Analysis of Tourism Expenditure

Tohamy and Swinscoe (2000), state that tourism involves many different products (transportation, lodging, meals, entertainment, retail sales etc) and is defined more by who purchases the good or service than what is purchased. The proportion of sales to tourists by any given industry varies extensively across industries and regions. Not all sales (even hotels or restaurants) are necessarily to tourists. As a result, this makes the careful accounting of tourism's economic contribution difficult. One cannot simply add up sales, income and employment reported in government statistics for a set of well-defined sectors to estimate tourism's economic contribution. Table (2.4) highlights the number of industries that are involved in the travel and tourism industry both directly and indirectly. These characteristics are particularly important when considering the role of

travel and tourism in job creation, its concentration in small and medium enterprises, its regional diversification capacity, and its labour-intensive nature.

Table (2.4): Tourism Industry (A Comprehensive Picture)

The Core of Tourism Business		
Accommodation:	Food and Beverage:	Reservation Systems
Hotels Resorts	Restaurants	Auto Clubs
Motels	Fast Food	Entertainment/Arts Venues
Hostels	Wine Merchants	Museums/Historical Sites
Caravans	Travel Agencies	Construction/Real Estate
Camping	Tour Companies	Distillers/Brewers/Bottlers
Transportation:	Souvenirs	Auto/Aircraft manufacturers
Airlines	Luggage	Motor Fuel Producers
Cruise Ships	Hotel/Restaurant Suppliers	Clothing Manufacturers
Rail	Taxi Services	Communication Networks
Car Rental	Cameras and Film	Education/Training Institutes
Bus Coaches	Maps, Travel Books	Recreation/Sporting Equipment
Attractions:	Shopping Malls	Food Producers
Man made	Service Stations	Advertising Media
Natural	Sporting Events	Cartographers/Printers
	Banking Services	

Source: Australian National Tourism Strategy (1992) in Tohamy and Swinscoe (2000)

As cited by Frechtling (1999), countries have addressed the need for an accurate assessment of tourism's contribution to GDP at two distinct levels, which to a great extent follow the developed-developing lines. Developed countries, (although not all of them) have opted for the creation of Tourism Satellite Accounts (TSAs). These accounts developed separate tourism accounts at the primary data collection level. Parallel to the UN national accounts sectors, these accounts provide the appropriate input-output relationship for all tourism related economic activities, and not just hotels and restaurants (WTO, 1998). For example, a fraction of the income made by a grocery store near a tourist resort will be included in the tourism satellite accounts.

However, regarding developing countries, data collection capabilities do not usually lend themselves to such a detailed level of data collection. Thus, they rely more on what is called "the economic impact analysis of tourism". Libya may adopt the use of such tools

at present for data collection to assess the direct and indirect contribution of the tourism sector to economic activity without having to wait until it starts investing in an extensive TSA primary data collection system. And in the context of assessing tourism's contribution through economic impact analysis, tourists' expenditures are assigned to the corresponding sectors, producing direct impact of tourists' expenditure on various sectors. The economic impact analysis then follow linkages between tourists' expenditure on goods and services as well as demand for intermediate goods that are necessary to produce these goods and services, In addition to consumption demand resulting from income earned by workers and business producing these goods and services (Frechtling, 1999).

As cited by Tohamy and Swinscoe (2000), Frechtling (1994) states that, in order to determine the economic impact analysis of tourist expenditure the following data sets are needed: Visitor spending surveys, analysis of secondary data from government economic statistics, input-output models and different sets of multipliers. These elements are captured in the following equation:

$$\textit{Economic impact of tourist spending} = \textit{Number of visitors} * \textit{Average spending per visitor} * \textit{Multiplier}.$$

International visitors are counted at points of entry. Total visitor spending is obtained by multiplying the number of visitors by an average spending per visitor. Spending levels of different types of visitors may be measured in surveys of random samples of visitors, for example, where leaving the country. At present most international tourists visiting Libya book for inclusive holidays, which facilitate conducting the economic impact analysis of tourist expenditure more than if they were independent travellers. Spending estimates can be converted to various measures of economic impacts using economic ratios and multipliers for tourism related-industries. For example, tourism spending in hotels can be converted to the associated income and jobs using ratios of sales to income and sales to jobs in the hotel industry. Frechtling (1994) added that the economic impact of tourism spending produces the following indicators:

- **Direct effects:** Production changes associated with the immediate effects of changes in tourism expenditures. These include the sales, income and jobs in businesses that receive the tourist spending. For example, an increase in the number of tourists staying overnight in hotels would directly yield increased sales in the hotel sector. The additional hotel sales and associated changes in hotel payments for wages and salaries, taxes, and supplies and services are direct effects of tourist spending. It is reasonable to think that as many as 1.5 jobs per room can be created in the hotels alone (WTO, 1998). Apart from the hotel workers, other examples of direct tourism employment would include: Tour operators/travel agents, tour guides, and hire car operators and those public sectors workers involved with tourism, such as national tourism office personnel etc.

- **Indirect effects:** Production changes resulting from various rounds of the re-spending of tourism industry receipts in industries supplying products and services to the tourism industry. These are the resulting changes in economic activity in backward-linked industries, i.e. those businesses, from whom the direct tourism businesses purchase goods and services: The level of indirect employment created depends on the ability of local businesses to meet the needs of the tourism sector. For example, changes in sales, jobs, and income in the linen supply industry due to a change in hotel sales present indirect effects. In addition, businesses supplying products and services to the linen supply industry represent another round of indirect effects, eventually linking hotels to many other economic sectors in the region. For instance, the complex, integrated economics of Sri Lanka and Egypt can meet almost all the needs of the tourism sector, here, indirect employment generated could be more than 1.5 indirect jobs per direct job. On the other hand, countries with a limited mix of economic activities and have limited capacity to meet the needs of the tourism sector such as Libya, indirect employment will be low might be at the level of 0.25 indirect jobs per direct tourist job according the data published by the (WTO, 1998).

- **Induced effects:** The change in economic activity resulting from household spending of income earned directly or indirectly because of tourism spending. For example, hotel and linen supply employees supported directly or indirectly by tourism spend their income in the local region for housing, food, transportation, and the usual array of household product and services satisfying their own needs or desires. The

amount of employment induced into the economy by this method depends on whether or not local businesses have sufficient goods and services to meet the need and desires of tourism employees and their families. It is difficult to calculate induced employment but a working assumption based on the experience of some countries could be that about 0.2 jobs are induced into the economy per direct job resulting from tourism employment (WTO, 1998).

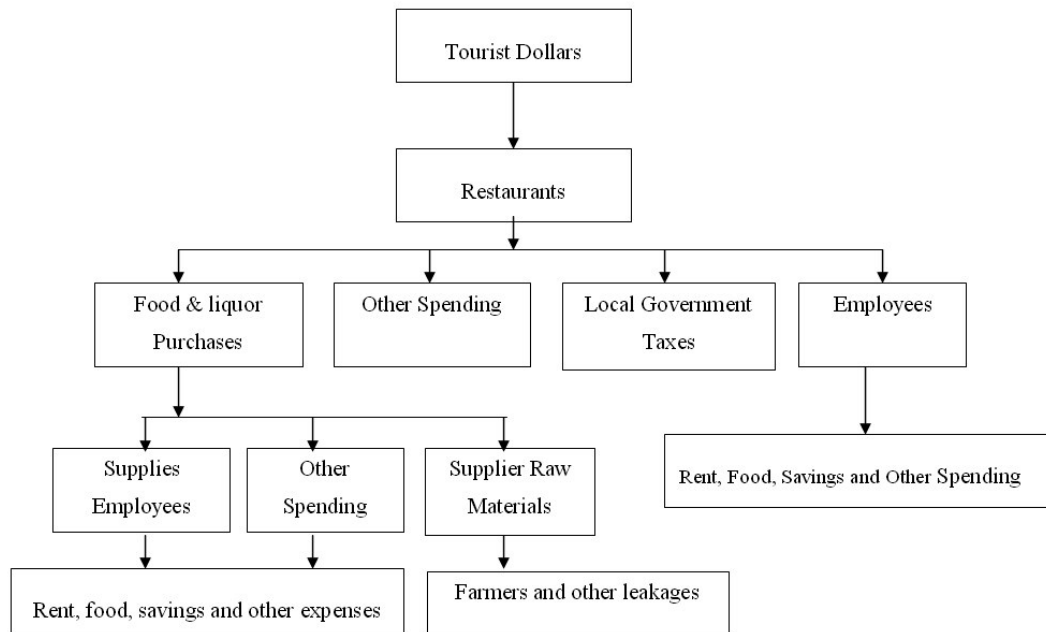
Moreover, according to Dwyer et al (2004), Computable General Equilibrium (CGE) models are now extensively used, especially in Australia, the UK, the US and Canada, to estimate economic impacts of a wide variety of changes and policies, across most sectors. CGE techniques have been used in the tourism context, but so far, not extensively. CGE models go much further than TSAs with them it is possible to tell what impact a change—such as a 10% increase in inbound tourism, will have on variables in the economy, including GDP, employment and exports. TSAs cannot be used for this purpose. As long as a CGE model has an explicit tourism sector, it will embody a TSA. Some types of issues, which can be explored using CGE analysis, are as follows:

- What impacts will a change in domestic or international tourism, have on economic activity in a country or region?
- What impact will an increase in outbound tourism have on activity in the home country?
- What impact on state or national activity will a special event, such as a Formula One Grand Prix or a music festival in a small town, have?
- How will a general tax change, such as the introduction of a Goods and Services tax (GST) or Value Added Tax (VAT), impact on the tourism sector and on output generally?
- How will changes in international aviation regulations impact on tourism activities and other activities in the economy as a whole?
- How will tourism crises, such as that of September 11th in 2001, the SARS Epidemic in Asia, the unsolved issues in the Middle East and the war on terrorism impact on the economy?

2.5.3 Multiplier Effect and Size

In a wider context, societies should strive to allocate their natural resources to the optimum possible uses. Exploiting natural resources has a direct effect on any society's well-being, particularly if it is classified as a developing nation as Libya. National resources are a good source of revenue. This revenue is essential in assisting policymakers in promoting socio-economic objectives. As a result, this factor has a direct and indirect snowball multiplier effect on production, employment and consumption, as well as revenue to the government's coffers (Salih, 2003).

Coltman (1989), states that there is one important aspect in tourism, which is worth investigating its multiplier effect. To understand this effect, a restaurant where tourists spend their money can be a good example. To be in business a restaurant operator had to buy equipment and furniture and decorate the restaurant. Ultimately, the payments for those items will be made to equipment and furniture manufacturers, who in turn will pay their employees who in turn will spend that money in the local economy. Some of the people receiving it will put some of the money paid out by the restaurant in banks. This money will be lent by the banks to other people who need to borrow it to finance the purchase of homes and cars. The banks will pay interest to depositors and profits to shareholders. In other words, the money paid by restaurant patrons will pass through several sets of hands, or layers of the economy, which is known as the multiplier effect. The more layers or levels that the money passes through, the higher will be the multiplier effect as illustrated in figure (2.5). This in return will prove that some people benefit economically and socially from tourism money's multiplier effect without realizing it or even notice it. A dairy farmer who sells his milk to a company that processes it and sells it to wholesalers that sell it to restaurants. Although, that dairy farmer would probably not know that he is gaining from tourism's multiplier effect.



Source: (Coltman, 1989)

Figure (2.5): Tourism Multiplier Effect

As tourism is much more labour intensive, tourism's multiplier effect is higher for a local economy than a manufacturing plant's multiplier effect would be. In addition, tourism's natural resources will not be moved from the place where they locate. Thus, the local inhabitant will benefit from those natural resources in generating employees and benefiting the businesses.

Furthermore, tourism comprises many relatively small businesses. The revenue from tourists is quickly filtered down to a broad cross section of the population, thereafter increasing the multiplier effect. Consequently, the whole community shares the economic benefits derived from the visitors (Coltman, 1989). On the other hand, some money brought into an area by tourists will leave that area. This is known as leakage. For instance, if a hotel has to import buffets and beverages from another country, the multiplier effect on the local area will be reduced. Coltman (1989) added that there are other forms of leakage, which can be classified as follows:

- Commissions to travel agents or tour operators abroad.
- Advertising and promotional expenditure paid to businesses outside the country.

- Tourists' use of credit cards and travellers checks that do not benefit local banks.

To conclude, it can be said that the more a country's economy is self-sufficient, the less it will need to import goods, and the larger its multiplier will be, as the less leakage there will be.

2.5.4 Diversification and Tile National Economy

Many developing countries now regard tourism as an important and integral part of their economic development. The benefits of tourism are usually felt at two levels: macro or national, and micro or sub-national level. At the first level, tourism is expected to foster economic growth through foreign exchange earnings and an increase in the state revenue. At the second level, there are improvements in people's well-being in the areas of job creation, revenue or income distribution and balanced regional development (Dieke, 2003). Libya in this stand as a small economy has no nature resources of value, except oil, which currently represents more than 90% of the country's hard currency. The growth in the non-oil sectors of the economy has been extremely limited. Therefore, the need for economic diversification has become essential and the major challenge for planners and decision-makers in Libya is how to achieve sustainable diversified economy. On the other hand this mean that governments of developing countries, including Libya, have introduced tourism as an attractive developmental option to sustain the national economy, which for many years has been bolstered by the oil industry. The primary aim of the Libyan economic development plan in the 1980's was based on the diversification of the economy away from oil (WTO, 1998).

Therefore, this recognizes ongoing economic diversification opportunities represented by the development of the tourism sector and its integration within wider economic planning. In addition, tourism development could achieve community well-being for inhabitants all over the country, because each area specializes in particular tourist products and uniqueness of culture, which could make a great attraction to different market segments that, will benefit the country in the future.

Moreover, tourism development could create more leisure and construction activities for other areas away from the capital, which may encourage settlement of people in rural areas, who seemed to prefer the urban areas for job seeking purposes. In addition, tourism

can be a tool to motivate governments to inject more money in improving infrastructure, especially in the initial stage of tourism development. Many developing countries cannot afford to finance construction internally. Thus, the need for cooperation between public, private and foreign investment becomes essential.

According to Font and Ahjem (1999), developing a new tourism related product or service, requires intensified efforts at the initial stages in order to gain a proportion of the market share and then to maintain this position in the medium to long run. In Libya, where tourism is viewed as an economic alternative for gaining economic growth, should make investment as easy as possible for prospective investors. Consequently, this could lead to an increase in the tourism market share and be an ability to compete more effectively and succeed in a highly competitive world economy.

2.6. Conclusion

Tourism development is seen as a way of improving a country's economy and social well-being. Tourism has become a very important sector for many developed and developing countries. Countries such as Cyprus, Turkey, Portugal and Egypt etc, represent a good example of the importance of tourism to the national economy. Many developing countries, including Libya have focused their attention on developing their tourism sector and tourism-related industries as well as strengthening their co-operation in this important sector. Every year a larger proportion of the world population takes part in tourism activity and, for the majority of countries, tourism has developed as one of the most dynamic and fastest growing sectors of the economy. Tourism is Libya's fastest growing sector. Tourism is also the only other source of hard currency other than oil exports. Developing countries are less self-sufficient than developed economies and are more liable to have to import such things as foodstuffs, beverages, construction materials and supplies.

The consequences lead to a high leakage from the local economy. As a result, developing countries should be more self-sufficient by trying to cut down their imports, build more trust in their local private sector and, stop or reduce turning to foreign countries seeking assistance.

For Libya, economic diversification becomes important in order to reduce its economic dependence on oil revenue and tourism might be the best option. This can be achieved by establishing a strategic investment policy leading towards sustainable development. In return, this all will be a panacea for solving the problem of leakage, increasing the level of tourism benefits all for the Libyans and providing a prosperous economy. The Libyan state-dominated economy depends on oil revenue, which provides all export earnings and a high percentage of the country's GDP. Despite the problems, which were the main reason for delaying the development of the sector, at present it can be said that tourism is the country's fastest growing sector. In addition, many observers have suggested that Libya may well now endeavour to develop a more market-oriented economy with the tourism industry an obvious sector to develop. Tourism is also the only source of hard currency other than oil exports and, in relation to this, many tourism organisations have been established. Since Air Embargo has been lifted, the situation has become more stable.

European tourists account for the largest number of foreign visitors especially from Germany, France, Italy, Spain and Switzerland. The increase in the number of tourists is mainly due to the fact that Libya has some of the best preserved ancient ruins and one of the biggest archaeological sites in the world, and also because it is considered an exotic vacation for adventurous Europeans.

Tourism's contribution to the national economy has been underestimated. The contribution of the tourism sector in the national economy is not clear as it is integrated with the trade sector and focused only on hotels and restaurants. International tourists' expenditure on hotels and restaurants only represents a fraction of their total expenditures in the whole economy. The need for a solid, comprehensive, and internationally uniform information base on the economic impact of tourism has become essential. One other important aspect of tourism, which has been investigated in this chapter, is its multiplier effect. The subsequent chapter focuses on significant issues concerning policies and planning towards developing a new tourism marketing strategy or practices that in return will support the stand to enhance the Libyan economy with alternative resources of income.

3. TOURISM MARKETING STRATEGIES

3.1 Introduction

Tourism marketing and promotional efforts are the basic activities to link the product with the potential tourist market both at national and international levels. The concept about marketing and the importance of tourism marketing for the success of tourism development is highlighted in this chapter. The main objectives of the chapter are to formulate a marketing strategy on a reliable base and to set up the factors, which have a particular influence on the decision- making process of the tourist customers to visit a particular destination. In addition, markets consist of customers, and customers are likely to differ from one another, thus, marketing policy should be carefully considered. As a result, marketing research is required to analyze tourist behaviour, motivation to travel abroad, attitudes and images towards particular destinations etc. Moreover, the chapter will also introduce the four principle variables (product, price, place and promotion), which managers have to continuously consider in their efforts to manage customers' demand in the tourism sector.

3.2 What Is Marketing?

Marketing is about anticipating demand, recognizing it, stimulating it and finally satisfying it. It is the function of business to produce goods and services that satisfy consumer wants and needs at a profit. Dibb et al (1994) have quoted the definition of marketing offered by the Chartered Institute of Marketing which is as follows:

“Marketing is the management function which organizes and directs all those business activities involved in assessing customer needs and converting purchasing power into effective demand for a specific product or service, and in moving that product or service to the final consumer or user so as to achieve the profit targets or other objectives set by the company or other organization”.

Kotler et al (2003) defines marketing as:

“A social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging product and value with others ”.

Kotler argues that the definition is built on the main concepts of wants, needs, demand, and satisfaction for both marketing and marketers because they are central to the study of marketing.

- The Concept of Tourism Marketing

Kotler (1991) defined the marketing concept as:

"The key to achieving organizational goals consists in determining the needs and wants of target markets and delivering the desired satisfactions more effectively and efficiently than competitors" (Cited by Middleton, 2001).

Middleton (1988) explains that tourism marketing is not a separate discipline but an adaptation of basic principles, which have been developed and practiced across a wide spectrum of consumer/ customer products. However, marketing contribution to travel and tourism has been undervalued by both policy makers and practitioners, leading to misunderstanding of the nature and value of the markets discipline for the travel and tourism industry in general (March, 1994).

3.3 Tourism Marketing Segmentation

Segmentation refers to the way in which companies and organizations classify and categorize customers into clearly defined groups with similar characteristics, and similar needs or desires (McDonald and Dunbar, 1995). One of the most important strategic concepts contributed by the marketing discipline to business forms and other types of organizations is that of market segmentation. For segmenting a market, demographic segmentation has been one of the major used methods, which consists of dividing the market into groups based on demographic variables such, as age, gender, family life cycle, income, occupation, education, religion, race and nationality. Moreover, the reason for the popularity of this method is that consumer needs, wants and usage rates often vary closely with demographic variables (Bowen, 1998).

According to Middleton (2001), market segmentation is normally the logical first step in the marketing process involved in developing products to meet customers' needs. In addition, it is the necessary first stage in the process of setting more accurate marketing

objectives and targets and the basis for effective planning, as well as, budgeting and control of marketing activities. Also, it's the basis for positioning, branding and communicating relevant images to targeted users.

- Definition of Marketing Segmentation

Middleton (2001) defines segmentation as:

'The process of dividing a total market such as visitors, or a market sector such as holiday travel, into subgroups or segments for marketing management purposes'.

Its purpose is to facilitate more cost-effective marketing through the formulation, promotion and delivery of purpose-designed products that satisfy the identified needs of target groups.

Kotler et al (2003), define market segmentation as:

"Dividing a market into distinct groups of buyers who might require separate products and/or marketing mixes ".

Marketing segmentation is not only a statistical technique used to analyze demand; it is also a management tool that leads to specific marketing decisions. Moreover, the marketing process of segmenting the tourism market should be the basis for strategic long-term marketing and management decisions. The identification of market segments and their individual characteristics are the ultimate stage to the development of a marketing strategy (Middleton, 2001).

- The Importance of Segmentation

According to Sharma and Lambert (1994), segmentation has been used extensively in consumer marketing over the last 30 years. It is recognized that effective segmentation requires the segments to be measurable, accessible, substantial and homogeneous. In addition, segmentation should have strong links with the competitive strategy of the organization.

As a multitude of products and brands is offered by organizations, the need for market segments becomes essential. These organizations move away from mass marketing

towards a target marketing strategy where the focus is on a particular group of customers. The purpose of market segmentation is to identify the taxonomy of consumption patterns by dividing a market into several homogeneous sub-markets (Lin, 2002). The market segmentation process aims to divide a market into several market groups. Customers in each market segment have similar product needs. Each segment requires a different mix of marketing strategies to satisfy its special consumer needs.

- **Criteria for Marketing Segmentation**

In order to achieve an efficient use of marketing resources, segmentation should respect a number of conditions. Several authors including Lumsdon (1997), Baker (1991) and Smith (1989) have attempted to explain criteria for effective segmentation. A market segment must possess the following distinct characteristics:

A) Identifiable

The segment must comprise customers who seek identifiable similar benefits from a tourism offering rather than having differing needs. This subsequently may facilitate the accuracy of data collection.

B) Measurable

The segment must be defined in order to obtain adequate information about buyer characteristics. The marketer should be able to estimate the size and potential spend associated with the segment, bearing in mind social and commercial aspects.

C) Substantial

The segment must be big enough to justify the cost and effort of an individual or organization. Organizations could segment each holiday programme in separate brochures. For example, for those who enjoy walking, cycling and sightseeing in one brochure and those who seek underwater exploration or water sports in another?

D) Accessible

The organization must be able to reach the segments through existing information channels. The channels should allow the message to reach only or predominantly the target audience and not other groups, which are not likely to respond to the message.

E) Actionable

There should be a match between source level, commitment and achievability in terms of penetrating the defined market segment. An organization needs to be able to action a database or other source of intelligence to ensure effective positioning.

- **Benefits from Market Segmentation**

Achieving the potential benefits of segmentation requires that appropriate customer segments are identified and relevant marketing programmes implemented. While the academic literature offers wide-ranging advice on segmentation analysis issues, such as the selection of segment bases and choice of multivariate techniques, the actual practice of segmentation is comparatively neglected (Dibb and Wensely, 2002).

Meadows and Dibb (1998), indicate that the underlying aim of market segmentation is to group customers with similar needs and buying behaviour into segments, so that each segment can be reached with a distinct marketing programme. The concept attempts to bridge the gap between diverse customer needs and limited company resources, by encouraging distinct product and marketing offerings to be developed to suit the requirements of different customer segments. The marketing literature suggests that segmentation leads to more satisfied customers, because it offers the practitioner a number of clear benefits improved understanding of customer needs, more appropriate resource allocation, clearer identification of market opportunities, and better-tuned and positioned marketing programmes. However, segmentation at the specific level is especially useful for segmenting customer markets and using databases in direct marketing, in both customer and business-to-business markets. Often, a sort of pyramid approach is taken (Raaij and Verhallen, 1994). Market segmentation is central to the tourism company's marketing planning process and has been used widely in the hospitality & tourism industry (Baloglu et al, 1998).

According to them, market segmentation offers suppliers of the tourist several benefits: They are in a better position to compare market opportunities; they can analyze the needs of each segment in the light of the current competitive offerings and determine the extent of current satisfaction. In addition, sellers can make appropriate adjustments to their product and marketing appeals. In addition, sellers can improve marketing programmes

and budgets based on a clearer idea of the response characteristics of specific market segments. They can allocate funds to the different segments in accord with their likely levels or purchase response. Finally, for suppliers of the tourist product, it is possible to assess its strengths and weaknesses through identifying market segments. Therefore, systematic planning for future markets is encouraged.

3.4 Marketing Tourism Destinations

Hall (2000) states that, although destinations have long promoted themselves to potential visitors, there has been qualitative change in the nature of place promotion since the early 1980s, when shifts occurred to reduce the role of the state in a globalizing economy. Within the tourism sector, tourism destination could be identified and marketed based on a number of elements, which combine to attract visitors to stay for a holiday or a day visit. These elements of the destination mix are in most cases inherited from previous generations. The marketer has no control over these elements and therefore, they can be classified as external factors. Where in the global tourism market place a country is often associated with a unique tourism product and/or destination. In this context, Austria is associated with the mountains and rural tourism. On the other hand, a country like Egypt and Libya is associated with cultural and historic tourism. While Mediterranean countries are basically associated with seaside tourism. As a tourism market, Portugal is associated with sun and beach tourism (Yasin et al, 2003).

However, there are four core elements: First, the prime attractors, which are the main attractors appeal to the visitor and differentiate one destination from another. Some of which are international, while others pertain to a country or on a regional basis. The Roman Empires in Libya and Pyramids in Egypt could make a good example of such attractors. Second, the built environment, which encompasses the physical layout of a destination including waterfronts, promenades, historical quarters and commercial zones. In addition, major elements of infrastructure such as road and rail networks, plus open spaces and communal facilities are important. For example, London Docklands, Boston Waterfronts and the Roman Quarter in Paris. Third, the supporting supply services (essential facilitating services) such as accommodation, communication, transport, refreshment and catering, entertainment and amenities. Finally, sociocultural dimensions

(cultural attributes) such as bridges between past and present, the mood or atmosphere ranging from sleepy to vibrant, the degree of friendliness and cohesion between the host community and visitors. For example, the friendliness of the Greek islands, the nice character of the Irish people in Ireland, and the salsa music of La Habana, Cuba (Lumsdon, 1997).

This proves that any national tourism office responsible for marketing a destination will usually take on a role of providing a core strategy document. This will outline the way in which private and public sector organizations can coordinate resources to develop and promote a destination. In some instances, a tourism authority will achieve some degree of success in planning tourism development, monitoring progress in communicating the principles and targets widely.

Therefore, official organizations should put into consideration internal marketing, which plays a significant role in the promotion of tourist destinations. Internal marketing is the promoting of the organization and its product(s) or product lines to the organization's employees (Greene et al, 1994). As cited by Crick (2003), successful internal marketing educates and motivates staff to double their efforts towards the achievement of organizational objectives and helps them to understand their role in the achievement of those objectives. In addition, marketing analysis and techniques aim at the internal market of the organization to make the necessary changes for the external strategy to be more effective (Greene et al, 1992; Rafiq and Ahmed, 2000).

Furthermore, successful implementation of tourism programmes depends on the internal marketing of tourism to the community. The host community should be informed of the benefits of tourism with the goal of helping it to better understand tourists and their motives for travelling to the destination (Crick, 2003). In other words, internal marketing is usually directed at creating an acceptance to tourism despite its problems, to influence the attitudes that the host population holds towards tourists as well as the way that they interact with tourists. To achieve this approach, media campaigns aimed at the public through radio, television newspapers, etc emphasize the financial benefits that can be generated from the tourism industry. In addition, other programmes aimed at tourism employees, train them in the appropriate behaviours and attitudes by developing their own self-esteem and knowledge about the industry. It is generally recognized that

tourism promotion is a very costly activity, where many developing countries have a small proportion of the international tourist market and such proportion may not be sustained by the huge promotion expenditures to take a larger share of the market. In addition, many developing countries like Libya are considered long-haul destinations. Therefore, the cost of a holiday is relatively high.

For these countries, in order to promote their tourist products more effectively, the potential and actual tourists may find it more attractive if a multi-destination package results from their high expenditure and long travel time. As a result, tour operators can satisfy their customers and maximize their profits by organizing packages for multi-destination holidays. Libya and some other African countries might be a good example for a multi-destination package. The tendency towards this type of tourism offers countries within a region the possibility of promoting a regional image. On the other hand, countries within the region at a more advanced level of tourist development might oppose this concept since they would prefer the tourists to stay in their own country so that can obtain maximum benefit of tourism and generate more profits.

3.5 Enhancing Tourism Destination Images

The image of a place as a pleasure travel destination to both tourist receiving countries and tourists is very important. One of the most important tasks of marketing management within the tourism organizations is to develop or maintain the destination image in line with the visitor groups being targeted. Image is therefore considered integral to the destination and is a well-researched area in tourism (Gartner, 1993). In fact, image to a greater or lesser extent, is derived from attitudes towards the destination's perceived tourism attributes.

- **The Meaning of Image**

As cited by Murphy (1999), destination image has been seen as a pivotal aspect of promotion strategy, since tourism marketing has a root process whereby attributes of a destination are matched to the needs of one or more market segments through a promotion campaign. The image formation process is an integral part of the destination selection process since, at all stages in the selection process, a tourist's images help to

determine which destinations remain for future evaluation and which are eliminated from future classification (Gartner, 1993). There are two types of image-organic and induced. Organic image is based primarily on information assimilated from Non-Touristic, Non-Commercial sources such as general media, education, and opinions of family and friends, and actual visitation. While the induced image is developed after efforts have been made by the consumer to use commercial information sources that may alter the organic image (Gartner, 1993). According to Echtner and Ritchie (1991), destination images seems to be derived from a much wider information sources than the majority of products and services and the distinction between organic and induced images is important to the formation of destination images.

Jefferson and Lickorish (1988), state that tourism Image reflects tourists' expectations and anticipations. In fact, image describes the degree to which a tourist area can satisfy tourist needs and wants. Satisfaction of customers happens to the cheapest means of promotion, which is considered the most expensive element among the other marketing mix elements (Pizam and Ellis, 1999). In addition, identifying the attributes of an image of a tourist destination helps to find adequate ways of improving tourist quality by rearranging tourism products and revising tourism planning. This results in attracting more tourists and creating more opportunities.

- The Importance of Image

Destinations may claim a position on visitors' minds for the services they offer by emphasizing selected attributes such as, drawing contrasts with competitors. However, the image which a person has of any product is highly subjective and therefore, it is not easily quantifiable (Laws, 1991). Therefore, by taking a survey of the importance of each attribute from the customers, one can capture valuable and accurate information about which attribute to include in the measurement. The aim of doing this is to balance the key information needs of management with the needs and issues of the customers (Vavra, 1997). Despite the availability of a wide variety of attraction, some destinations fail to fulfil their tourism potential due of their negative images. Thus, much marketing in tourism is designed to attract people to particular destinations. Images are of paramount important because they transpose representation of an area into the potential tourist's mind and give a pre-taste of the destination. As a result, most attempts to understand and

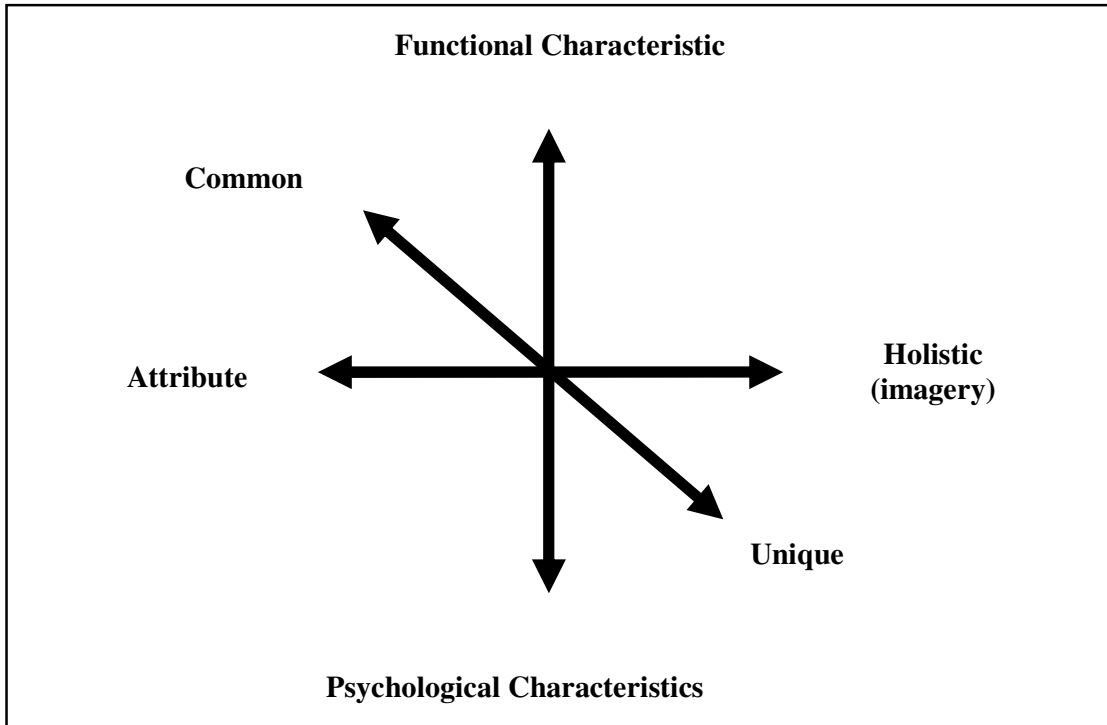
predict destination choice attributes include measurement of the importance of various destination attributes such as, climate, natural and cultural attractions, tourism infrastructure etc.

- Tourism Destination Image

Choosing a destination or a vacation package is based on individual likes and dislikes, interests, attitudes, and motives. According to Kassem (1985), image is not only concerned with geographic features such as, mountains, rivers, lakes, seaside, forests or historical places, culture etc. It is also influenced by economic considerations like the rate of exchange, the relative cheapness or expensiveness of meals, accommodation, and various means of transportation.

Moreover, the law of a country with regard to the sale of alcoholic, the opening hours of restaurants, entertainment, safety and sanitation, could influence individuals' behaviour choice of holiday and destination. As cited by Ahmed et al, (2002), when consumers are unfamiliar with the product, country image may serve as a "halo effect", by which consumers infer product attributes. The halo effect implies that country image directly affects consumer beliefs about a product's attributes and indirectly affects their overall evaluations of products through these beliefs (Han, 1989). However, once consumers have adequate knowledge about a country's products, country image became less important in forming their beliefs about the product attributes and their brand attitude. Therefore, a country's image may start to serve as an indirect channel in affecting product attributes and brand attitudes (Bruning, 1997; Erickson et al, 1984 and Han, 1989).

Echtner and Ritchie (1991) state that the image of a destination can be composed of impressions of a core group or traits on which all destinations are commonly rated, while at the other end images of a destination can include unique features and events or auras (See Figure 3.1).



Source: (Echtner and Ritchie, 1991)

Figure (3.1): Dimensions of Destination Image

Echtner and Ritchie (1991) and Gunn (1972), indicate that organic image is based mainly on information estimated from Non-Touristic, Non-Commercial sources such as general media, actual visitation and opinions of families and friends. The induced image is developed after efforts have been made by the consumer to use commercial information sources that may alter the organic image. The traveller creates an image by processing information about a destination from various sources over time. This information is organized into a mental construct that in some way is meaningful to the individual. Gunn (1972) suggests that destination images fall in a continuum beginning with the organic image followed by the induced image and ending in the complex image. The stage of an individual's image depends on his or her experience with the destination. He added that the organic image arises from a long history of non-tourism specific information, such as history and geography books, newspaper reports, magazine articles and television reports that were not intended as tourism-specific.

Therefore, individuals who have never visited a destination nor have sought out any tourism-specific information will likely have some kind of information stored in their

memory. At this point, there might be an incomplete image, to which the traveller adds other bits and pieces. The induced image is derived from a conscious effort of tourism promotion directed by tourism organizations. While the organic image is beyond the control of the destination area, the induced image is directed by the destination's marketing efforts. It depends upon colourful brochures distributed at Visitor Information Centres, information available in travel agencies, travel articles in magazines, TV advertisements, and many other activities a tourism organization might choose to promote the destination. The complex image is a result of an actual visitation and incorporates the experience at the destination. Because of this direct experience with the destination, the image tends to be more complex and differentiated (Fakeye and Crompton, 1991). For instance, while non-visitors perceived Turkey, Italy, and Greece as equally appealing, visitors found Greece less appealing when compared with Turkey and Italy. This means that the image represents the destination in the traveller's mind and gives him or her pre-taste of that destination (Fakeye and Crompton, 1991).

- Role of Tour Operator as Image Creator

According to Atilgan et al, (2003) a tour operator is defined as:

"The principal service provider who is responsible for delivering and/or contracting and monitoring the promised service mix, including all arrangements such as flights, transportation, accommodation, excursions, guidance etc. throughout the service delivery period".

In the simplest and abstract sense, tour operators have an interest in keeping a destination attractive to its clients. It is common, therefore, to invest in a destination by providing attractions or other facilities to improve the desirability of a destination. In addition, they produce and distribute detailed information in the form of holiday brochures, by which clients are encouraged to take purchasing decisions. Also the marketing of many destinations does not begin from a zero base. It begins with a set of negative or positive attributes established over a long period of time based through communication processes largely independent of marketing's control (Hankinson, 2004).

However, the marketing of many destinations does not begin from a zero base, but tour operators can only retain the desired image if the resort is compatible with the market

segment they serve. Therefore, the image of a specific tourist destination may be in part generated from the image of the tour operators that promote holidays in that particular area (Ryan, 1991).

3.6 Branding Tourism Destination

The recognition by marketers that branding can make an effective contribution to the economic development of places such as towns and cities are now well established (Hankinson, 2004). Some destinations have chosen to use branding as a technique to communicate an Image. Branding is a feature of modern marketing methods. It offers the consumer a way of distinguishing between alternative products with similar core attributes (Laws, 1991).

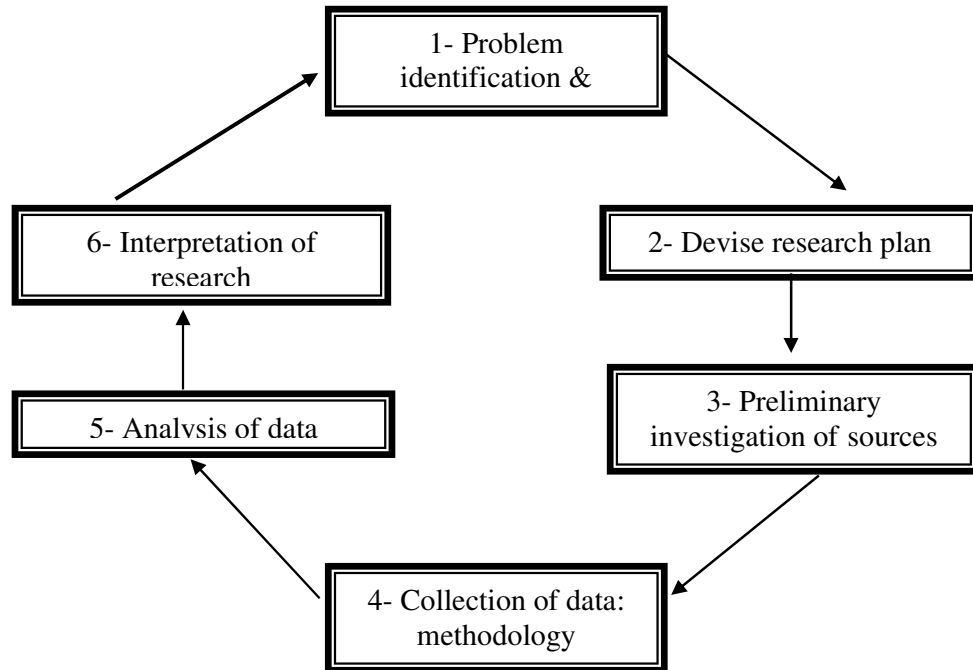
Destination names are brands. The names of tourist destinations are their basic brand indicators. However, these brand names carry the total image of the destination, not just its tourism characteristics. In addition, the branding of tourist destinations is more complex due to the fact that destinations themselves are more complex. An area or resort may contain many tourist products and facilities all serving different markets, often at the same time (Dickman, 1999).

A marketing contradiction is trying to establish one single brand image, which can communicate many different product attributes to several different markets at the same time. This has introduced the tourist destination branding dilemma. The dilemma for tourism authorities is how to respond to image perception, or more importantly, how to create an appropriate image, which is both appealing and truthful in content and style. Where the significant growth in the application of branding to places has been accompanied by a growing critical literature on place branding focusing on the social and political aspects related to urban planning (Bradley et al., 2002). There has been similar growth in the areas of marketing strategy and retail marketing (Kotler et al, 1999). In fact, destinations are visited by two types of tourist, the leisure tourist and the business tourist. In an increasingly competitive market therefore, destination marketers must seek a fuller understanding of the nature of images held by both individuals and organizations in order to build more favourable brand images and thereby enhance a destination's attractiveness and economic development. The information required is not only with regard to the

destination marketer's own destination, but also with regard to competing destinations, if positioning strategies are to be implemented successfully and limited budgets are to be used effectively (Hankinson, 2001).

3.7 Tourism Marketing Research

Marketing research is the systematic collection and analysis of data relating to the provision of products and services. These include market trends, consumer segments, buyer behaviour, product performance and consumers' responses to all aspects of marketing campaigns etc. The term marketing research is used in its broad sense of embracing consumer research. It includes all research-based information used in making marketing decisions, including database analysis and marketing information systems (Middleton, 2001). The lower the quality (or inadequacy) of information used for marketing decisions, the greater the risk of marketing failures, particularly in strongly competitive markets where information is needed to support decision making process. However, the main purposes of marketing research are to minimize the degree of uncertainty when making decisions, and to allow an organization to develop a market forecasting system based on market intelligence. In addition, there are other reasons, which are less obvious but important: To establish closer contact with customers in a formal way, and to allow an organization to focus attention on specific but crucial issues which require resource commitment. Thus, marketing research can be used to prepare a case at operational management level to support a project requiring resource commitment at board level (Lumsdon, 1997). Moreover, according to him, the marketing research process follows a series of logical steps as illustrated in figure (3.2).



Source: (Lumsdon, 1997)

Figure (3.2:) Key Steps in the Marketing Process

3.8 The Tourism Marketing Mix

There are four core variables (product, price, place and promotion), which reflect and express in practical terms the decisions of procedures concerning the tourism product for sale in two major issues, the context of the business environment and long-term strategic marketing objectives.

- Definition of Marketing Mix

According to Middleton (2001), the marketing mix may be defined as:

"The mixture of controllable marketing variables that the firm uses to pursue the sought level of sales in the target market".

Kotler (1988) added that marketing mix could be defined as:

"The set of marketing tools that the firm uses to pursue its marketing objectives in the target market".

As cited by Rafiq and Ahmed (1995), the essence of the marketing mix concept is, therefore, the idea of a set of controllable variables or a "tool kit" at the disposal of

marketing management, which can be used to influence customers. The disagreement in the literature is over what these controllable variables or tools are (Shapiro, 1985). Where Holloway and Robinson (1995) simplified the marketing mix to four elements, the familiar four Ps: product, price, promotion and place (i.e. distribution). Each of these elements would, in turn, have its own mix of ingredients. For example, the promotion element involves the mixing of various combinations of advertising, sales promotion, personal selling and public relations. However, as cited by Lumsdon (1997), the Ps have been found to be too limited in their application to services which fails to recognize a number of key factors that marketing managers in the service sector use to design their service output (Palmer, 1994). As cited by Panousi (2001), the three additional dimensions, which Booms and Bitner (1981) included, are

- **People:** The role of staff-customer interaction and service quality has become crucial to many organizations in the business of tourism. Hotels and airlines very often differentiate their offerings on this basis.
- **Physical evidence:** This refers to the nature of the design, aesthetics and ambience of surroundings of the service provision; for example, in hotels and restaurants, resort complexes etc.
- **Processes:** The processes underlying service provision are very tangible to the customer in tourism, as it is a high staff-customer contact business. Thus, processes such as hotel reception or travel agency booking systems are particularly pertinent.

Moreover, these marketing mix elements are included, in the marketing of services, but when it comes to applying the Ps in a tourism context, care must be taken. The characteristics of tourism are somewhat different to many of the products that have been used in the traditional market. Vignali (2001) stated that marketing strategies vary from one place to another. It involves customizing according to cultural, regional and national differences to serve specific target markets.

It is generally known that business travellers are different from non-business ones. As research and experience have shown that, the business traveller often has different needs and spending patterns from the non-business travellers, since it is believed that the

demand for travel service by the business traveller is inelastic with respect to price. While that the non-business traveller is elastic.

However, to standardize the marketing mix approach, the tourism marketing strategy needs to group countries by social, cultural, technological, political and economic similarities. Hence, for instance, the tourist is being sold an experience made up of many contributing components, rather than a tangible product. In addition, the product is not transported to the consumer, but it is vice versa. The costs of transporting products to market are an impediment for most procedures, but in the case of tourism the personal journey of the tourist may be a positive part of the trip and there may be an incentive to travel. Also, the producer may be unable to store the product for sale at a later time. For example, the lost opportunities of un- rented hotel room cannot be recouped on a subsequent night. The following section will examine the marketing mix elements separately.

- **Tourism Product**

- The Nature of the Tourism Product

According to Kotler (2003:302), the product could be defined as:

"A product is anything that can be offered to a market/or attention, acquisition, use, or consumption that might satisfy a need".

With the tourism product we are dealing with a service product that has specific characteristics that set the product apart from the more general goods sold in the market place. An understanding of the complexity of the service product concept is an essential prerequisite for successful marketing (Cooper et al, 1999). The tourism product is intangible, which means it cannot be easily evaluated or demonstrated in advance of its purchase. Moreover, a service cannot be stored. A tourist does not buy a bed or a beach or other attractions, but purchase night lodging in a hotel. Also, service products are often referred to being as inseparable. In other words, the product is often consumed and produced simultaneously (Kotler, 2000). Therefore, we can learn that tourism products are important in relation to the type of marketing they require. For instance, in Libya archaeological and culture or Sahara tourism has developed rapidly over the last few years, by targeting specific consumer segments, which resulted in high levels of demand.

Within this development, marketing strategy has often concentrated more on improving the product than on understanding the consumer, and the complexity of his/her decision making process (Cooper et al, 1999).

It is well known that the tourism product is a quite a complex one, since it can comprise a place such as the holiday destination, a service such as a tour operator's package, incorporating, the temporary use of an airline seat, hotel room and sometimes other facilities and on occasion, certain tangible products such as free flight bags, or a complimentary duty free gifts to encourage booking.

When consumers buy products, they are buying features of perceived standard of quality and style, which reflect the product's design. Typically, the product's image and value may be further enhanced through the use of a brand name, which helps the consumer to identify a product as of particular standard. Further enhancement may result from the product's packaging, which both protect the product and increase its attractiveness. The brand may also be indicative of reliable delivery and after sales service (Holloway, 1992).

- Product Planning and Development Policies

One of the major problems in marketing tourism attractions sites is product formulation in terms of deciding what the product actually is and how it should be sold. Any organization working in the tourism sector, in order to achieve its objectives should provide products and services that satisfy consumer needs, which may result in assuring themselves of repeat business. According to McIntosh and Goeldner (1990), product planning plays an important role in developing profitable, continuing business and has frequently been referred to as the five rights- planning to have the right product, at the right place, at the right time, at the right price, in the right quantities.

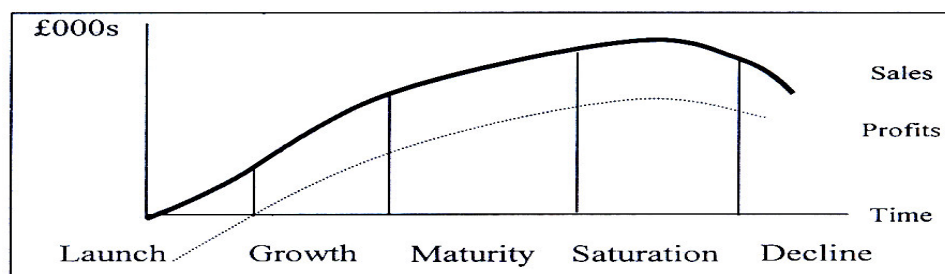
The theory of product or service development rests on the pivotal argument for new products or services. In reality, very few new products or services are new to the world. Most new products constitute modifications to existing products or service offerings, or a repackaging of core brands, such as Lufthansa's introduction of organic food for business class travel on North-Atlantic flights (Lumsdon, 1997). However, a few tourism offerings could be classified as concepts or innovations to the market. For example,

Libya possesses a variety of tourism assets, which are not entirely exploited. These assets could be introduced to the market as new fashionable attractions in a new tourism destination, which might be considered more appealing opportunity to the international tourist market. In this respect, most tourism organizations could be defined as imitative in this approach, which sometimes might referred to as a “follower strategy” in that they adopt good marketing ideas or policies that have worked well elsewhere.

○ The Product Life Cycle and Product Policy

As cited by Lumsdon (1997), the literature on the management of products has focused primarily on the concepts of the product life cycle and portfolio analysis (Wilson et al, 1992). The classical product life-cycle theory assumes that products have a limited life, during which they pass through a number of stages from introduction to decline. Product life cycle is an important concept within the overall product policy. Once the product or service has reached the market, it will be subject to a life-cycle and will eventually diminish from the market. In addition, the product life-cycle concept, to be more effective, must be made operational in such a way that it is possible to determine or predict unambiguously the exact position or stage of a tourism offering.

Holloway and Robinson (1995) pointed out that, although the exact duration of a product's life-cycle cannot be forecast, all products exhibit characteristic life-cycles which comprise; launch stage, growth stage, maturity stage and saturation decline stage. This typical life-cycle is illustrated in figure (3.3).



Source: (Holloway and Robinson, 1995)

Figure (3.3): The Product Life Cycle

The 'S' curve of this graph indicates that typically a product will experience slow initial sales after launch while it is still uncertain with accelerating sales as it becomes better

known and its reputation established. As the product becomes slowly familiar to customers, steady growth then will be achieved. However, as sales expand and face an increase in competition, so that at saturation point it may be fighting harder to retain its existing share of a stagnant market. If newer products are seen better than existing ones, sales will decline. As a result, at this point, the company must take some action, either to restore the fortunes of the product or kill it off. The following are the stages in more detail, which a product including tourism has to go through:

Launch Stage: New products are generally costly to produce and may have some problems during the launch period. Product quality is vital during this stage as failures during the trial of a product can lead to long-term buyer rejection, so at this stage of the product's life-cycle it requires high promotional expenditure, in order to create appropriate customer awareness of the product (Cannon 1986, Roberts 1993). So at this stage, sales tend to be slow, limited distribution exists, company losses occur (due to costs not yet recovered) and there will be a high percentage of failures.

Growth stage: At this stage, the product has been tested and some of the launching problems have been resolved. The product now is more reliable and more readily available. Consumers now start to see the benefits that can be gained by using the product. Sales start to increase and, the more accurate the plan is, the more profits will be accomplished. This is characterized by more competitors starting to enter the market with a similar product. Promotional expenditures remain high with emphasis on the brand or trade name (Holloway and Plant, 1988).

Maturity stage: Generally, this is the longest stage of the life cycle; the product becomes mature and well established in the market place. Highest profits are generated at this stage, with profits falling back thereafter, as sales decline. At this stage of the product's life cycle, many outlets are selling the same product or service and they are very competitive, especially in terms of price, while companies are trying hard to find new ways to survive in the market (McIntosh and Goeldner, 1990). Moreover, promotional activities are directed at reinforcement of the advertising or publicity message in order to encourage repetitive buys by the customers.

Saturation stage: At this stage, the number of competitors increases without further growth. Sales volume reaches its peak. The worldwide increase in tourism products and a new technology have lowered the price of travelling to make holidays available to almost everyone.

Decline stage: There are a number of factors such as competition, new product innovation, changes in customer preference or behaviour, which may bring the product or service to a decline stage. It is important to note that many products or services can stay at the saturation stage for years. At this stage, it is obvious that demand drops, promotional activities are lower, and there are usually smaller numbers of competitors. In addition, at this stage a decision should be taken whether to leave the market and concentrate resources in a new market or try to rejuvenate sales. As a concluding note, each product has its unique life cycle. In some cases, this pattern of growth-maturity-decline may be quite rapid while in other the product can sell at saturation level for a long period. Finally as sales peak and falter, the organization has to look at the merits for revitalizing the product, or allowing it to decline slowly, or killing it off and planning a replacement.

▪ **Tourism Product Price**

Pricing is one of the most important marketing decisions to take, since price fixes the terms of the voluntary exchange transaction between consumers willing to buy and producers wishing to sell (Middleton, 2001). It also strongly affects other elements of the marketing mix. Median (1989) stressed that tourism pricing is a very complex decision, as it involves the high degree of competition in certain tourism markets, and difficulties in accurately forecasting the level of demand. This section aims to show the significant and complex role that pricing plays in marketing-mix decisions and the growing power of customers over the pricing process.

○ Pricing Policy

Prices affect plans for the future direction of the business. An organization's price policy therefore appears in the marketing plan as an indication of the organization's objectives in setting prices (Holloway and Robinson, 1995). It must be pointed out that establishing the right pricing policy for the business is an important strategic decision in tourism

marketing. Pricing policy has to achieve a number of important roles. Firstly, an organization's activities should meet its customer's requirement and secondly, an organization should ensure that the costs of production, service and distribution are recovered. Thirdly, organizations should have enough profits to achieve their economic, social and environmental objectives. Whether or not a price policy is employed, any organization working in the tourism industry has to take into consideration the potential tourist's perceptual assessment. In deciding to buy a product or service, a consumer has to be willing to give up something to enjoy the satisfactions that the product offers. Indeed, the majority of tourists are looking for value when they buy a product or service. If a consumer accepts that the quality of a product is good, then he/she will be willing to make greater sacrifices in order to purchase that product. The point to be understood here is that the pricing policy ultimately helps to determine the success or failure of a product in the market place.

- Pricing Process

As cited by Vignali (2001), for each country there is a rigorous pricing process that is used to determine the price for that particular market. The process should consist of the following elements; selecting the price objective, determining demand, estimating costs, analyzing competitor costs, selecting a price method and selecting a final price (Vignali et al, 1999). Generally speaking, organizations have a choice of three strategies in pricing their products. Firstly, they can decide to sell their product at the market price, which is the same price that everyone else charges in the market. Selling at a price equal to competitors' tends to prevent price-cutting. In addition, customers are not driven away by price. Therefore, organizations compete on non-price terms.

Secondly, organizations may decide to price below the current market price. Adopting such a discount policy, companies are trying to create the reputation of having the lowest prices and underselling all competitors. Most clubs, resort complexes, and visitors' attractions, etc, when they are still new to the market, follow this pricing strategy in order to attract trial purchase and to establish strong word-of-mouth marketing. To be successful in this strategy, companies must make sure that demand is elastic. In other words, it is easy for a consumer to switch from one supplier to another or choose between very similar offerings from different competitors in the market.

The third approach is to charge above-market prices. A premium pricing strategy should be coupled with the best service in the industry and other features and amenities to make this higher price attractive. Such an approach emphasizes quality (which consumers may pay for), generates more revenue for promotion, and makes better service possible (McIntosh and Goeldner, 1990).

- Pricing in the Tourism Sector

Price is a critical variable in the tourism marketing mix. The right price must satisfy tourists and meet the profit objectives of tourism companies. Generally, price plays an important role as a primary signal of quality and accessibility for customers. When compared with similar purchases, their relative prices act as an indicator of what to expect from each product. For example, a good location of a hotel clearly increases the value of the lodging product to the customer. Thus, managers should charge a relatively constant premium room rate over competitors whose other attributes and qualities are similar but in an inferior location (Bull, 1994).

There are number of policies, which direct the pricing policy or strategy in the tourism sector. These factors come from product characteristics. Prices for tourism products have to take into account the complexity created by seasonality of demand and the inherent perishability of the product. Typically, the organization's main source of income to cover costs of production is revenue from sales. Revenue is a function of both prices charged and the volume of sales achieved. Likelihood that sales volume will decrease as price is raised. This is due to the fact that tourism industries have fixed capacity and high fixed costs but the direct cost of According to Law (1991), economic theory indicates the strong serving each customer is relatively small. The objective of pricing tactics is to match demand to supply, generating revenue to cover costs and to ensure profit long periods. Where, other researcher such as Witt et al (1991), argued that the crucial strength of pricing policy is the ability to differentiate on prices. Obviously, different prices should be charged to each group or individual, with a different price elasticity of demand. In order to achieve the price discrimination, the tourism organization needs to have a clear view of segmentation possibilities.

Furthermore, Gratton and Taylor (1992), stress that there is a major element about price discrimination, which needs to be taken into account in order to assess the achievement of the organization's strategic objectives. The leisure manager must figure out as precisely as possible, what effects changes in prices for different sub-markets have on the separate demands. Monitoring closely the exact effect of any price changes, results in identifying the nature of demand for the organization's product. Also conducting market research might be another method to establish the importance of price in the customer's decision-making process as well as the strength of demand at different times, activities, facilities etc. In addition, price discrimination might exist, when there are no adequate future markets, which is generally the case in tourism markets. Finally, it can be said that prices are not the only determining factor. It cannot be proved that cheap countries are the most attractive, despite the fact that the total selling price is one of the most important influences on the number of tourists, who choose a particular destination or country to visit in their holidays.

However, one of the most important elements in the tourism marketing-mix strategy is to decide on the right price approach that will satisfy both tourists and meet the objectives of the tourist organizations in the same time. Despite the pricing element representing the most significant one of the marketing mix in terms of profitability, pricing cannot be seen in isolation from the other elements. Pricing should be viewed as an integral part of the marketing-mix strategy and the inter-relationship with the other elements in the mix must be taken into consideration (Median, 1989).

- **Tourism Place (Distribution)**

The third element in the tourism marketing-mix is known as place or distribution. The distinct characteristics of the tourism product, have led to specific forms of distribution. As tourism, products cannot be transferred to other places, since customers have to come where the product is.

Middleton (2001), defined distribution as a tool which:

“Determines the number of prospective customers who are able to find convenient places and ways to gain information and convert their buying intentions into purchases “.

It should be pointed out that the distribution system is concerned with ensuring that the right product reaches the right customer. As competition increases in very vital markets, the importance of the distribution system grows equally as a successful distribution strategy will ensure that the product is visible and accessible in the market place and able to achieve a reasonable market share.

- The Objectives of the Distribution System

The aim of the distribution system is to establish a link between supply and demand, the tourism organization and the traveller or the tourist. The distribution system makes services and products available to customers. In fact, distribution in tourism differs from manufacturing or other sectors. The products and services in the tourism industry cannot be physically packaged and transported to the traveller and cannot be held in inventory for any other time. As a result, the customer becomes part of the production and consumption process (Kotler, 2003).

- Factors Determining Distribution Strategy

There are a number of factors, which need to be considered by any tourism organization, when deciding on which distribution strategy to follow in the market place. Some of these factors would be the locations or points of sale, cost of distribution, effectiveness in generating sales and the image of the organization. It is important for tourism organizations to notice that they should select their target markets. In selecting potential tourist markets, customers' living and working places are important indicators for the tourism organizations. Remembering that the distribution system should be efficient and positive, it pushes the organization's product through the distribution chain and creates the right image for product and organization (Foster, 1985).

- The Tourism Distribution System

Typically, the tourism distribution system is one component of the marketing-mix. In the tourism sector, the distribution decisions should be made as an integrated part of the overall marketing-mix. Once target markets have been selected and marketing objectives established, an appropriate marketing-mix is chosen. Clearly, the tourism distribution system chosen will have an effect over the other components of the marketing-mix. For

instance, the service offered might have to be adjusted to meet the specific needs of a travel intermediary. If an airplane seat is distributed through a tour operator, the schedules and other specification of the airplane may have to be adapted to meet the tour operator's requirements according to their marketing strategy.

Promotional activities of the tourism organizations also need to be adapted to suit the choice of distribution channels and intermediaries. Tour operators carry an inventory of airline company seats, hotel rooms and other tourism services. In most cases, they have a prior agreement with airlines and individual suppliers in destination areas and they are willing to share the costs of promoting the destination with the purpose of selling to the maximum number of tourists.

Moreover, the pricing of the supplier of tourism services is also influenced by the distribution decision. For instance, tour operators have choice. They can either distribute directly to the traveller or indirectly through a travel intermediary. They can buy in mass, such as 'blocked' reservations or airlines with hotels, as they are most likely to receive cheaper rates (Mill and Morrison, 1992).

In addition, as cited by Heung (2003), the Internet acts as a communication, transaction and distribution channel with benefits being gained by both travel suppliers and travellers. In the travel and tourism industry, travel products and services are observed to be well suited to Internet marketing due to their distinctive high-priced, high-involvement, intangible, heterogeneous, high-risk and well-differentiated characteristics (Burger, 1997). Also, the travel sector is rated among the top three product or service categories purchased via the Internet (Heichler, 1997., Yoffie, 1997).

- Tourism Distribution Channels

Travel Agents: Travel agents represent one of the most important elements of the tourism distribution channel as they act as an interface between the tourism industry and customers. Travel agencies can be divided into two different categories outgoing travel agencies and incoming travel agencies. The first deals with outbound- tourism and the other deals with inbound- tourism.

The importance of travel agencies differs from one country to another. In fact, they are an important part of the economy in developed countries and in particular the main tourist generators in some countries. In contrast with Europe, there is a vague distinction between incoming and outgoing travel agencies in the majority of the Southern European countries. It is very common for travel agencies to serve both inbound and outbound tourists (Buhalis, 1994). Whatever their role, they are in fact a mirror of the travelling customer's desire, wants, needs and attitudes, and play a significant role in influencing the tourist's travelling choice decision. According to Kotler (2003), travel agents are changing the way of making hotel reservations. They are turning away from a toll-free telephone number to booking hotel rooms directly through computer systems. These systems are now called global distribution systems (GDS) due to their global reach everywhere.

Tour Operators: Tour operators can be defined as "organizers," which means they act as an intermediary between the suppliers and travel agent, or the suppliers and the customer. From this, it can be observed that travel agencies are to a large degree dependent on the tour operator for their continued existence. In other words, any changes in the business arrangements between tour operator and travel agent, such as withdrawal of product, pricing policies, method of distribution will cause significant pressure on the travel agent. In developing a travelling package, a tour operator contracts with airlines and hotels for specified number of seats and rooms, receiving a quantity discount (Kotler, 2003). Where Middleton (2001) states that, this integrated product is usually called a tourist package or inclusive tour and, it can be defined as:

"A selected combination of individual elements of the travel and tourism product, marketed under a particular product or brand label, and sold at an inclusive price "

However, Developing countries like Libya need tour operators for several reasons. Initially, tour operators being in the travel business are equipped with first hand knowledge or expertise of the market situation. Secondly, tour operators increase occupancy rates and reduce promotional costs for tourism suppliers in tourist receiving countries. This might be a great utility for developing countries, which are short of funds to promote the country. Finally, tour operators organize package tours aimed at cutting the cost of travel and making holidays possible for different type of tourists. Admittedly,

new tourism destinations would never be considered or known by potential long-haul travellers in the absence of well-organized tour operators working in the tourism sector.

- **Tourism Promotion-Mix**

Promotion, or the marketing communications mix was seen by Kotler (1994) as consisting of five major tools: Advertising, direct marketing, sales promotion, public relations and publicity, and personal selling. Vignali, (2001), observed that globalization and the rapid changing business environment involves developing new marketing strategies to be used or adopted everywhere in the world. Global organizations employ standardized products, promotional campaigns, prices and distribution channels for all markets. In general the promotion-mix (i.e. marketing communications mix) is composed of five major elements namely; advertising, personal selling, public relations, sales promotions and other informing printed tools (catalogs, brochures, guides, etc) as follow:

- 1) Advertising:

As defined by Teare et al (1994) advertising is:

"A deliberate and pre-determined form of communication, where the company spends money to communicate with the market place in order to meet specific objectives. The objectives determine the type of communication needed and the means of reaching customer groups".

However, advertising tourism products and services is basically the same as for selling any other type of product except for some special features that are unique to the industry. The intangible nature of the tourism product, since the advertiser is basically selling an experience, might be a good example of those features. Advertising objectives can be classified by their aim: To inform or persuade (Kotler, 2003). In the mean time, and in order to attract actual and prospective customers, many forms of advertising can be employed, like newspapers, direct mail, television, magazine, radio, out-door advertising, directories and display material (Lumsdon, 1997). It is important that for the effectiveness of advertising, all advertising efforts and activities should be directed to the early stages of the consumer's decision-making process. This gains the attention of

prospective visitors and holds the attention. Hence, the message can be communicated and it makes a long-term positive impression on the potential consumer's mind. Furthermore, as advertising is undoubtedly the most expensive activity to attain and achieve an organization's strategic objectives, choosing the right media and time are vital for effective advertising (Middleton, 2001).

2) Personal Selling:

Middleton (2001), defines personal selling as:

"Direct contact between buyer and seller, face to face by telephone or through video-conferencing, personal selling is another of the core marketing communication tools".

According to Middleton (2001), personal selling is a two-way form of communication. It allows an interactive relationship to be developed between consumer and supplier. Personal selling in tourism industry usually takes place at the travel agencies or any sales office belonging to a tour operator. It has the advantages of direct contact and getting an immediate feedback from the customer. On the other hand, one can argue that, personal selling might not be practical in the tourism industry, since there are a large number of customers to be involved in the whole process.

3) Public Relations (PR):

According to Holloway and Robinson (1995) PR, has been defined as:

"a set of communications techniques, which are designed to create and maintain favourable relations between an organization and its public ".

In the tourism industry, it is necessary to have full information available to actual and prospective tourism places a special task in the PR function in official tourist organizations. Good practice indicates that effective PR starts with developing credibility across an organization as a whole before seeking to raise its visibility through media relations and other techniques. In addition, there are major elements needed for successful PR. These include, planned and budgeted programmes incorporating objectives, and public to be targeted, activities to be carried out and research and evaluation to assess performance against the objectives set (Middleton, 2001). However, PR activities in tourism range from familiarization tours for travel writers, editors and

travel agents, to receptions and presentations arranged by the offices of the official tourism organizations abroad; press releases to newspapers; and national weeks or contests organized by the destination country. Moreover, publicity for a tourism destination may also be obtained through media fiction such as movies. Therefore, public relations in the tourism industry can be used to educate the customers or travellers on the products and services available (particularly new ones) as well as improving their knowledge of other countries, images, people, cultures, resorts and destinations (Laws, 1991).

4) Sales Promotion

Sales promotion involves those activities other than advertising, personal selling and public relations that stimulate buyer purchase and the effectiveness of intermediaries. Sales promotion may be used to create awareness among all targeted customers or tourism travellers, but usually it is used for later stages of the buying process, in order to create interest and bring action to buy.

Sales promotion activities can be directed at not only the customers, but also the distribution networks. Kotler (2003) states that in destination promotion, these activities might be in the form of a price cut or sale offers, discount vouchers, competitions, prize draws, free meals, gifts etc. A further example of destination in terms of sales promotion is special merchandises. T-shirts, key chains and pens might generate word-of-mouth knowledge about the tourism destination.

5) Information Tools (Brochures, Catalogs, guides, etc):

In addition, to the above promotion or communication mix, there are other promotional activities. As tourism is an intangible product, printed communication (for instance brochures, guides or sales leaflets), are very important in the promotion of tourism products and services. Eccles (1995) pointed out that brochures and tourist's guides are the most widely used promotional method in the tourism industry. This is due to the intangible nature of the product and the customer can only sample the product through printed information. Largely, it is the designing, printing and distribution cost of tourism brochures that contains the largest part of most marketing budgets within the tourism

industry. Nevertheless, this is an essential expenditure, as the brochure or leaflets are the principal sales tools for tour operators and other tourism organizations.

However, since 1990, digital multimedia information technology such as web sites, CDs, video films, computerized images, video text, the Internet and enabled mobile phones, have been developed rapidly worldwide with low costing. As a result, online communications between a principal's stock of products and a customer's home television are confidently predicted to replace much of the role traditionally performed in tourism by printed materials. It has been estimated that, by the year 2010, almost every person in the developed world is likely to have access to the Internet (Briggs, 2001). For budget airlines, estimates of (60) per cent of bookings by Internet are cited in the travel trade press (Middleton, 2001). Nowadays, many business corporations use the Internet not only as a valuable marketing tool in providing a low-cost medium for advertising and promotion, but also as a channel of communication to generate additional sales (Heung, 2003).

3.9 Conclusion

From early discussion on market segmentation, it can be concluded that the tourism customers are heterogeneous and widely dispersed in their buying requirements or buying practices, and this is due to the fact that they can differ in one or more of the variables (motivators; image and attitudes; source of information; habits and customs etc). In other words, tourism is a product that corresponds to different needs, and these needs might be met by different kinds of tourist's supply chain. Countries planning to receive more tourists should identify those parts of the market that are the most attractive and that it could serve most effectively instead of competing everywhere. This calls for two steps. The first is market segmentation. In applying market segmentation techniques in the field of tourism, there are five strategic issues that should be considered: What is the target holidaymaker seeking in the particular vacation; the type of holiday that they are seeking; what knowledge customers have or lack about a specific destination; what, if any, negative image about the destination must be overcome; what assets the destination has versus competition that could be exploited to attract prospects. The second is target marketing, the act of evaluating and concentrating on those market segments that the tourist receiving countries can serve most effectively. This all calls for marketing

research to allow any organization working in the tourism sector to develop a marketing forecasting system based on market intelligence and enhance improve decision-making. Then the essential components of the marketing-mix in this chapter are introduced as the four Ps that have dominated marketing thinking for many years. These four Ps have been explained in this chapter as product, price, place and promotion respectively.

The tourism product in general is an amalgam of tangible and intangible elements centred on a specific activity at a specific destination. It comprises and combines the actual and perceived attractions of a destination, the facilities, and the destination's accessibility, from which the tourist buys a combination of activities and arrangements. Supplies of the tourism facilities or services provide only parts of the tourism product, and the co-ordination among them is very important.

Furthermore, product planning in tourism, as for any products or services, is concerned with the consideration of demand for products. It is also important that product planning should involve analyzing and assessing consumer requirements (existing and prospective) and identifying homogeneous groups of potential purchasers for specific tourist products.

Pricing is one of the most important elements in the tourism marketing mix. It signals to the customer the nature of service on offer. The right price should both satisfy tourist and meet the objectives of the tourism organizations. It is in this sense that the individual makes a judgment as to whether the price is in an acceptable range. Hence, pricing decisions are fundamental for the profitability of the tourism organization (travel agency, tour operator, etc) as it has immense impact on demand and sales volume. Although the pricing element is the most significant one of the marketing mix in terms of profitability, pricing cannot be seen in isolation from the other elements.

The distribution system in the tourism marketing mix is a major consideration since it is important that the tourism organizations' offering are made available and accessible to the target markets. Distribution decisions concern what distribution channel(s) should be used to give the customer the most effective access to the tourism products or services available at any tourism destination. This means that developing countries such Libya trying to open up their tourism markets, is mainly dependent on overseas tour operators to attract more tourists to visit new tourism destinations. Large tour operators however,

have incredible control on directing a considerable influx of tourists to a particular destination, by organizing package tours aimed at cutting the cost of travel and making holidays easier to be undertaken for travellers from different demographic backgrounds.

Marketing promotion is essentially a process of communicating with selected target markets. Most promotional activities require an investment of time and money with careful planning in order to achieve excellent results. The promotional tools selected will essentially be determined by target markets and marketing budget. In the tourism industry, the satisfaction of people to travel and see new places, depends, not on the efficiency of one producer but rather on the performance of numerous organizations of different kinds, with not always similar objectives, operating in different places and at different times. Therefore, to be successful in marketing a tourism destination, co-operation between public and private sectors became essential. Foremost, the right promotion-mix must be developed where each of these is used as needed. In fact, the tourism marketer has most control over advertising and sales promotion. Both of them are created, implemented, and paid for by the marketer, while personal selling and public relation are the opposite. The first one is done indirectly through travel agents and the second is produced through the media. It is, therefore, meaningful for the tourism marketer to sustain good relations with both the travel traders and the media. The next chapter will address the research methodology adopted to carry out this Study.

4. RESEARCH DESIGN AND METHODOLOGY

4.1 Introduction

Chapter One outlined the research's main aim and objectives, hypothesis, and the general study framework. This chapter will address these points in practical way by discussing the methodological issues starting in sections (4.2 to 4.3), which discuss the research philosophy, strategy and associated research method that been adopted and used. Section (4.4) will cover the issue of questionnaire design strategy and section (4.5) will highlight the personal interviews approach used. The following section (4.6) will cover the sampling techniques and the sample frames been adopted to carry out this study. Section (4.7) will then cover the approach to analysing data obtained from the questionnaire survey before reaching conclusion in section (4.8).

4.2 Research Philosophy

The philosophical stance that has been adopted by the researcher in order to achieve its main objectives was dictated primarily by the nature of the information required by the current study on tourism marketing in Libya. This nature was clear in many contextual issues unique to the project or the organisation affected by marketing activities. Whilst these are of extreme importance to the individual organisations in their strategic marketing process endeavours, they would not be constructive in the current study research. There has been no wish to gather information on the particular experiences of people or organisations but to harness the knowledge of individuals to answer some specific questions or issues regarding tourism-marketing strategies that were context-free in its approach. However, due to the exploratory nature of the current study and because opinion rather than facts will be sought the researcher tends to go towards the interpretivist end of the positivist perspective. Thus, appropriate research methods to use in these circumstances, to collect the opinions of different experts or people who have been involved in the process of tourism planning, marketing, and implementation, independent of context were:

- *In the positivist stance: Survey Research and Structured Interviewing*
- *In the interpretivist stance: Historical Analysis, Delphi, Intensive Interviewing, Expert Panel and Scenarios*

Of the research methods available within the interpretivist stance Delphi and Expert panels were considered at the initial stage of the research, both of these approaches being a method of obtaining and consolidating expert opinions (Meredith et al, 1989). These two research methods were rejected primarily for reason of practicality. Typically, these approaches require a large amount of administration and due the repeated rounds of inquiry needed by the current study; it will take some time to reach a conclusion. In the meanwhile, the historical review analysis method was also rejected since in most cases the data collection is limited to secondary data only. Moreover, even if primary data based only on interviews is obtained it may be incomplete where the human memory may not correctly recall past situations though, the method can be used to study organisations' performance relating to specific issues such as tourism-marketing. Therefore, the main research method that have been adopted and chosen for the current study is combined approach between the questionnaire survey and personal interviews. This method is considered to be more suited to answer the research hypothesis and to the collection of data (Oppenheim, 1992). This approach is more economical in terms of cost and time compare with the other methods suggested above. Reviewing the literature, the survey method seems to be widely used in research were relationships of variables are subject of investigation.

4.3 Research Design Strategy

The research design strategy that been adopted for the current study is a combination of multi data collection techniques or methods. Empirical data from secondary survey questionnaires available from tourism planning and marketing literature have been used to validate externally the finding of this research study, and offer possible experiences, explanations and comparisons between numbers of well-known organisations, which have already implemented tourism-marketing strategies in the recent years. The literature review that the researcher has managed to cover so far has played a major role in supporting the analysis of the primary research and provides a grounding of the research and focus needed. Also establishing sound basis for developing the research instrument for its primary data collection. After that, the identified key marketing issues within the tourism industry's literature helped in representing the structural elements that made up the practical part in this PhD thesis.

Moreover, several key tourism administrators from the Libyan General Board of Tourism (GBT) and other related tourism bodies were approached by the researcher in order to discuss the validity of the strategic framework developed in this study. The necessary modifications have been made to enhance reliability and effectiveness of the framework to help tourism organisations in Libya to improve their marketing action plans for the development of the tourism sector. The aim of the research design therefore, is to satisfy the research aim and objectives. Yin (2003) defines the research design as guiding the investigator in the process of collecting, analyzing and interpreting observation. The research design should demonstrate how the questions would be answered and how the researcher intends to cope with it (Yin, 2003).

Furthermore, the process of combining data collection techniques is known as “triangulation” (McGrath 1982), or the use of several kinds of method or data. By conducting a variety of data gathering methods, an addition of rigor, breadth and depth to research or study investigation takes place effectively within the research frame designed (Flick, 1992). This could be done by integrating rich detailed data resulted from questionnaire survey with the flexibility of getting information from using other research methods or techniques such as personal interviews, focus group historical and empirical data, pilot study, etc (Gummesson 1991, Yin 1994). However, the use of single research methodology approach advocated by a number of research authors, many supporting arguments are decidedly pragmatic such as time constraints, the need to limit scope of the study and so on. In addition and according Flick (1992), four types of triangulation approach or strategy are been identified:

- *Data triangulation: The use of a variety of data gathering methods in a study.*
- *Investigator triangulation: The use of a variety of researchers in a study.*
- *Theory triangulation: The use of multiple perspectives to interpret a single set of information data.*
- *Methodological triangulation: the use of multiple methods to study a single problem or phenomena.*

From these definitions, it can be concluded that both data and methodological triangulation are employed as the main research strategy method of this research.

4.4 The Survey Method Used

A survey is a primary data collection based on communication with a sample of individuals, (Alreck and Settle, 1985). The approach can be done either at a fixed point in time (cross sectional) or at varying points in time (longitudinal study) for comparative purposes. The advantage of the survey method is that if correctly designed and administered it can provide a quick, inexpensive, efficient, and accurate means of assessing information about a population. According to Alreck and Settle (1985) a large sample of respondents can provide the basis for statistical analysis and help to determine the degree of association between the dependent variable and a range of independent variables, and the analysis enable firm conclusions to be drawn from the survey data, and the finding to be generalized. A large sample also helps to raise the level of reliability and validity of the research (Alreck and Settle, 1985). In section (4.2), the basic reasons for choosing the survey approach were given, but no explanation was given for the type of survey method that was used. Three survey methods could have been used for this research as follows:

- a. Postal Survey (self-administered by the respondent).
- b. Face-to-Face (Personal) Interview Survey (self-administered personally or with a third party to administer the survey on behalf of the interviewer).
- c. Telephone Survey (interview via the telephone personally or via the use of a third party to administer the survey on behalf of the interviewer).

The telephone survey approach was rejected because the nature of the information requested cannot be obtained during a telephone conversation. Most of the questions require some thought and consideration that will not be possible during the telephone conversation; also, the length of the questionnaire made it an unpractical approach.

The postal survey approach was rejected because of the time and costs that would be involved in sending questionnaires to large sample of respondents (tourists).

The personal interview survey is chosen for two main reasons. One is that this method was comparatively economical and would allow for the collection of data from different types of tourists coming from many cultural backgrounds. The other, because it will allow the researcher to know respondents' expression about their real feelings and

experience with all aspects of tourism marketing activities in Libya.

- Questionnaire Design Approach

Designing a questionnaire is an important task since a properly designed questionnaire can elicit the precise data or information that the researcher wants. However, a poorly designed questionnaire will provide data that can be confusing, difficult to analyse and therefore of little value. In addition, a poorly designed questionnaire can be prone to systematic error (Oppenheim, 1992). This type of error can affect the validity and reliability of a survey. Reliability for the researcher means that the method of conducting a study and the results of it can be reproduced or replicated by other researchers (Oppenheim, 1992). Validity is the degree to which the survey measures what, and only what, it is supposed to measure (Oppenheim, 1992). Any systematic errors caused by a poorly worded question may cause many respondents to answer in a particular way. This will result in the survey being systematically pulled in a particular direction with the result of low validity. If the survey suffers from low validity then the results obtained will be questionable (Neuman, 1994). However, Neuman (1994) makes the point that perfect reliability and validity is virtually impossible to achieve, rather they are ideas to adopt. For him the maximization of reliability and validity should be pursued as far as possible.

The vast body of literature relating to questionnaire design was consulted during the process of designing (e.g. Oppenheim, 1992). The important aspects that were considered during the design stage of the questionnaire are as follows:

- ◇ The questions were clearly focused to elicit the response that are of relevant and interest to the research without collecting extraneous information.

- ◇ Particular care was taken to ensure that the questions are clear and unambiguous. The questions were worded so as to have common meaning for every body completing the questionnaire. Especial consideration and care were taken to not advocate any position (loading), and statements containing a combination of questions (double barrel) were avoided whenever possible.

- ◇ The questions were tested prior to the pilot stage to estimate the time required to answer and to ensure that all respondents are competent to answer.

- Pilot Testing of the Questionnaire

The purpose of the pilot testing is to refine the questionnaire, and ensure that the respondents will face no problems in answering the questions and that there will be no difficulties in capturing the needed data. In addition, it allows assessment of the question's validity, reliability and enables investigative questions to be answered for preliminary analysis (Finn et al, 2000 and Saunders et al, 2003). Despite the researcher's experience in the tourism sector (from being a senior employee in Libyan tourism sector for many years), the personal interviews survey questionnaires directed to the international tourists visiting Libya were pre-tested among several local travel agents and guides located in Tripoli. This approach was very useful for two main reasons, first, to obtain the highest possible response rate and minimise the difficulties in answering the questions. Second, to estimate the time required to respond and to ensure understanding. The time required was found to be from 20 to 30 minutes. In addition, and as a positive result of pilot testing, little confusion some questions was discovered and corrected, wording was then improved and new questions were added.

Moreover, it was discovered that due to the multinational aspect of the international tourist survey sample, the need for questionnaire translation to multi-languages was essential in order to capture more relevant and precise data. As a result, the questionnaire was translated to four different languages: English, French, German, and Italian. Back-translation (i.e. source questionnaire to target questionnaire to source questionnaire) approach was employed as a translation technique for questionnaires. The major advantages of such a translation technique is that it is likely to discover most problems such as those which emerge when a direct translation technique is adopted, which may lead to many discrepancies (including those relating to meaning) between source and target questionnaire (Usunier, 1998).

Furthermore, prior to the commencement of the personal interview questionnaire, contacts had been made with senior staff members in various tourism organisations in Libya, with whom the researcher still retained a good relationship from years. The researcher engaged these contacts to discuss the questions, to make sure that all the necessary parts were covered, and to find out any other shortcomings. This helps to

establish content validity and enable the researcher to make necessary amendments before the final stage of questionnaire design and layout (Mitchell, 1996).

- Questionnaire Implementation

Information gathered from the secondary source data was used in preparation for the field research questionnaires, which was the basis for the research analysis and interpretation. When the questionnaires had been tested, reviewed, revised and proven valid and reliable, in order to facilitate the research task, four different questionnaires were formulated. Examples of these questionnaires are given in Appendices (A and B). The guided questionnaires used for the international tourists visiting Libya, and the personal interviews with the senior managers working in the tourism sector covered the main areas of interest to achieve the research aim and objectives.

- Questionnaire Delivery and Collection

The international tourists' questionnaire survey was carried out over three months between October and December 2007. The questionnaires were translated into four different languages: English, French, Italian and German, for the purpose of capturing more accurate and typical responses. A total of (322 respondents) were chosen as the survey sample. Of these questionnaires, 40 were incomplete and therefore were discarded, where 282 usable questionnaires were finally entered into the research analysis and interpretation stage, representing a response rate of (87.6 per cent). However, the main questionnaire survey was directed at international tourists visiting Libya in various tourist attraction areas such as; hotels, tourism sites and the airport were targeted. Its aim was to research what image and expectations international tourists have about Libya and to find out the degree of satisfaction with Libya as a new tourism destination. This questionnaire was composed of four parts.

The first part aimed to examine the attitudes of international tourists towards Libya as a tourist destination and the marketing activities and promotional efforts, which have been undertaken by the Libyan tourism bodies (both public and private) to improve such attitudes. In addition, the travel motivations of international tourists to visit Libya were addressed. The second part of the questionnaire then was specifically designed to measure international tourists' perceived satisfaction or dissatisfaction with their holiday

in Libya. Tourists' satisfaction and dissatisfaction can be examined in various aspects, such as accommodation, local services etc.

The third part of the questionnaire was concerned with tourists' demographic or status. Therefore, set of questions were designed to identify their marital status, sex, age and current job occupation. This aimed to identify the type of market segments that Libya's tourism organisations are currently targeting .Finally; a few questions were introduced to assess overall satisfaction or dissatisfaction with Libya as a new tourism destination and obtain comments or suggestions about improving the Libyan touristic products and services experienced by the tourist once he or she visits the country.

4.5. The Personal Interviews Method Used

Personal interviews were conducted in this research with key tourism administrators in Libya during months of February and March in 2008 with various tourism bodies working in the sector. The majority of the interviewees were on the board of their organisations (first one was the chairperson of the GBT, second was the manager of tourism services department and the third one was head of tourism marketing & promotion department at the GBT). Where the four interviews conducted with PTBs were with two general managers and two managers of the tourism services departments. The objectives such approach were to understand how they perceive international tourism and the country's tourism potential to generate economic diversification, social-economic benefits and evaluate the tourism related problems and potential, also to examine to what extent international tourism has affected their revenue generally. In addition, an objective was to assess the level of marketing activities and tourism promotional strategy or planning undertaken by those various tourism bodies. All interviews were conducted in Arabic language except one interview was done in English. Conducting such interviews was a crucial instrument to understand fully their real feelings, as a result understand the research problem. In addition, contribute to the validity of the research hypotheses and thus, achieve its objectives.

However, the first step began with professional administrators at Tourism Boards of whom approached by telephone to make an appointment for interviews. A guided

questionnaire with a view to asking their perception about how they view tourism development in the country as an enhancement to the national economy and whether or not the marketing activities currently undertaken are sufficient and efficient to serve the development of international tourism in the country. Due to time constraints, it was difficult to increase the sample size of tourism administrators at GBT within the limited period designed for such research in Libya. Second, the interviews were conducted with selected tourism related administrators at PTBs. The guided (semi-structured) questionnaire is been used to assist interviewees and clarification was made in order to obtain information about the contribution of international tourism in their organisations total revenue and how this had reflected their view in terms of tourism-marketing activities, promotional efforts and some other related aspects. Furthermore, the interview was conducted with close co-ordination and in a confidential environment to achieve reliable information about the subject matter of the research study. Face-to-face interviews established better understanding and have been found to be appropriate for revealing information about feelings and emotion regarding different aspects of the tourism sector. This established a high degree of confidence between interviewees and interviewer, which enabled the author to examine the validity of the research questionnaires.

4.6 Sample Selection and Size Frame

The concept of sampling simply means taking part of the population to represent the whole population (Neuman, 1994). The main reason for sampling is economy in cost, time and personnel. Samples are required to be representative of the population, that is, they contain the same degree of variety of the population, if they are to provide useful estimates of the relevant characteristics of that population (Babbie, 1990). If sampling is carried out properly it lets the researcher collect data about the variables from a small set of cases, but generalise accurately to all cases, (Neuman, 1994). There are two approaches to sampling: probability and non-probability sampling. Figure (4.1), shows the different type of probability and non-probability sampling.

However, with probability sampling every element in the population has known non- zero probability of selection. The best-known form of probability sampling is the

simple random form of sampling; with random sampling, each member of the population has an equal probability of being selected. Where, with non-probability sampling, the probability of any particular member of the population being chosen is unknown. The selection is arbitrary and depends largely on the personal judgment of the researcher. It should be noted that there are no appropriate statistical techniques for measuring random sampling error for non-probability samples. Thus, projecting the data beyond the sample may be statistically inappropriate. For the researcher in this thesis on studying the effectiveness of tourism- marketing strategies in Libya, the ideal is to go for a random sampling with relatively large sample size but simple. Where, the reality is that the researcher was faced with a number of constraints or problems namely financing, time and full administrative support. These constraints or problems make it very difficult and expensive to get a truly random sample.

Sampling Techniques	<u>Definition</u>	Comments
1. Simple	Select people based on true random procedure	Laborious and time consuming but provides most reliable sample procedure
2. Systematic	Select every nth person (quasi-random)	Independent of researcher preference or prejudices
3. Stratified	Randomly selected people in predetermined groups	Laborious and time consuming
4. Cluster	Take multistage random sample in each of several levels	Laborious and time consuming
5. Haphazard	Select anyone who is convenient	The result is only applicable to the sample studied
6. Quota	Select anyone in predetermined group	Conclusions drawn are limited to the sample studied but tentative implications for others may be suggested
7. Purposive	Select any one in hard to find target group- using expert judgment	Only tentative generalisations may be made
8. Snowball	Select people connected to each other	

Source: (Neuman, 1994)

Figure (4.1): Sampling Techniques

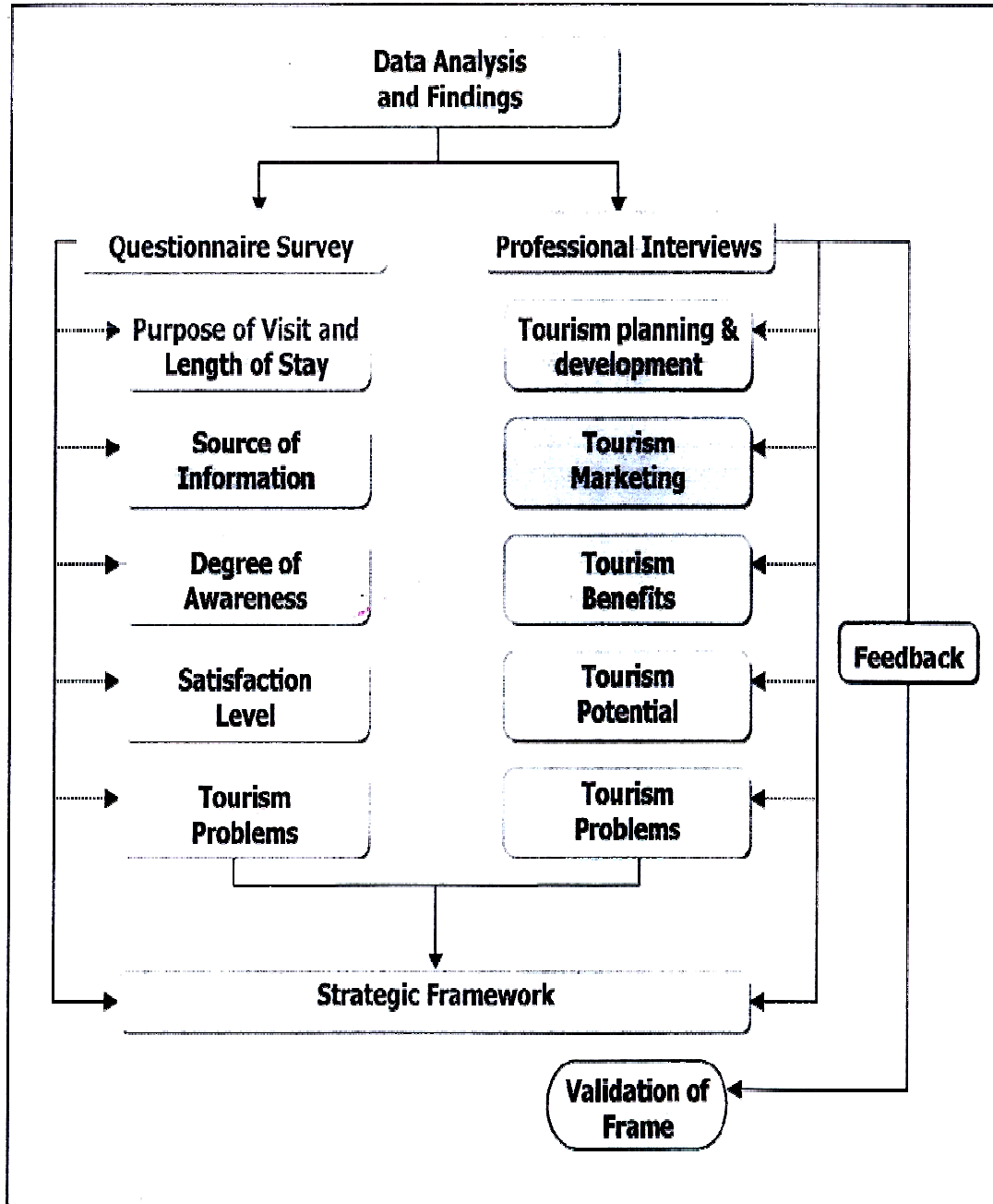
4.7. Data Analysis Approach

After data have been obtained through questionnaires and personal interviews, the need to be collected, once the data are ready for analysis, the researcher is ready to test the research hypotheses already developed for the study (Sekaran, 2000). The analysis of research data forms the major part of the study. In order to address the initial propositions of the study, different types of methods can be found including examining, categorizing, tabulating, or the otherwise recombining the evidence. The definition of analytical strategy determines the limits of data collection and dissemination of results. In this research study on tourism marketing, the data obtained was both qualitative and quantitative in its methodological nature. Therefore, the Microsoft (Ms Excel) and SPSS (Statistical Package for Social Science) are used for data entry and analysis. The Ms Excel proved to be very useful in creating the indexes for the variables. The questionnaire consisted almost entirely of closed pre-coded questions and some attitude scales. Some demographic questions were not pre-coded like the gender, age, etc. For such questions, appropriate grouping was decided and given numerical values. All the categories have been assigned numerical values. The completed responses from TOCs were then checked visually for any obvious entry errors. For instance; one company submitted three responses from different managers, which were identical, this was excluded from the analysis. Internal consistency checks were also conducted which revealed further errors in the entry and in the responses. Most of the research responses were of useable state.

4.8. Conclusion

Different types of studies have been classified in terms of; the purpose of the research, the process applied the logic behind, and the outcomes of the research. Where the outcome refers to whether the researcher is trying to solve a particular problem or make a general contribution to knowledge. This research through its various methods used, has provided a great deal of detailed information on the discipline of tourism marketing with especial focus on the Libyan case. The research therefore, will provide a proposal for a strategic framework, which then will help in addressing the tourism issues and solutions for them in order to improve the Libyan tourism sector. The next chapter will cover the more detailed data analysis and findings, where the overall process of such

approach is represented in figure (4.2).



Source: Designed by the Researcher

Figure (4.2): Research Process of Data Analysis and Findings

5. RESEARCH ANALYSIS AND FINDINGS

5.1 Introduction

The international tourists' questionnaire survey was conducted for almost three months during the period of October to December 2007. A total of 322 people were chosen as the survey sample. Frothy questionnaires were incomplete and therefore were discarded, where a total of 282 usable questionnaires were finally entered into the analysis, representing a total response rate of (87.6 %). The researcher also approached key tourism administrators (professionals) from the Libyan GBT and PTBs during the months of (February to March 2008) in order to conduct personal (face-to-face) interviews. However, the main objectives of this chapter are to test the research hypotheses, to analyse the findings in terms of the respondents' perceptions, awareness, knowledge and satisfaction, and to investigate different aspects or issues surrounding tourism marketing in Libya.

5.2 International Tourists' Survey

- Number of Visits to Libya

The findings reveal in table (5.1) that the majority of tourists in the sample were visiting Libya for the first time. This may be due to particular reasons such as Libya is a newly fashionable destination, only recently open to tourists with little to do there, despite the variety of attractions that the country possesses. In other words, Libya is considered to be one of the most attractive tourism destination in the region as well as to international tourist markets. As a result, many tourists will be encouraged to visit such fashionable destination in the North African region.

Table (5.1): Number of Visits to Libya during the Last Five Years

Visits to Libya	Number
1	254
2	8
3	7
4	4
5	3
6	6
Number of total valid responses = 282	

However, due to the lack of tourism facilities and services at the Libyan tourism areas and the lack of knowledge and awareness that international tourists have about the country, tourists do not have much interest to visit and see thus, there is no need for them to come back again. On the other hand, only 10 per cent of the respondents were repeating their visits to Libya. This may be because of business or they have experienced the attractions and facilities of the country.

▪ Purpose of Visits

In order to determine the purpose of tourists' visit to Libya, respondents were asked to specify the purpose(s) for their holiday. As can be noted from table (5.2), the top three purposes were Vacation/holiday 65%, visiting historical places 52% and the desert 32%. They were ranked as number one, two and three respectively. At the other ends of the table: Sunny beaches 1% and value for money 2% were considered the least important purposes for visiting Libya.

Table (5.2) Purpose of tourists' visits to Libya

Purpose of visit	Number
Vacation/holiday	184
Visiting historical places	147
Desert	89
Culture	50
Business	39
Adventure	17
Interesting and friendly people	15
Good weather	12
Appealing local food (Cuisine)	10
Value for money	5
Sunny beaches	3
Number of total valid responses = 282 (Responses exceed 100% due to multiple responses)	

As a result, it can be observed that a large number of tourists are attracted by the country's historical and desert attractions. On the other hand, it can be noted that there is a lack of tourism marketing promotions for facilities like beaches, which was ranked the least important among the other purposes of visiting the country, while in other tourist countries this is considered as a significant tourist attraction for tourists as well as a valuable source for foreign exchange.

- **Tourists' Length of Stay**

International tourists were invited to indicate their length of stay in Libya. A breakdown of the answers received is shown in figure (5.1), and from the chart, it can be observed that a two-week stay was the most favourite for tourists visiting the country, since the highest proportion of them (53%) spent this period in Libya. Where, less than one-week period came second since (30%) of participants indicated that they stayed this period.



Number of total valid responses = 282

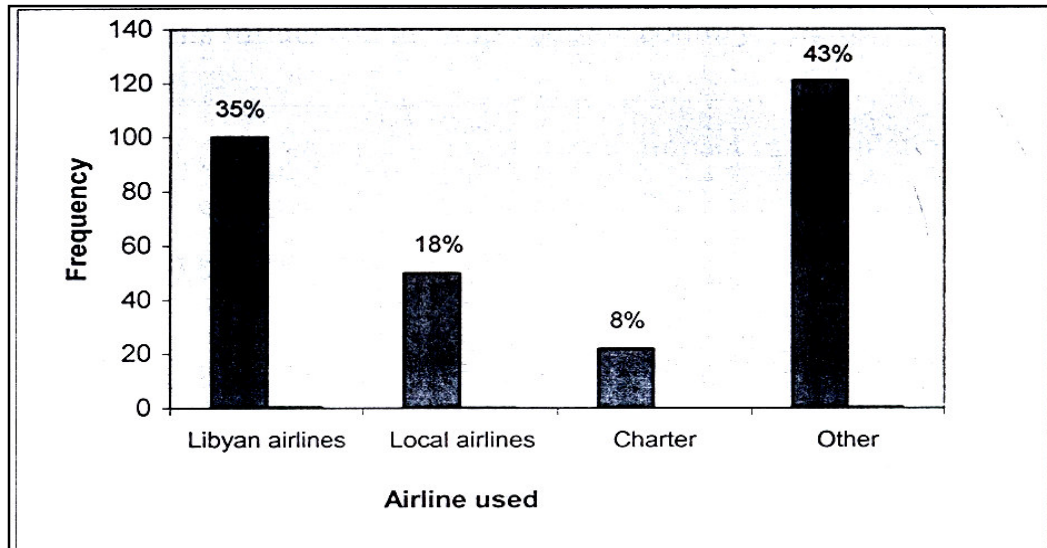
Figure (5.1): Tourists' length of stay in Libya

From the above finding information, it can be understood that the tourist's length of stay is quite short comparing to other destinations. Therefore, different variety of tourism attractive programmes and marketing promotions should be organized so the visitors will keep busy with their time and spend more. In addition, to maintain arrivals, more efforts that are active should be made to increase the length of each visitor's stay in the country, expend opportunities for visitors to consume, and encourage them to spend more money in the country. Therefore, it is necessary to develop special-interest attractions such as, conventions and conferences, business travels and intensive tours, which may help visitors to stay longer. Spending can also be encouraged through various aspects, such as tax-free shopping, the provision of proper shopping facilities for incoming tourists, and the development of unique souvenirs and gifts. Moreover, touristic product's selling prices for tourists should be carefully considered valued more for money and competitive with other tourism destinations in the region which, may encourage actual tourists to spent more time in the country as well as attracting new marketing segments in the international tourism market.

○ Tourists' Use of Airlines for Travelling to Libya

Tourists were asked to identify the airlines they used for travelling to Libya. From figure (5.2), it can be seen clearly that many of the tourists use airlines other than Libyan airlines for travelling to Libya. As the findings indicate, (43%) of respondents indicated

the use of such airlines. Next, came Libyan airlines with (35%) followed by local airlines (18%) and charter flights by tour operators with only (8%).



Number of total valid responses = 282
 Responses exceed 100% due to multiple responses

Figure (5.2): Tourists' Use of Airlines for Travelling to Libya

From the findings of illustrated above (figure 5.2), the following comments can be drawn: tourists extensively used other airlines and Libyan airlines, although the flight fares to Libya were generally high. The share of charter flights by tour operators was small compared with other airlines. This demonstrated that inclusive tour excursion fares, which are usually made by tour operators, are not available. In additions, as the demand for Libya as a new tourism destination increases, the competition among tourist carriers and airline companies becomes stiffer. Ultimately, this will have its impact on the flight fares to and from the country. Therefore, the introduction of charter flights could help Libya to offer competitive airfares and to attract more tourists.

○ Source of Travel Information

Respondents were asked to denote what source(s) of travel information influenced them to visit the country. Seven sources were then suggested to them by the questionnaire, and the opportunity to add others was given. Table (5.3) depicts the sources of information that led tourists to be interested in visiting Libya. In fact, recommendations from travel agencies received the highest response with (54 %).

Where, recommendations of friends and relatives were the second factor contributing to the arrivals of tourist in Libyan with (27%) of them reported that such suggestions influenced them to visit the country. Published sources (18%) seemed to create better impact in stimulating the interest to visit Libya than Web sites and other sources (9%), previous experience (7%) or newspaper/travel magazines (6%). Moreover, as can be inferred from table (5.3), only (1%) of respondents indicated that they have heard about Libya as a tourist destination on the radio and television, which are considered as some of the most effective promotional tools.

Table (5.3): Source of Travel Information

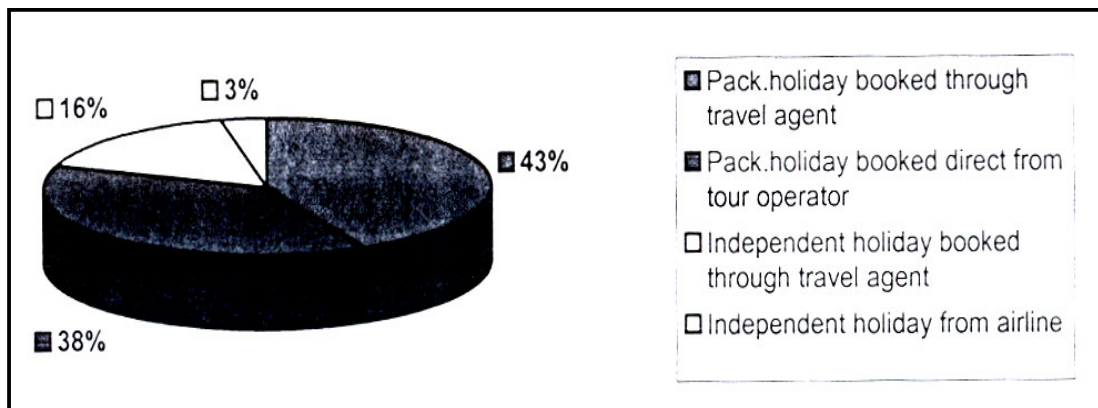
Source of information	Number
Travel agencies	184
Recommended by friends and relatives	147
Published sources (e.g. brochures)	89
Web sites	50
Other sources	39
Previous experience	17
Newspapers/travel magazines	15
Radio/TV advertising	12
Number of total valid responses = 282	
(Responses exceed 100% due to multiple responses)	

As has been mentioned in (Chapter three), the primary aim for promotion programmes is to create awareness of a destination and its attractions and to influence the travel planning process at an early stage by motivating potential tourists to decide to make supplementary enquiries about costs, booking etc. Therefore, it might be suggested that effective and efficient tourism marketing strategies should be developed by Libya's GBT and local TOC in order to generate a favourable image and desire for tourists to visit the country as well as supporting the initial motives of tourists.

- **Travel Arrangements to Visit Libya**

In terms of travel arrangements, figure (5.3) illustrate that travel agents and tour operators played a major role by handling the booking of (43%) and (38%) respectively. Where

independent holiday-makers only accounted for (16%) of all the holidays to Libya followed by only (3%) independent holidays sold by the airlines. This indicated that the total percentage of independent holidays is relatively small compared to package holidays used by the traveller. However, in other tourism destinations around the world this particular type of holiday represents a high rate of total arrivals. It is a significant source of foreign exchange revenues, as it contributes heavily to increasing tourist's total expenditure and his/her length of stay into the tourism destination.



Number of total valid responses=282

Figure (5.3) Travel Arrangements to Visit Libya

Moreover, in Libya, the low percentage of independent holiday might be due to several reasons: Libya opened its doors to tourists from Europe and other parts of the world only recently. Thus, tourists do not have adequate knowledge and experience about the tourism facilities and attractions of the country. This means that they cannot travel independently around in the country.

▪ **Tourists' Satisfaction Rating of Accommodation**

According to McIntosh and Goeldner (1990), the accommodation service is considered to be an important component of the tourism products. Therefore, if the service offerings were insufficient or ineffective, the tourist may not have achieved satisfaction with the visit to the tourism destination. However, In order to find tourists' satisfaction with the accommodation services in Libya, respondents were asked to rate their accommodation in terms of various aspects as shown in table (5.4) using a five-point scale, ranging from "very dissatisfied" to "very satisfied".

In addition, a separate column of "do not know" was attached to the scale in order to judge the tourists' satisfaction with each factor. As shown in table (5.4) responses were ranked in order according to the mean value. The higher the mean value, the better the factor, which was considered by respondents. Table (5.4) summarises the overall pattern of tourists' responses. Tourists were particularly happy with the friendliness of staff, efficiency of service and quality of food and drink. On the other hand, tourists were not as happy with the overall value for money, which indicates that room and the meal costs are high. This might be due to inadequate discount for tourists, high exchange rate generally, no cheaper meals prepared specifically for tourists and lack of cheaper accommodation suitable for those who have a limited expenditure budget.

Table (5.4) Tourists' Satisfaction Rating of Accommodation in Libya

Elements of perception	Very dissatisfied	Dis-satisfied	As expected	Satisfied	Very satisfied	Do not know	Total	Mean value
Friendless of staff	3	9	29	70	135	11	257	4.3
Efficiency of services	14	25	51	85	55	27	257	3.6
Quality of food and drink	17	27	56	81	58	18	257	3.6
Overall value for money	19	20	40	62	39	77	257	3.5
Cleanliness	63	27	50	56	50	11	257	3.0
entertainment	39	27	29	28	17	117	257	2.7

Source: Field Study

The higher the mean value, the more important the tourist considered the reason.

(Very dissatisfied = 1; Dissatisfied = 2; As expected = 3; Satisfied = 4; Very satisfied = 5; Do not know = 0)

However, as a result, the price should be carefully considered, as it sends a significant signal of quality and accessibility for customers. Therefore, pricing policy should determine the various aspects such as, meeting customer's requirements and expectations of "value-for-money", ensuring that the cost of services is covered in order to make enough profit, and finally to put into consideration market and competitors' prices. Moreover, cleanliness was another aspect, which was criticised by respondents. In

addition, entertainment was ranked the least among other aspects, which emphasizes that there is little or no entertainment or cultural activities organized for tourists.

- Tourists' Satisfaction Rating of Tourism Attractions

Respondents were asked to indicate their views on the attractiveness of Libya as a new tourism destination. Then, a five-point scale was used, ranging from "very dissatisfied" to "very satisfied". Additionally, a separate column "do not know" was added to the scale for assessing precisely the level of attractiveness of attractions experienced by the international tourists visiting the country. Table (5.5) shows the answers received from the questionnaire survey's respondents. The higher the mean value, the more desired tourists considered the tourism attraction.

Table (5.5): Tourists' Satisfaction Rating of Tourism Attractions in Libya

Elements of perception	Very dissatisfied	Dis-satisfied	As expected	Satisfied	Very satisfied	Do not know	Total	Mean value
Historical interests	0	6	19	60	174	4	263	4.6
City tour	11	12	20	23	27	170	263	3.4
Cultural show	11	11	21	23	18	179	263	3.3
Beach resorts	18	15	23	18	18	171	263	3.0
Water sport facilities	21	9	3	3	8	219	263	2.3
Nigh life	49	15	9	4	8	178	263	2.0

Source: field Study

The higher the mean value, the more desired tourists considered the tourism attraction.

(Very dissatisfied=1; Dissatisfied=2; As expected =3; Satisfied=4; Very satisfied=5; Do not know=0)

Referring to Table (5.5), despite the shortage of facilities provided at the Libya historical sites, respondents were mostly satisfied with Libya's historical assets, its city tour and cultural shows. These attractions represent the major areas in the country to attract international tourists. On the other hand, respondents were unhappy with beach resorts, water sport facilities and nightlife. From the above table, it can be observed that, despite the extensive and varied range of tourism resources that Libya possesses, there are only a few, which are offered currently to the tourism generating markets. This might be due to

lack of tourist resorts at the seaside with the three major elements renowned for attracting tourists, which are; the Sun, the Sea and the Sandy Beaches). In addition, beach tourism including water sports, diving and games is currently unexploited. Water sports play a significant role in attracting tourists and it is considered as a complementary activity to those who wish to spend their holidays by the seaside. Nightlife can be a valuable opportunity to encourage tourists to spend more money in the country. Besides, nightlife may generate the opportunity to show the unique face of the country's culture image to the outside world.

- Tourists Satisfaction Rating of Local Services

Local services play an important role in attracting tourists to visit a tourist destination since; if tourists are satisfied with the efficiency, effectiveness and quality level of services provided they will be motivated to stay longer in the country, as their major aim is to seek relaxation. In order to assess the extent to which tourists were satisfied with local services in Libya, a number of relative services and facilities were considered (see table 5.6 below). These were directed to respondents, who were requested to rate them using a five-point scale ranging from "very dissatisfied" to "very satisfied". Moreover, a separate label "do not know" was added to the scale for those who may not have had the opportunity to experience such services and facilities within the Libya tourism sector.

Table (5.6): Tourists' Satisfaction Rating of Local Services in Libya

Elements of perception	Very dissatisfied	Dis-satisfied	As expected	Satisfied	Very satisfied	Do not know	Total	Mean value
Attitude of local people	6	7	34	77	101	47	272	4.2
Personal security	8	6	40	63	104	51	272	4.1
Quality of travelling roads	10	24	63	86	66	23	272	3.7
Desert facilities	9	9	20	30	26	178	272	3.6
Restaurants	31	31	68	62	41	39	272	3.2
Facilities offered at tourist centres	18	23	28	30	26	147	272	3.2
Airport/border services (Customs)	44	31	47	45	36	69	272	3.0
Airport/border services (Immigration)	53	37	39	50	34	59	272	2.9
Communication services	56	34	40	32	12	98	272	2.5
Hygiene and sanitation	83	66	56	30	9	28	272	2.2

Source: Field Study

The higher the mean value, the more important the tourist considered the reason.

(Very dissatisfied = 1; Dissatisfied = 2; expected = 3; Satisfied = 4; Very satisfied = 5; Do not know = 0)

Referring to table (5.6), respondents were shown to be more satisfied with the attitude of the local people, and personal security, while they were quite satisfied with the quality of roads and desert facilities. On the other hand, respondents were particularly dissatisfied with hygiene and sanitation, and communication services. However, Most of the respondents seemed to be satisfied with local people. In fact, they praised the Libyan

people for their hospitality and friendliness; this in turn proves that the Libyan community generally understand the concept of tourism. While demonstrates that most local people, particularly those who work in tourism related services, are highly aware of the international tourism development role in the community's well-being. While regarding the personal security of tourists in Libya, the research findings showed that the majority of respondents felt secure during their stay in Libya. This will prove the fact that Libya is a peaceful place for international tourists and change the negative perception and image that been held by some of the world tourism generating markets over the last few years. Moreover, respondents were quite satisfied with the quality of roads, as considered one of the important components of the tourist product of any destination country, since it gives accessibility to tourist attractions and facilities. On the other hand, a few of the respondents complained that most of the roads are lacking of signposting that are in a European language rather than Arabic language only.

In addition, respondents were also quite satisfied with desert facilities, regarded as the major attraction of Libya's touristic products that appealed to many of the respondents. A few of the participants and their local tour guides complained about the inadequate or poor toilet facilities at the tourism areas in the Southern Sahara of Libya, and some were unhappy about inadequate and unsuitable accommodation close by the desert tourist attractions. Where, with according restaurants, the findings indicate that the respondents were quite satisfied with the services provided. However, there are a few problems, which should be considered. Restaurants should be provided with more skilled personnel in order to improve the speed and the quality of service provided; more control is required on hygiene by being rigid on the applicability of the regulations regarding this issue, and increasing the number of good quality restaurants in the tourist places, which currently are lacking the ability to cope with the number of arrivals. In terms of facilities at tourist centres, some respondents appeared to be unhappy with the service offered. It is the fact that there is a lack of tourist information centres in the tourism attractions areas generally, which make it difficult particularly for independent travellers to move around with out feeling lost their. There are also inadequate maps and information signposting, especially in the tourism areas.

Furthermore, with regard to airport or border immigration and customs, some of the respondents were not happy with the service at the border in terms of delay and entrance procedures. Therefore, tourism facilities at the airport should be improved. As a result, the people who are working at the airport and the border would have to be provided with some training and knowledge about the utilisation that will be achieved from tourism to the society. The purpose of this is to improve their attitude towards international tourists and be more friendly, bearing in mind that the first impression about the country is gained from them. Finally, respondents generally appeared to be dissatisfied with hygiene and sanitation in Libya. It is the fact that in some places in the country, the standard of sanitation needs to be improved not just for visitors but also for residents. This should be fully acknowledged by the Libyan government through its Board of Environment and other associated authorities. Where, most of the participants were not happy with the current communication services provided in Libya, which are generally regarded as a significant factor of tourism development and marketing strategies, since it facilitates contacts between tourism attractions places, tour operators and the tourists' home countries.

- Tourists' Satisfaction Rating of Price Levels

Ultimately, customers and producers view the price of a product from different angles. Customers are trying to maximize their perceptions of benefits and value for money, while producers are aiming to achieve an increase in sales, revenue and market share. However, despite the fact that total selling price is one of the strongest influences on the number of tourists, who choose specific tourism destination to visit, prices are not the only factor. If a country lacks adequate facilities and inefficient services, or is poorly known to the travelling public, its cheap prices will not be so much of an advantage. The purpose of this section within the questionnaire is to assess the degree of satisfaction experienced by tourists with tourism services and facilities in Libya. Participants were asked their views on cost of air flights to Libya; local transportation; accommodation; food and drink; package tours to the destination; general prices of trips and shopping. Again, a five-point scale ranging from "very poor value" to "very good value" was used. In addition, a separate column of "do not know" was attached to the scale so as to assess more accurately the opinions of the respondents. Table (5.7) shows the answers received

from respondents and ranked in order according to the mean value. It is important to note that the higher the mean value, the lower tourists considered the price of the tourism services and facilities.

Table (5.7): Tourists' Satisfaction Rating of Price Levels in Libya

Elements of perception	Very dissatisfied	Dis-satisfied	As expected	Satisfied	Very satisfied	Do not know	Total	Mean value
Food and drink	8	12	42	64	45	84	255	3.7
Local transportation	12	16	35	42	37	113	255	3.5
Accommodation	7	11	30	16	21	170	255	3.4
General price of trip	19	15	41	46	23	111	255	3.3
Air flight to Libya	12	18	36	27	20	142	255	3.2
Shopping	24	17	32	30	27	125	255	3.1

Source: Field Study

The higher the mean value, the more important the tourist considered the reason.

(Very poor value = 1; Poor value = 2; Satisfactory = 3; Good value = 4; Very good value = 5; Do not know = 0)

From table (5.7) above, it can be observed that respondents appeared to be highly satisfied with the prices of food and drink, and local transportation, while they were less satisfied with the prices of accommodation and the general price of trips. In contrast with the price level of the services and facilities shown in the table, respondents were rather dissatisfied with the price of air flight to Libya and the price for shopping. However, the airfare represents an important factor in the selection process of the tourism destination. Respondents were not satisfied with airfares to Libya because of the fact that tourists who fly directly to Libyan Airports have to pay high prices. This is a major reason why that a huge part tourists prefer to visit the country via Tunisia and Egypt borders or use other airlines in order to guarantee cheap flight fares. Competition between Libyan and foreign air carriers is the way to achieve competitive airfares to and from Libya.

Furthermore, with regard to shopping prices, which tourists were not satisfied with, this dissatisfaction might be because there is little or no control on market prices in Libya. Sole Traders or retailers have complete freedom on making their own price decisions,

which may result in high prices especially for those who are not familiar with local market prices based on demand and supply mechanism. Like many tourism destinations, bargaining on price, is considered a critical issue and an undesirable phenomenon among many European tourists. Finally, from the above findings it can be understood that respondents generally were satisfied with the price of all tourist services. If the scores of the first two columns: 'very poor value' and 'poor value' outweighed those scores of the following three columns: satisfactory, good value and vary good value, it would mean that the tourists were dissatisfied with the price of tourism service and facilities in Libya. The convene results would be satisfied with the price of tourist service and facilities in Libya.

- The Overall Satisfaction of Tourists Visiting Libya

In order to find out the overall satisfaction of tourists visiting Libya, respondents were requested to describe their visit to Libya. Then, they were asked whether they would visit Libya again. Figure (5.4) demonstrates the overall tourists' opinions. However, figure (5.4) illustrate that the majority of tourists visiting the country were not sure if they would come back because it is too early for them to decide. Where, many international tourists who answered yes/they think they will come back and only a few of the respondents answered no/they do not think so.

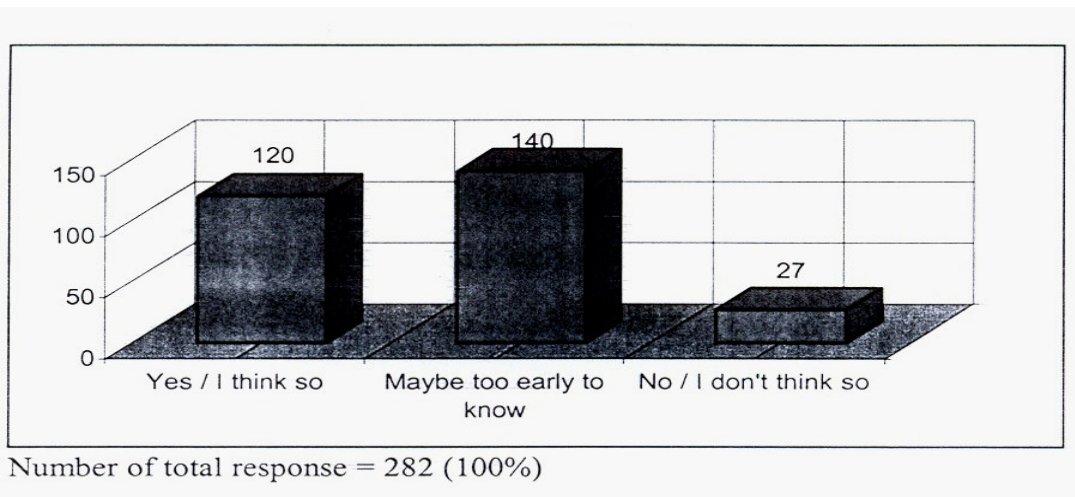


Figure (5.4): The Overall Satisfaction of Tourists Visiting Libya

Additionally, with the purpose of attaining more information about tourists who, were dissatisfied with their visit to Libya, those who decided not to visit Libya again were invited to specify the most important reasons that discourage them from doing so. A number of logical reasons were proposed to them by the questionnaire and an opportunity was given to add any other reasons considered by the respondents not to visit Libya again. Table (5.8) demonstrates the reasons, which discouraged them from thinking about coming back to Libya again. These respondents represent only (7.8%) of the total respondents. The most four important reasons, which had a serious effect on the decision of the respondents who decided not to visit Libya again were: Lack of hygiene, little to do and see, untidy dirty beaches and visa entrance problems respectively. As a result, such reasons should be carefully considered by the GBT in Libya to take the necessary steps to overcome these issues by co-operation with other authorities to overcome these problems. Lack of hygiene is considered as a serious problem, which may affect in one way or another visitor's decision to visit a particular tourism destination. In addition, the diversification of the Libyan touristic products is another important factor, which has a major influence on attracting the actual visitors to come back as well as increasing the potential visitor's length of stay. Regulations regarding visa entrance for international tourists should be also reconsidered in order to facilitate the visa granting system, which can be a motivating factor to increase international tourist arrivals to the country and reduce their opportunities for choosing another tourism destination in region.

Table (5.8): Tourists' Opinion on Reasons for not Visiting Libya Again

Reasons for not coming back	Frequency	Percent
Lack of hygiene	12	54.5
Little to do and see	10	45.5
Untidy dirty beaches	10	45.5
Visa entrance problems	9	40.9
Poor nigh life	8	36.4
Lack of variety of attractions	6	27.3
Lack of tourist information sources	5	22.7
High cost of getting there	3	13.6
Uncomfortable accommodation	3	13.6
High prices generally	2	9.1

*Number of total valid response = 22
(Responses exceed 100% due to multiple responses)*

- Demographic Data Analysis

Age Group

Table (5.9) presents the age of the respondents. The Table indicates that only (6.8%) of the sample was less than 25 years. The majority of the respondents were in the age group of (55 to 64) and over 65 age groups that represent (23.5% and 22.8%) respectively.

Table (5.9): Age of the Respondents

Age	Frequency
Under 25 years	19
25 – 24	52
35 – 44	36
45 – 54	44
55 – 64	66
65 years or over	64
Total	282

From the above table (5.9), it can be understood that there is lack of tourism activities for young people, where the majority of tourists visiting Libya were senior people needing less tourism marketing activities. In addition, beach tourism, which includes varied activities such as diving and water sports, is still completely unexploited due to the severe shortages in accommodation, expertise and other tourism facilities. This type of tourism activities may find a tremendous appeal by tourists as well, as it is the most significant source for increasing the number of tourism arrivals.

Marital Status and Gender of Respondents

As illustrated in table (5.10), (53%) of respondents in the study, were males and (47%) were females. Regarding to martial status, the majority (58%) of the respondents were married couples.

Table (5.10) Marital Status and Gender of Respondents

Martial status	Frequency	Gender status	Frequency
Married	163	Male	150
Single	95	Female	132
Widowed/divorced	23	Valid cases 282	
Valid cases 281			
One incomplete response			

Employment Status of the Respondents

Figure (5.5) below shows information about the respondents’ occupation position. The majority eighty (28.7%) of the international tourists were retired. The Figure (5.5) also illustrates that sixty-five (23.3%) of the respondents were Professionals (i.e. doctors, lawyers, teachers, etc), which occupied the second place, and the remaining were other occupations such as office workers.

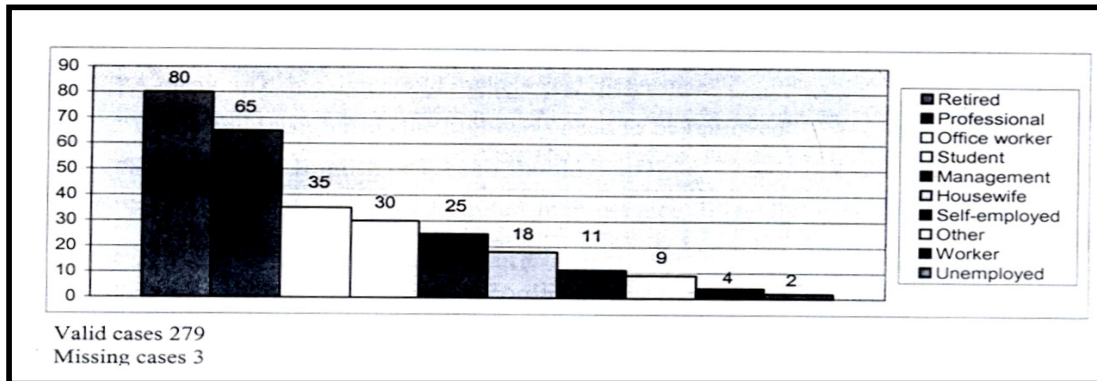


Figure (5.5): Employment Status of Tourists Visiting Libya

- S.W.O.T. Analysis of Libya as a Tourism Destination

Respondents were asked to identify the strengths, weaknesses, opportunities and threats of Libya as a tourism destination, the following findings are concluded according to their experience:

Strengths

Climatic conditions of Libya vary from one part of the country to another. The mean daily temperature does not fall below 5 degrees. Summers are relatively hot with the

hottest month being August. Mean monthly temperatures during this period do not exceed 30°C-40°C (WTO, 1998). This kind of climate has the ability to offer Libya as whole year around destination. The country has an extensive and mixed range of tourism resources that are spread widely throughout the land area of the country. These include the desert, historic towns and cities, beaches and sea, the mountains, classical archaeology and other tourist resources, such as health tourism, scuba diving and religious tourism. These tourist attractions are located in different regions throughout the country. Moreover, significant new discoveries of prehistoric, early Libyan and classical remains and handicrafts are still being made. Consequently, these new discoveries will definitely strengthen further the historic resources of the country. In addition, Libyan people are characterised by pleasant hospitality. The tourist survey in Chapter Six, (See Table 6.6) demonstrated that, the attitude of local people towards international tourists and personal security, which represent critical factors in some other destinations achieved a satisfactory response from international tourists. Therefore, tourists will be encouraged to repeat visits as well as prolonging their length of stay.

Weaknesses

Although, the country is bestowed with natural and man-made attractions, lack of investment in infrastructure, the substandard facilities and services offered are inadequate. In addition, some of these attractions are not fully exploited, due to the lack of tourism facilities and services in these areas. In addition, many tourist areas of Libya are not yet fully explored, and even known features are not fully documented. There is a lack of available accommodation in terms of both quantity and quality of service in or close by the principal attractions, such as classical archaeological sites, selected costal areas and convenient desert stopover points suitable for international tourists. In addition, the facilities in some attractions lack road signposting and informative signposting at places of interest that are in languages other than Arabic. In, there is real shortage of road maps of Libya as well as detailed ones for the principal towns and cities. In addition, there is a need to improve the existing information centres at the site areas and establishing more information centres in the main cities, which can be of great help to international visitors. Despite the large number of restaurants, there are only a few that are of an acceptable standard to international tourists. Besides that, there is little or no

entertainment or cultural activities organised for presentation to visitors. In addition, the availability of Libyan souvenirs and handicrafts in general, and those of good quality in particular are lacking. Consequently, the shortages of these facilities will definitely have its negative impact on the level of tourist demand. The negative image of the country as a tourism destination held among the European tourism markets resulting from western media attitudes in the 1980's and early 1990's might be other factor causing the delay of international tourism growth. In addition, there is a lack of awareness and knowledge in the international markets, by prospective tourists, due to the lack of effective promotional campaigns. Inadequate budget and lack of expertise were a major reason for ineffective promotion or tourism marketing at international level to sell Libya's tourism product.

Opportunities

Tourism in Libya should not be viewed only as a significant contributor to the national economy but as a reflection of the Libyan's national image as a tourism destination throughout the western world, which represents the largest generator of international tourism. In addition, the lifting of the UN air embargo recently is an important factor in the future development of tourism in Libya as, in air-flight terms; it is situated close to this particular market. Moreover, in the future, Libya has the opportunity to develop the general interest touring-circuit markets in different parts of the world such as North America, East Asia (especially Japan and Korea) and Australia. However, the potential of the Libyan tourism products exists in various areas. Beside these markets, there are the markets of scuba diving, spa tourism, marine-based activities (e.g. game fishing, flotilla sailing) and fairs tourism. Business tourism is emerging as a powerful economic segment of the industry throughout the world. Especially after lifting the UN embargo, opportunities exist to utilise facilities in the country, organised efforts to conduct conferences, meetings, conventions and exhibitions, leave much more room for development. In addition, Libya has introduced tourism as an attractive developmental option to sustain the national economy, which for many years has been bolstered by the oil factor. Therefore, this recognises that ongoing economic diversification opportunities represented by the development of the tourism sector and its integration within wider economic planning, could sustain the national economy.

Threats

There is no proper well-defined principle to develop tourism on systematic and orderly lines. The personnel in the tourism sector keeps changing, which results in different policy ideas for the development of tourism. It is a severe threat to ongoing projects to stop funding or delay the execution of tourism developments or marketing plans. Sometimes inadequate capital does not allow the completion of a project. Moreover, it has been observed that many of the potential tourists prefer to travel for beach tourism, and this segment is almost absent in Libya due to the lack of tourism facilities and services, which may give more credit to competitors. Some of the administrators indicated that, as tourists increase, the need for improving the level of security became essential. In their view, the best way to avoid this problem is to increase the number of tourism police personnel to offer the safety and security to international tourists.

5.3 Personal Interviews' Survey

The researcher approached several key tourism administrators from the Libyan GBT (General Board of Tourism) and other PTBs (Provincial Tourism Boards) in order to conduct face-to-face interviews. The majority of those key tourism administrators were on the top of their Boards. However, seven professional administrators were contacted and interviewed. Three were representing the Libyan GBT, while the remaining four were representing four different PTBs. These PTBs are branches of the Libyan GBT. This survey aims to examine the following elements:

- Administrators' view about Tourism Developments in Libya

Libya enjoys a unique tourism potential, which gives the country renowned as a new tourism destination in the North African tourism region. Where, this potential needs good planning and marketing strategy to meet international tourism requirements. In addition, international tourism development cannot be achieved unless all the essential tourist facilities and tourism infrastructure become available. As tourism is an interdependent sector, all tourism development plans would be better integrated into other economical sectors' plans in order to accomplish positive results. Moreover, there is still a lot of

work that needs to be done before Libya can compete with other countries as a popular tourist destination. For many years, there has been a lack of investment in the country's infrastructure. Service facilities and personnel are inadequate to meet the demands of an increasing influx of tourists. Therefore, marketing and promotional strategy become essential to improve the image, awareness and knowledge about the country that Libya really lacks.

All members realised the tourism sector's economic importance and desired to promote international tourism. All interviewees pointed out that international tourism would make a significant contribution to the Libyan national economy. They desired to develop tourism in the country with a view to boosting foreign exchange, to provide employment and to enhance economic diversification. Some members revealed that at present the concern for tourism development planning within the various tourism bodies is better than ever before. Especially after the lifting of the UN embargo on flights to Libya that last for nearly a decade, which was viewed by all members as a major obstacle for the delay and the slow development of tourism in the country.

- Tourism Effectiveness on Increasing the Libyan Standard of Living

Interviewees were asked about if the increase in number of international arrivals could be helpful in raising the standard of living and thus improving the national economy. All interviewees, believing that all the community will benefit from the increase in number of international tourists directly or indirectly, appreciated international tourism as a potential economic contributor. Where, some of the interviewees revealed that the lack of accurate information about international tourist arrivals, direct and indirect expenditure resulted in difficulties in analysing the impact of tourism activities on its economy. (Chapter 2 addressed the shortcomings of limited information provided on the contribution of the tourism sector to the national economy and suggestions had been given to overcome this problem). However, for tourism development to be successful, the community should be involved in all kind of tourism plans and should be recognising the benefits of tourism, which will have an effect of the host community's attitude towards international tourists. Informing the host community of these benefits can be done through various methods such as advertisements in the local media and educational programmes especially for those who work in tourism related services organisations.

- Implementation of the Master Plan of Tourism Development in Libya

This question was designed as an attempt from the researcher to know to which extent, the master plan of tourism Development (1999-2018) has been implemented to sustain and enhance tourism development in Libya. All interviewees agreed that only up to 10%, of the plan been achieved. The major reasons were due to financial constraints and the inadequate involvement of the tourism private sectors before the Libyan GBT has finalised the master plan in (1998). For the plan to be successful, the government should encourage both the local and foreign companies to invest in the tourism sector. Therefore, the investment regulations should be more attractive to motivate various parties under government control. The government of Libya has taken an interest in developing the tourism sector by introducing investment opportunities through a number of regulations such as; Law No 5 (1999) to enhance foreign direct investment in Libya, and Law No 7 (2004) of Tourism. Nevertheless, in reality, there are still a lot of managerial and technical obstacles that face international businesspersons or organisations interested to invest their financial resources in the Libyan tourism sector and other related economic sectors. In fact, its' obvious that in order to enhance tourism in Libya, a massive national investment to develop infrastructure, to attract more international tourism markets and fulfil the desires of international tourists is urgently needed.

- Importance of Tourism as a Finance-Generating Factor Apart from Oil

Interviewees were requested to .express their view on, whether the development of international tourism could reduce the country's dependence on oil. All interviewees agreed that the development of international tourism could reduce the country's dependence on hydrocarbon and for decades now, the country's economy has been very dependent upon the oil revenue and could clearly benefit from tourism development to make the country's economy less dependent on oil. Like any other oil dependent countries, Libya has realized the fact that economic diversification is essential in order to reduce its dependence in oil revenue, which represents more than 90% of the county's hard currency income. In addition, the recent fluctuations in oil prices and the emergence of new oil export countries have made Libya's drive towards economic diversification more serious. Moreover, Libya can benefit from the development of international tourism to create job opportunities, to boost foreign exchange, to solve balance of payment problems and to improve the community's well-being. However, despite the intense

efforts to develop the tourism sector in Libya to attract visitors from all over the world, there is still much work to be done in order to meet the international tourism market's requirements.

Several foreign companies have been sending delegations to explore business opportunities in Libya and some contracts have been placed. Some of these companies have tourism expertise. The major aim is to attract a direct inflow of foreign investment into tourism-related businesses to bring advanced technology, technical and managerial skills and marketing expertise to the country.

- **Improvements Needed to Improve Tourism Related Services**

From table (5.11), it can be seen that most interviewees agreed that all tourism related services in Libya require improvement programmes in order to meet the international standard or quality level. Accommodation, which represents a critical issue in the tourism related services, is a serious deterrent in the way of the development of tourism. The number of rooms is inadequate and the quality of services and facilities are below required standard to meet the international tourist markets requirements. In addition, international flights, local transportation and visa entrance appeared to be lacking sufficiency and efficiency to satisfy international tourists' desires. Telecommunication and security were the least critical services by the interviewees. Despite the intensive efforts made by the Libyan government to improve telecommunications, some rural areas, especially the ones close to the desert, and even some other big cities or towns still have poor telecommunication coverage in terms of mobile signals and providing reliable Internet services.

Table (5.11): Improvements Needed to Improve Tourism Related Services

Type of service	Frequency
Accommodation	7
International flights	6
Local transportation	6
Visa entrance system	5
Telecommunication	4
Security	1

Source: Filed Study
 Total valid response = 7
 Respondents exceed 100 % due to multiple responses

As a result, the GBT should take the initiative in co-operation with the authorized bodies of these services and should make sure that any future tourism strategic plans or marketing activities are integrated with all services illustrated in table (5.11) and other related services. This in turn, leads to positive impact on objectives and the tourism development in the country will be achieved.

- **Social and Cultural Impacts of International Tourism**

Interviewees were asked if they observed any social and cultural impacts due to international tourism. As illustrated in table (5.12), five of them did not observe any social and cultural impacts, whilst four did. Most of the interviewees considered independent tourism, which at present does not exist in Libya as a major factor in causing any social-cultural impacts. As a result, they think that the Libyan social and cultural aspects are not affected by international tourism. Ultimately, with the increase of tourism economic benefits, the emergence of negative social and cultures impacts at any tourism destination is a natural phenomenon. This is an important issue of concern for strategic planners in the tourism sector in order to devise good marketing policies for customers or tourists.

Table (5.12): Social and Cultural Impact of International Tourism

Response	Social and cultural impacts
Yes	2
No	5

Source: Filed Study
Total valid response = 7

- **Critical Issues Effecting Tourism Planning in Libya**

With regard to tourism-planning problems, which hinder tourism development in Libya, the aim of this question is to find out the major barriers for the observed slow tourism development and inadequate tourism marketing in Libya. The interviewees expressed their opinion and suggestions to improve tourism in Libya and overcome its obstacles. External factors, such as the UN embargo was a major reason for the observed slow tourism growth in Libya. In addition, there are other factors which were addressed in the

question include the following: Inadequate budget, mismanagement, lack of expertise, lack of human resources and lack of investment. All respondents considered most of the five factors, which were given in the question as tourism planning problems. These issues were major reasons for hindering tourism development in the country, except for mismanagement, which was criticised by five out of seven administrators. However, the inadequate budget, devoted to the development of tourism and the proper allocation of funds are serious issues for tourism planning in Libya as identified by the relevant tourism administrators during the field study. The provision of adequate infrastructure, attractions, accommodation, transportation, roads, railways, sea and air links and good management to facilitate the tourist flow are the essential elements to channel traffic towards tourism destinations.

Moreover, lack of human resources and expertise were another problems identified by tourism administrators. There should be an effective planning organisation manned by competent personnel with professional and technical specialisation to be able to formulate, implement, review and monitor all plans and to implement policies to achieve desired goals of tourism development. Where, tourism expansion is closely related to the availability of trained workers. Therefore, the supply of specialised education tourism institutes should be linked to a cohesive national training program. In addition, the existing institutes should be upgraded and supplied with the latest state of the art education and training technology as well as a national curriculum for tourism and hospitality should be developed and implemented. Furthermore, in order to make an effective use of tourism potential in Libya, detailed resource analysis and market research is required, but the lack of expertise and an inadequate budget are major obstacles to do so. Generally speaking , the tourism division in Libya is under-staffed with a lack of technical expertise. This ultimately leads to ineffective and inefficient strategic plans for the development of the tourism industry. This was a common barrier for tourism observed by the majority of the senior tourism administrators in Libya.

▪ Assessment of Tourism Potential in Libya

Interviewees were asked to evaluate the present potential of Libya as a tourism destination, using a five-point scale ranging from "very poor" to "excellent". The results are presented in table (5.13) below. The findings in table (5.13) illustrate that Four of the

interviewees revealed that the present tourism potential in Libya is very poor, average or poor, while, the remaining three evaluated the present tourism potential as good enough to serve the international tourists.

Table (5.13): Evaluation of Tourism Potential in Libya

Response	Frequency
Very poor	1
Average	2
Poor	1
Good	3
Excellent	0

Source: Filed Study Total valid responses = 7

From the above findings, it can be noted that, despite Libya possessing both natural and cultural attractions to motivate tourists to visit the country, the development of tourism in Libya has been at slow rate. The main weaknesses lie in the facilities and services provided not the attractions, which are not well developed. For example, due to the shortage of sea resorts, villages and hotels the demand for beach tourism is very low. Where in countries such as Egypt, Tunisia and Morocco, as competitors to Libya in the North African region, their tourism is much more developed and receive millions of international tourists compared with Libya (see chapter one). This because they provide better tourism services according to well-established marketing strategies and frameworks. Although, the country has a wealth of tourism assets in natural and build environment to offer, its tourism sector cannot really flourish without the necessary supporting facilitated infrastructure. Therefore, this recognises that ongoing economic diversification opportunities represented by the development of the tourism sector and its integration within wider economic planning strategies, could sustain the national economy. Tourism generated revenue could play a vital role in providing tourist facilities needed for newly emerged and unexploited tourism attractions sites in the country.

- Exiting of Tourism Marketing Departments

Interviewees were asked about the organisational structure of their boards in terms of whether they have a marketing department and the existence of tourism offices abroad. In order to get a more accurate answer for the first part of the question, another question concerned, whether it should be separated marketing department or combined with other functions. From the findings, it can be observed that four of the interviewees who represent the PTBs revealed that they have neither marketing departments nor tourist offices abroad. The other three do have a marketing department. It appears that the only board of tourism, which has a pure marketing function department, is the GBT. This indicates that the marketing function is a centralised activity. Arguably, a marketing department or its equivalent is essential to such PTBs in order to undertake marketing activities such as marketing research, tourist surveys etc. None of the tourism boards under investigation has tourism offices abroad. This missing activity could be one of the major means, which would enhance the relationship between the Libyan tourism market and the tourist markets abroad. In addition, the establishment of these offices can play a significant role in improving the country's image as a new tourism destination among international tourism markets.

- Marketing Policies Employed to Promote Libya Abroad

It is the GBT's main responsibility to promote Libya as a holiday destination at international level by using various means: Advertising in media abroad mostly on the internet, tourist brochures sent to both Libyan diplomatic missions abroad and foreign missions in Libya. All interviewees revealed that, at present, tourism exhibitions organised abroad are the major promotional tools used to expose the Libyan touristic products to the international tourists. However, the existence of tourism offices abroad could play a significant role in promoting Libya at international level, for two major reasons: First, they will be situated closer to the tourism market abroad, which may facilitate the determination of this particular tourist markets' requirements. Second, they may establish and consolidate a relationship with tourism companies working there to improve the country's image as a tourism destination and offer information and guidance needed by tourists. Moreover, Libyan Aviation companies could also play an important role in promoting Libya as a new and attractive tourism destination at international level

through their offices and stations based abroad. Airfare incentives are the way forward to increase the destination share, as the airfare to Libya has been a critical issue by international tourists included in the survey (See the previous section). Therefore, there is a real need to offer holiday incentives not only to attract tourists but also to convince and encourage the travel agents, tour operators, etc, to sell the destination.

- Tourism Marketing Plans and Strategies Applied

The marketing plan produced for tourism by the GBT aims to increase the number of international arrivals by boosting Libya's proportion of the tourism generating markets compared to its competitors in the region such as Tunisia, Morocco, and Egypt (see chapter one). This needs to consider various marketing aspects to make sure that the tourism services offered are competitive and "value-for-money". In fact, it is essential to provide a competitive product, as there is an element of inseparability and perishability in the service sector, in addition to seasonality and demand fluctuations and interdependence of the tourism sector. These elements should always be taken into consideration when deciding on any tourism marketing plans in order to minimize the losses. The strategically planned and managed tourism marketing is severely required to attract potential tourists by providing product promotional material through the travel agents, TOCs, and other possible means such as advertising campaigns and tourism exhibitions or events. According to interviewees, there is no clear evidence that the Libyan GBT has applied marketing strategy. However, the GBT has focused its marketing efforts on broadening promotional activities only, which include participating in the famous international tourism exhibitions or conventions in Berlin, London, Madrid, Milan, and some nearby countries. As well as organising, the Libyan Tourism Events abroad in order to feature the country's unique culture and heritage aspects.

In contrast with rival tourism destinations in the region, the demand for Libya as an attractive destination in the international tourism markets is relatively low. Therefore, the need for implementing a new tourism marketing strategy within well-designed framework has become essential in order to employ other promotional methods beside exhibitions or events to target more tourism market segments. To achieve this, an adequate budget needs to be devoted and coordination between the GBT and the Libyan private travel agents or tour operators is important to broaden the marketing campaign's

action plans. Moreover, when planning for tourism marketing strategies, the social and cultural aspects in Libya should be considered in order to avoid possible deterrents to the development of tourism sector. Once the prerequisites for the type of tourism development are established, it is essential to develop more diversified tourism products with a combination of tourism assets to attract more tourists and improve the image of the country as a tourism destination. In addition, more efforts should be made by all parties involved to make sure that tourism facilities and services are of a high standard internationally acceptable and that tourism personnel working in the Libya tourism sector are well trained to meet these high requirements.

- Interest in Tourism Market Segmentation

All interviewees confirmed that at present most of the tourism marketing efforts are interested in targeting the European market segments. Some other promotional activities were applied to the Arabic and Asian tourism markets. Interviewees from the Libyan GBT indicated further that more markets that are international would be targeted in the future. This will depend on the tourism potential available and the sufficiency and efficiency of this potential to meet the standard level internationally. However, Market segmentation is the necessary first stage for setting accurate targets and budget of tourism marketing strategies. In addition, it is involved in developing the right products to meet current and potential tourists' requirements. There are several methods such as price, product or behaviour that could be used to divide tourism markets, which, technically are based on marketing research and future expectations.

- Marketing Research Carried Out

Respondents from the GBT and PTBs gave a negative reply to the question as to whether or not they undertake any tourism marketing research. In addition, a negative response was given to the question of whether the budget devoted for marketing research is adequate. From this it can be understood that none of the segmentation methods, which have been referred to in the previous section, are employed for the purpose of dividing up tourism markets for marketing purposes. This might be due to two reasons. First, lack of marketing expertise in the GBT or PTBs and second, the financial resources devoted for the purpose of marketing research seem to be inadequate. However, the most important task to be carried by the GBT and PTBs is to provide all the marketing personnel with

high training knowledge and techniques locally if possible or by contracting internationally with some foreign expertise as an initial stage. In the future, the local trainees can take over to educate and train the rest of the employees within the tourism organisations to sustain their efforts for better tourism marketing planning or strategy. Regarding budget constraints, both the GBT and PTBs should review the allocation of their existing financial resources to cover all the necessary marketing elements including market research. In addition, financial contribution by the Libyan private tourism companies (travel agents and tour operators) is necessary to sustain the efforts of marketing research and enhance the tourism sector in Libya.

- Pricing Levels of Tourism Related Services

With regard to the prices presently charged for transportation, accommodation and other related tourism services, most of the interviewee felt that they were poor value (see table 5.14).

Table (5.14): Pricing Level of Tourism Related Services

Good value for money	Frequency
Yes	2
No	5
Don't know	0

Source: Filed Study Total valid response = 7

However, in a highly competitive and price sensitive market such as tourism, prices of accommodation, transportation, telecommunications and other related services play an important role to support the country's tourism sector. As a result, the major task of tourism marketers in Libya is to find ways in which, prices can be reduced below or at least equal to those offered by the competitors in the same North African region, bearing in mind all factors effected.

- Libya's Main Tourism Competitors

When the interviewees were asked about Libya's major competitors in order of rank and advantages they have over them. They revealed that there are three major competitors to Libya as a tourism destination, which are Egypt, Tunisia, and Morocco located in the same region (as highlighted in chapter one). In the respondents' view about the advantages that Libya's touristic product(s) has over its competitors, they stated that the Libya's tourism product diversification and its uniqueness in aspects, such as culture, heritage, archaeology and hospitable local people are not less than that of its competitors. However, competition has proven to be an important aspect in tourism development. For instance, Egypt and Libya are offering a relatively similar type of natural tourism products (historical or cultural), but due to various tourist aspects such as international image, price factor and tourism facilities and quality services, Egypt is considered a more popular destination among the same international tourism markets. Typically, in a competitive situation, tourists demand incentive fares. For instance, as has been experienced by international tourists in the previous section, air or travelling fares for Libya are more expensive than the airfare offered for Egypt, Morocco and Tunisia that have a policy for special incentive packages for their tourists. The better provisions of tourism services, well based promotional activities, tourism expertise and indigenous tourists' awareness of those countries in the region diminish the scope for Libya. As a result, in the free and highly competitive market, to offer attractive tourism products with respect to high quality and low price is the pressing need for Libya to enhance its regional tourism market share. In addition, Libya is still a new unspoiled tourism destination to the international tourism market. Therefore, it should concentrate more on quality-tourism approach rather than the old mass-tourism or *tourisme de mass* adopted strategy in the past. Lessons should be learnt from other tourism countries, which are presently trying to convert to new tourism approach based on highly perceived quality and environment friendly tourism products or services.

5.4 General Research Comments & Suggestions

▪ Comments by International Tourists Visiting Libya

An open-ended question at the end of the questionnaire invited tourists to express their views of Libya as a holiday destination. Some of their remarks are represented in the following points:

Some Good Points Regarding Hospitality and Tourist Potential

- "We had a great time in Libya; find it a very interesting and hospitable country"
- "The historic sites are magnificent" "Leptis Magna is the best preserved Roman sites we have seen"
- "Thank you for a great visit to your fascinating country"
- "Good potential"
- "Good tour leaders"
- "Friendly people and staff"

Critical Points Made by Tourists Regarding Improving Tourism Facilities (Cleaning and Hygiene)

- "A clean up campaign could make a real difference"
- "Waste and trash beside the highways need to be removed"
- "Road signs in English or French should help"
- "Improve hotels quality. Regular maintenance is really necessary in all rooms"
- "Hotels should be graded according to the international standard and regulations"
- "High prices generally" "More small and medium-size hotels, more modern restaurants, more cafes and improve nightlife, and investment in beaches"
- "Need experienced people to deal with tourists; well trained in languages"
- "Foodstuff served in hotels should be improved. Service should be up to the standard"
- "Need more beachfront facilities and more tourist focus at historical sites"
- "Payment system - credit card machines, credit cards acceptance is a critical issue"
- "Improve toilet facilities and hygiene"

- "Improve the quality of transport to desert"
- "The timing of international flights should be more accurate and Improve domestic flights in terms of services and more routes"
- "Reduce the number of check stops and easiness of checking procedures" "Easier visa regulations and border checking procedures"
- "Infrastructure needs to be addressed as soon as possible"

From the above comments, it can be noted that despite the magnificent historical, cultural and scenic appeal to attract international tourists, there is a lot to be done for Libya as a tourist destination to meet international tourist market requirements. There are several issues, which need to be addressed for the country to compete on the international level. Infrastructure is considered to be at the top of the major issues that should be addressed as soon as possible, starting with the main cities and extended to include the urban and rural areas in the long-term foreseen future. Hygiene and cleanliness levels were other concerns, which got the attention of the majority of respondents. Historical sites, besides roads and beaches were other tourist attractions addressed by respondents in terms of cleanliness and hygiene. In order to overcome this problem the Board of Tourism in Libya must co-operate with the environment cleaning authorities and other associated personnel in the country in order to organise a cleaning campaign throughout the country. Moreover, other comments regarding tourist services and facilities were addressed by the respondents. These include: The increase of small and medium-sizes hotels in the main cities and close to the tourist attractions to provide enough rooms for tourists all reduce prices which were a real concern among several respondents. Improving the services of international flights and reducing flight fares to be more competitive. This may discourage international tourists using other airlines or travelling via borders. In order to avoid or reduce car use to travel to tourist . Attractions based in the desert, domestic flights also need to be more handy for tourists. More domestic routes and airports should be established. Finally, visa regulations, human resource training, nightlife activities, checking procedures at airports, borders and check points should be reviewed.

- Comments by the Tourism Boards' Administrators

An open-ended question was directed to the interviewees about further prospects of Libya's tourism industry. The view expressed was that the provision of tourism infrastructure and services are essential to facilitate tourist demand. Tourism educational programmes for inhabitants by various advertisement tools should be provided. Human resources for tourism should be highly concentrated in terms of education and training programmes and exchange of tourist experiences with distinctive tourist destinations in the region are required. Investment and expertise by private domestic and foreign sectors are required to boost the tourism potential. Government intervention is essential to sustain tourism development financially and to facilitate investment regulations for local and foreign investors. However, it was a common feeling of interviewees that standards of hygiene and non-availability of amenities and tourist facilities at some tourist areas discourage tourists to repeat their visit to the destination. Therefore, more care must be taken to improve tourist facilities and services. Air transport services should be improved, as it is an important mode to generate tourist traffic for the country. An effective marketing and promotional campaign for the available tourist potential in the country is a major factor for achieving success. Furthermore, some suggestions regarding the improvement of tourism sector were given by the interviewees such as; the establishment of a tourism bank to encourage local investors to invest in tourism related services; opening doors for independent tourism whilst taking necessary steps against any social and cultural impacts; the stability of the exchange rate for foreign currencies against the Libyan diner; and finally the implementation of the (1998) Tourism Development Master Plan (TDMP).

5.5 Conclusion

The research reveals that Libya has the historical, cultural and scenic appeal to attract international tourists (see chapter two and three for more details), where opportunities exist to further tourism development to achieve social, economic and environmental benefits. But the findings discussed in the previous section proves that marketing efforts or activities practised within the tourism sector in Libya have been inefficient in exploiting the country's potential. Nevertheless, tourism planning and development are the responsibilities of Libya's GBT. It is important to allocate

authoritative roles with managerial skills to the concerned tourism organisations (local tour operators or travel agents) in order to perform their duties. This helps to minimise tourism development and planning problems and to utilise tourism potential in the most effective and efficient way followed by a well-designed or framed tourism marketing strategy.

Moreover, the tourism attractions, which Libya possesses in its large geographical area, are not easily accessible. These tourist attractions require investment and expertise by all parties involved (both public and private) under full government control. Government intervention is necessary especially at the initial stages of tourism development to achieve the long-term socio-economic and environmental objectives. Moreover, the most contacted key tourism administrators, perceived tourism as a potential for economic growth and see the lack of tourism infrastructure and budget constraints, are major obstacle for the slow development of the tourism sector in the country. Improving Marketing facilities and services by local TOC and travel agencies should be addressed as soon as possible to meet the requirements of the international tourism market. Marketing activities have been undervalued by most tourism organisations, which have resulted in poor image awareness and knowledge of the country's touristic product(s) among international tourists markets.

Furthermore, due to the small number of international tourist arrivals to Libya (see chapter one), the present contribution of tourism to the national economy is very limited. Without government commitment to enhance tourism development and increase the number of international tourist arrivals, the objectives of Libya's master tourism plan to achieve tourism growth cannot be accomplished perfectly. Where, more focus on tourism attraction areas and other touristic products in Libya will add value to the international tourists visiting the country. Therefore, an effective tourism planning and marketing strategies within well-designed framework is urgently needed to achieve this important objective. The next chapter will discuss such new approach in more details.

6. RESEARCH DISCUSSION & INTERPRETATION

6.1 Introduction

The research hypotheses of this study were put forward in order to evaluate the potential of the tourism sector to contribute to Libya's economic and social development and to recommend what measures need to be taken to achieve an effective tourism marketing strategies. A number of research objectives were introduced and have been used to guide the direction of this study. The findings associated with these objectives and solution to the main research question have been presented in the previous chapter. Where this Chapter will discuss and interpret the research findings and provide some guideness to overcome the identified problems, which hinder the development of the tourism sector in Libya. The formulation of both strategic tourism planning and marketing frameworks within a combined a new approach will be the main concern of this chapter.

6.2 Justification for Tourism Planning

Tourism development can be an attractive activity in both developed and under developed countries. In the initial stages of tourism development, a great deal of money is required for infrastructure and facilities. Many developing countries cannot afford to finance construction internally and have to rely on foreign countries and corporations for assistance. In addition, developing countries are less self- sufficient than developed economies and are more liable to have to import such things as foodstuffs, beverages, construction materials, and supplies. The consequences will lead to a high leakage from the local economy (Gartner, 1996). Therefore, the decision to develop tourism or expand present tourism development must be looked at before beginning any tourism marketing activities very carefully. There are several reasons, which may be cited for tourism planning to avoid the negative impacts that occur to socio-cultural and other environments. The benefits from tourism need to be viewed as long run in nature (Eccles, 1995).

Moreover, the advantages of tourism exist in terms of sustaining the economy, creating employment and foreign exchange and many more benefits. Yet, tourism is not always a panacea for economic development. Government officials and business people must weigh the

economic benefits against the possible future deterioration of human and natural resources. As a result, tourism development must be guided by carefully planned strategy or policy. Parallel consideration must be taken of both the profit and loss statement and the principles of human welfare and happiness (Goeldner et al, 2000).

One of the basic requirements for all countries embarking on tourism development efforts is to be aware of the resources available to attract tourists to an area before undertaking any marketing efforts. In other words, planning is needed before taking any marketing action. In fact, marketing is perceived as the most important part of development, but without adequate planning, marketing is doomed to fail (Ayres, 2000).

If plans for destination areas not placed in orderly systematic sequences, they will be less successful and develop weaknesses. They will be less fulfilling to visitors and less sensitive to the environment stress. A combination of both approaches, initial project planning and continuous planning is likely to produce best results. Although planning processes vary, all have similar basic elements: setting goals, objectives, analysing the present situation; identifying issues, constraints, opportunities; developing alternative concepts for development and identifying action strategies. This is the only way communities can foster sustainable tourism development in a manner satisfactory to everyone (Gunn and Var, 2002).

A master plan should be prepared that allows development in stages, where each stage blending in with earlier ones. The master plan should allow modifications, as subsequent stages are introduced. Tourism planning can involve specialists to formulated and implemented, as well as experts in architecture, finance, marketing, economics, sociology and even archaeology (Coltman, 1989). Without planning, tourist facilities end up becoming less valuable. For example, in places such as Mexico and Waikiki Beach in Hawaii, access to the sea has been largely unplanned; hotels are located one next to another preventing public access to the beaches because the rich have had their hotels built on the choice sites.

Mathieson and Wall (1982), argue that tourism planning is required to attain the balanced economic, social and environment advantages from the tourism sector and describe various aspects to consider in planning to minimise the negative impacts. These are:

- To integrate the social and economic interests.
- To integrate tourism sector objectives with the other economic sectors.
- To evaluate the demand which should match supply components?

- To put special emphasis on the inventory of the tourist assets of the country.
- To take note of foreign investment or to evaluate the role of multinational corporations.
- To evaluate the manpower in relation to the needs of the tourism sector.
- To develop tourism facilities and transportation to support tourism planning.

6.3 Applied Tourism Planning Approach in Libya

Tourism planning has to be viewed in the perspective of sustained effort extending over a long period. Libya's development programmes are based on five-year development plans. Due to the lack of experience in tourism in Libya, international technical assistance has been sought from the WTO acting as executing agent of the United Nations' development programme in preparation of a national tourism development plans and strategy frameworks. The tourism plan aims to provide the country with a realistic and implemental base for the development of the sector through the establishment and promulgation of a policy framework, short and long-term objectives, supporting strategic guidelines and a five-year action programme for the period 1999 to 2003 (WTO, 1998). However, the overall objectives of the long-term national tourism development or master plan (1998-2018), are to establish a framework for the future development of the tourism sector in the country, that realistically reflects the potential of the tourism product throughout the country, the requirements of the current and the future domestic and international tourism markets, and the ability of the country to absorb tourism development. In addition, the planning team suggested that the tourism sector should not be considered in isolation from other economic sectors, though the sector should be integrated with the economic and social fabric of the country. Therefore, the policies, which were adopted by the WTO in the master plan for the development of tourism sector in Libya were too broad and required to be put in plans in order to help the implementation of such policies.

6.3.1 Existing and Planned Accommodation

Tourists' accommodation in Libya is very varied in terms of type, quality and size, and includes large international business hotels, old designed hotel down town, beach resort and holiday chalets, youth hotels and small campsites in the desert areas in the southern region. A total of nearly 9,000 rooms or their equivalent existed in 1998 in 123 separate establishments (WTO, 1998). In many locations in Libya, there are similar or competing tourism products. At present, tourism market demand may not be strong enough to support the development of all potential tourism in each part of the country. Therefore, the allocation of tourism potential

throughout Libya's regions has become essential without distorting the natural distribution of resources. Regarding this issue, the WTO (1998) introduced a proposal to refurbish of existing hotels and to establish new hotel accommodation in different areas, as shown in table (6.1).

Table (6.1): New hotel accommodation required in Libya (2003-2018)

Region	Bedrooms			
	2003	2008	2013	2018
Western	2770	2470	3180	5160
Southern	500	560	680	1160
Central	250	260	310	620
Eastern	1100	1160	1510	2660
Total	4620	4450	5680	9600

Source: (WTO, 1998)

6.3.2 Distribution Channels

According to Baloglu and Manaloglu (1999), the increase in the competitive nature of the tourism industries requires tourism destinations to develop an effective marketing plan and strategy. Although destination images and decisions of travellers are influenced by several factors, tour operators and/or travel agents have been suggested as significant information source and distribution channels influencing the images and decisions of travellers. Tourism operators and travel agencies, as intermediaries between suppliers, and customers, have played an important role in the marketing and distribution of the tourism products. The main function of these organisations is to serve the customer in tourism generating countries by packaging and selling holidays. In addition, they help destinations in promoting and marketing their attractions (Batman and Soybali, 1999). However, the Libyan travel trade has begun to play an increasing role in supporting the tourism industry, where, there is no clear distraction between tour operators and travel agents. Article 17 of Law No 44 (1968), defined travel and tourism offices as:

"Those that make transport and accommodation reservations and sell tickets; arrange tours, insurance and visas for travellers; sell foreign exchange and tickets for tourists".

In 2004, the new Libyan law of tourism amended this with the additional activities of owning tourism transportation, the provision of tourist guides, organisations of tourism fairs and festivals and the provision of service for conferences and seminars locally or internationally.

6.3.3 Main Generating Tourism Markets to Libya

A combination of factors has made Libya attractive to large number of visitors from neighbouring and other nearby countries in particular Tunisia, Egypt, Morocco, and Algeria. These factors include the relative wealth of the country and the small size of the Libyan population (around 6 million), which has led to opportunities for skilled and unskilled employment. This is might be a major reason for difficulties in distinguishing between visitors, who enter the country for the purposes of tourism or work.

- **Regional Markets**

Outbound tourism from North Africa and the Middle East sub-regions (As defined by WTO), grew significantly above the global average between 1985 and 1990. However, between 1990 and 1999 it went down below the global average due to the civil unrest in Algeria and the Sudan (WTO, 2005).

- **Non-Regional Markets**

According to (WTO) residents of the industrialised countries of Western Europe and North America, generate the largest volumes of tourists' flows. For Libya, there is still potential growth from these markets, as these markets are interested in new destinations, varied touristic products and value-added. The five largest outbound European travel markets are Germany, United Kingdom, France, Netherlands, and Italy respectively. In addition, US residents undertook more than 50 million trips to international destinations in 2005, and the Canadian market for overseas trips doubled during the same period.

The Asian markets that represent the most potential for Libya as employment or trade-related purposes, are the countries of the Indian sub-continent (India, Pakistan and Bangladesh), the Philippines, South Korea and Japan. In addition, China's outbound starts to be realised as, it became the fastest growing country for outbound travellers. Currently, most of the anticipated tourism to Libya is in the form of tourist circuits incorporating visits to major cities such as Tripoli and Benghazi, typically combined with other points, which are associated with various special interests or activities, such as, archaeological, trekking and mountain trails, desert circuits and World War II remembrance circuits (WTO, 2002).

6.3.4 Tourism Competitors to Libya

There are several countries in North Africa, the East Mediterranean and the Middle East, which represent the principal competitors to Libya for the various special interest market segments. Egypt and other countries in the Middle East, such as Jordan, Syria, Iraq, Lebanon and Iran represent the principle competition to Libya for culture-orientated study tours. Where, Tunisia and Morocco as North African countries comprise competition to Libya for the culture-focused study special interest tours, though they also cater extensively for beach resort tourism. Moreover, other East Mediterranean countries attracting cultural tourists to greater or lesser extents are Greece, Turkey, Cyprus, and Malta (WTO, 1998).

6.4 Implications of Tourism Marketing in Libya

Libya has an extensive and varied range of tourism resources that are spread widely throughout the country. These include attractive natural features and many different landscapes of the vast Libyan Desert, long and pure beach shores, human achievements in the form of buildings, art history and archaeological sites as well as modern manufactured attractions etc. These unique attractions need the provision of additional facilities to improve the presentation and interpretation at the major sites as well as facilities to improve visitor comfort. Nevertheless, implications such as inefficient resource allocation, poor infrastructure, and frequent policy reversals, in addition to the UN international embargo (which has recently lifted) are major reasons for the delay and observed slow tourism developments that lead to well-designed marketing strategies to promote the country. Despite the fact that Libya possesses a splendid variety of tourism products (natural, historical and cultural). The problems facing the tourism sector and the development of well-perceived tourism marketing activities in Libya are several and each needs to be considered carefully in order to formulate the right policy to tackle them. These problems can be summarised as follows:

(1) Lack of Services and Tourism-Related Facilities

In fact, sufficient infrastructure necessary for the development of successful tourism marketing is lacking. Most important amongst these, is that there is a lack of available accommodation in terms of both quantity and quality close by the principal attractions such as, classical archaeological sites, selected coastal areas and convenient

desert stopover points suitable for international tourists. In addition, despite the large number of restaurants, there are only a few that are of an acceptable standard to international tourists. The facilities regarding the presentation of some attractions is not wholly adequate for visitation by tourists, in aspects such as: lack of road signposting and informative signposting at places of interest that are in a language other than Arabic, inadequate road maps of Libya as well as detailed ones for the essential or large towns and cities. Additionally there is a need to improve the existing tourism information centres at the site areas and establish some more all over the country. Besides that, there is little or no entertainment or cultural activities organized for presentation to tourists or visitors. Consequently, the shortages of these marketing facilities will definitely have its impact on the level of tourists visiting Libya.

Moreover, the visa entrance system might be another deterrent for international tourists, as well as the fact that the official currency exchange rate for the Libyan diner is at a high level, which results in uncompetitive prices for tourist-related services such as accommodation and transportation, in contrast with neighbouring countries. In addition, Libya International Airport and ports facilities are not up to standard to meet international tourist market requirements. In addition, the poor communications between companies in the international tourism markets and Libya has resulted in an absence of awareness and knowledge of Libya's tourism resources and attractions.

(2) Lack of Awareness and Image

Beside the severe lack of tourism infrastructure, there is a lack of awareness and image of Libya as a new attractive destination among international tourism markets. The marketing promotional tools, which are presently employed by the GBT and PTBs are insufficient. Therefore, the need for a more effective promotional campaign has become essential in order to change the negative image of the county as a tourism destination that has been held in the outside world and particularly European tourist markets resulting from western media in the last five years. Moreover, this helps in providing adequate awareness and image about Libya's touristic products to the international tourism markets. Furthermore, at present, Libya is viewed as a cultural destination to be visited mainly for desert and adventure together with historical attractions and good weather. In fact, there are many other tourism attractions in the country, which presently are not fully

exploited, such as beaches, water sports, etc and this leaves potential for further developments.

(3) Lack of Competent and Efficient Human Resources

The tourism industry is a labour-intensive service industry dependent for survival and competitive advantage on the availability of good quality personnel to deliver, operate, manage, and market the tourism products. The interaction between the tourist and tourism industry personnel is an integral part of the total tourist experience. Tourism has one of the highest levels of labour skill shortages and Libya is no exception. However, in Libya, tourism related services have a lack of good quality personnel both in tourism planning and marketing. Therefore, there is an urgent need to develop human resources, particularly indigenous personnel, for delivering quality services for tourists, as well as enhancing the general skills of the local workforce. All hotels and beach resorts should be staffed with skilled managers and tourism marketing personnel to be more familiar with customers' needs and wants, help them to handle their enquiries and complaints as well as to meet an international standard of skills. As the industry continues to develop and managerial roles and companies become more complex, the nature of the unit management role will increasingly require the skills and knowledge that education and training bring to tourism.

(4) Lack of Marketing Research and Effective Marketing Activities

As been discussed in the previous chapter, the need for well-perceived marketing activities by the international tourists, which Libya is currently lacking, represents a key element for achieving an effective tourism strategy in the country. In addition to awareness and knowledge about the touristic products and improving the image of Libya as tourism destination among international tourism markets depends heavily on a good designed marketing research and Libya far behind comparing to other competing destinations in the region. Research marketing plays a vital role in understanding the needs and desires of the actual and potential customers. It is essential for responding quickly to international tourism markets and changing conditions, offering the country's tourism products in a more attractive way than its competitors as well as portraying the diversity of the Libyan touristic products in terms of society and culture, history and heritage while targeting specific segments related to individual types of activity or

pursuit. As a result, regular marketing research becomes essential, particularly in a strongly competitive and fickle tourism market. Where in a country like Libya, which entered the international tourism market or joined the tourism industry only recently, there is a crucial need for marketing research, in order to capture adequate information about various tourism market segments. This helps in understanding the attitudes of actual and prospective tourists and keeping up-to-date with their needs, wants and desires.

6.5 The New Strategic Approach for Tourism Planning & Marketing

In developing countries like Libya, there is continued emphasis on master plans, which are often made by external consultants, who usually come from developed countries, where there has been an emphasis on tourism master plans for larger areas. Those external consultants often do not undertake such tasks in their places of origin. In fact, such master plans are designed to attract external investors by ensuring potential developers that there is a broad vision for the destination area and that their investments are desired and secure (Wall, 2005). Where, Implementation can be a third related activity to planning and policy making process, which is the actual execution of these courses of action. It is a process of goals and actions geared to achieving them. Implementation involves mobilising, organising and managing the resources such as, finance, facilities development, work force and equipment. A prepared plan which cannot be implemented to achieve the desired results is useless and a waste of resources (Jenkins et al, 1998). However, the planning strategy is a link between policy-making, planning and implementation, while monitoring to analyse the best plan performance with a view to assess if objectives of tourism development are being achieved Goeldner et al (2000) argue that, although:

"Policy formulation and destination planning are different types of process, they must nevertheless be seen as integrated components of an ongoing process of destination management."

However, all strategic planning models for tourism have to reflect local conditions, while the flexibility to modify the existing theoretical models should match to a particular geographical area. In addition, to consider monitoring and evaluation of the tourism projects should be always the case for sustaining the tourism development. For this to be achieved, it is essential to improve the existing planning mechanism through better tourism statistics, investment incentives policy, market-oriented research and better tourism infrastructure. Trained management and qualified professionals, whom a tourism destination as Libya

lacks, are essential to achieve positive results through tourism planning before tourism marketing.

Furthermore, closely linked to tourism planning, the need for sustainability has been one of the most clearly expressed concerns in recent years. Tourism planners are familiar with the problems experienced in Spain, where over-development in the 1970s and early 1980s led to bad publicity and reductions in tourist arrivals. Problems start to emerge when development rushed over with little consideration for the environment. In fact, it is apparent that successful tourism planning requires both the involvement and participation of residents in the destination areas. Interaction between tourists and residents play an important role in the conservation of the local environment. This could be attained by developing tourism products that make the visitor care about and feel for the local environment (Haley and Haley, 1997). Therefore, it is important that tourism plan to be integrated into the national plan for economic development. This may give more opportunities for Libya to exploit resources at international level.

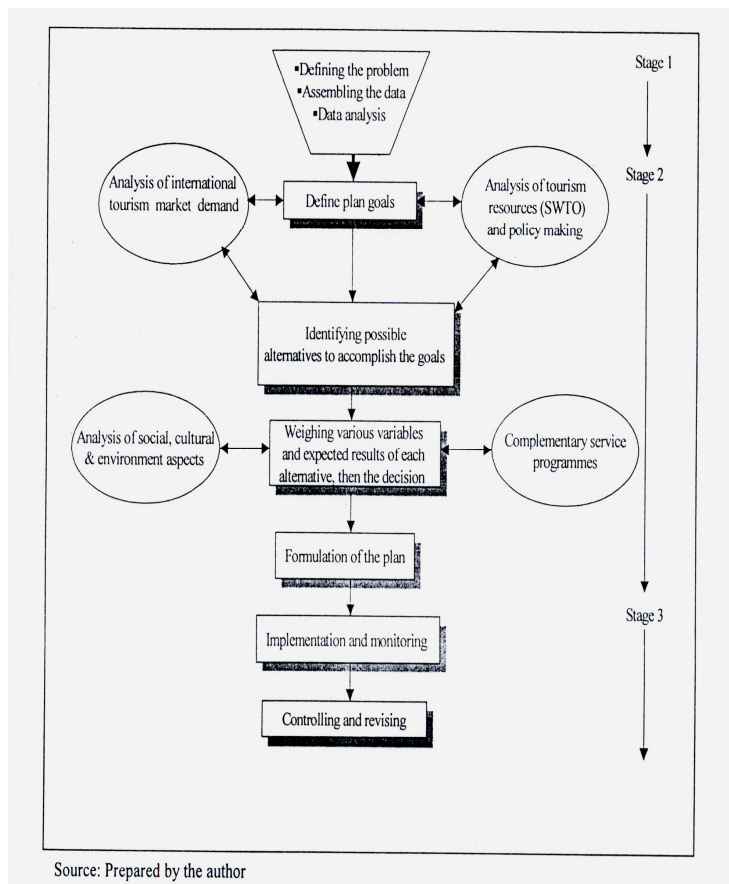
6.5.1 The Proposed Framework for Tourism Planning in Libya

From the above discussion and interpretation of the importance and justification for a well-developed tourism planning before formulating any tourism marketing strategies, it could be confirmed that government at all levels, should use its influence to encourage greater industry coordination on planning issues. This in return would be achieved by creating structure and processes which enable stakeholders to talk to each other and create effective relationships and partnerships (Hall, 2000).

To be more obvious, the researcher has proposed a new strategic framework for tourism planning in Libya in order to achieve sustainable tourism development in the country and lead the tourism policy makers to succeed their tourism marketing initiatives or strategies in the future (see figure 6.1 for more details). In fact, the first stage of this new designed framework covers marketing research to collect the relevant information and data. In the final stage after tourism plan implementation, it is essential to have monitoring and controlling in order to make the right policy corrections on time. This may help to identify the tourism plan's weaknesses or any other shortcomings. Thus, solutions could be made to overcome the problems hindering the demonstration of tourism development in the country before is too late to do so. In this new planning framework may assist the development of tourism in a country like Libya, which has a central-planning approach. Moreover, it may play a role in assisting the concerned planners

and policy-makers to develop suitable projects. This could lead to a prosperous economy as well as achieving social, cultural and environmental benefits to sustain the country's resources.

However, the new proposed tourism-planning framework has been designed to achieve the stated goals and objectives related to any tourism organization attempting to develop tourism potential for any destination area. The guideline given in this planning model, may lead tourism planners and policy makers in developing countries including Libya to plan and develop the tourism sector in a long-term horizon. In addition, any planning model should be tested to make sure that it fits to a particular local environment. For instance, Libyan tourism administrators, to be sure that such framework is suitable for the national environment should pay much concern to tourism plan and flexibility modifications of the plan to meet the specific objectives of tourism development. Moreover, any



theoretical model or approach to tourism should at least match the available resources to sustain the implementation process within a stipulated time. Tourism plan monitoring and implementation are also to be considered as important issues, which imply coordination, encouragement and regulation. Without this, all research efforts and findings will be wasted.

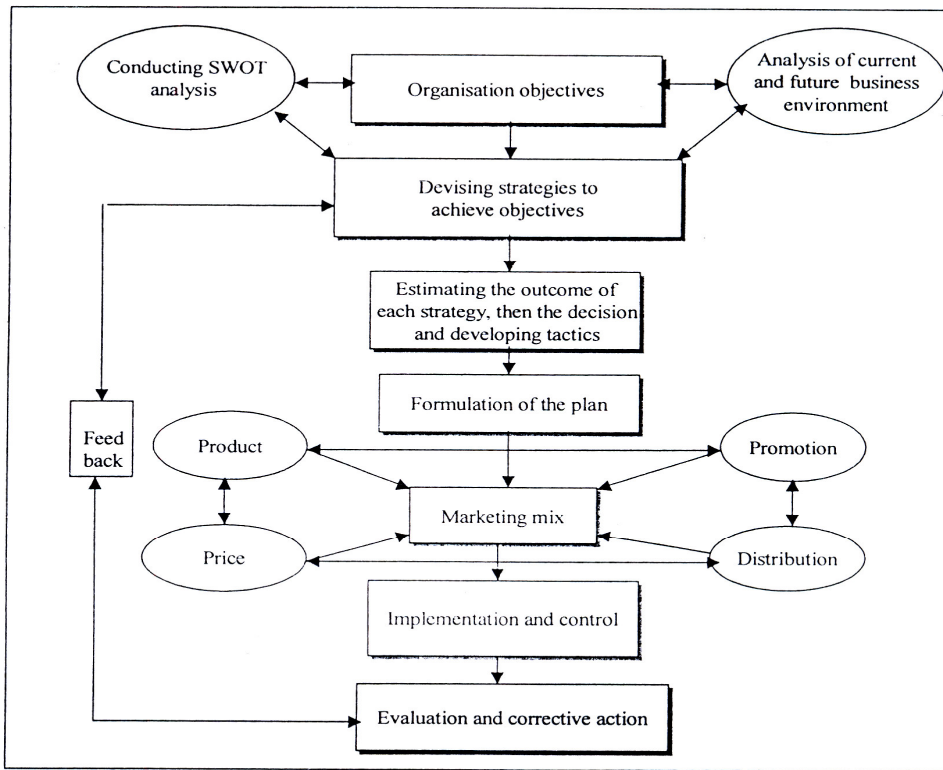
Figure (6.1): The Proposed Framework for Tourism Planning in Libya

6.5.2 The Proposed Framework for Tourism Marketing in Libya

As explained in the previous sections of this chapter, tourism planning has been proved to be an essential element for any tourism marketing approach or strategy. Therefore, after considering tourism planning, the next issue relates to organizational participation in tourism marketing and promotion. The marketing strategy should be adapted as situations change and be constantly re-evaluated. In addition, the strategic marketing framework has to be comprehensive and integrated into the nation's socio-economic and political policies as well as the natural and built environment and socio-cultural traditions. Where, all kinds of tourism organisations (tour operators, travel agents, etc) and general and regional tourism boards need to be engaged in developing a well- designed marketing strategy. A new approach to marketing strategy in countries like Libya is an essential process to identify tourism goals, resources, and existing opportunities for the country. Moreover, a new developed marketing strategy is needed to meet short and long-term objectives. In the short-term, strategic marketing approach is required to identify where tourism organisation (e.g. tour operator, travel agent, hotel, general or regional tourism board, etc.) is now, and where it will be next week. The funds, which will flow into the organisation, may not be easily predictable.

However, any tourism marketing strategy determines what needs to be offered in a given period, at a given price, and how this is to be achieved in order to meet operating costs. Beyond this, the organisation must plan to achieve its longer-term objectives. This may result in finding additional sources of capital or future investment. A marketing strategy should not be isolated. It must be integrated and co-ordinated with the financial plans, organisational plans, purchasing plans and other aspects of the organisation's total activity. As illustrated in figure (6.2), the researcher has approached tourism marketing in Libya as simple tool by which any tourism organisation achieves its objectives. By following such proposed marketing framework, the country, would be able to identify new tourism products attractive to international tourists and marketing opportunities, evaluating them and taking action to develop them. In case of Libya, an overview should be taken for three main areas: products, current markets and trends, which might affect tourism marketing. Furthermore, most tourism products are made up of several components, which can be quite complicated. Selling experiences and benefits rather than

features is the key to succeed in marketing Libya’s touristic products. In addition, well-trained personnel should conduct marketing research in Libya beforehand in order to find out what kind of modifications or related services or facilities that are needed in order to meet the international tourists’ wants and desires. Then position their tourism marketing strategy locally or internationally through the marketing mix tools before the implementation stage take place (see figure 6.2 for more details).



Source: Prepared by the author

Figure (6.2): The Proposed Framework for Tourism Marketing

Typically, new tourism destinations to meet tourists' requirements and monitor changes in consumer motivations and satisfaction with the tourism products in order to keep it up-to-date. For Libya to compete more effectively in the North African tourism market, a huge budget has to be devoted to improving infrastructure and establishing a number of new hotels and other tourism related services to meet these specific market requirements. Therefore, the need for promotional and marketing activities becomes essential. From that, it is obvious that tourism might be used as a tool for improving the infrastructure of a destination, which requires the involvement of various parties under government

guidance. For tourism markets, it is very essential to have an idea about who comes to visit an area or attractions it is easier to attract more of the same type of people than to reach completely new markets. There are a number of general trends, which need to be considered in the context of their impact on developing a strategic tourism marketing approach. Such as; economic and political changes overseas, published researched materials on growing or diminishing markets, technological developments, changes in leisure activities, increases in the number of short break holiday takers or increased demand for special (value-added) destinations.

6.6 Conclusion

Tourism is an interdependent sector. Tourism can provide benefits for both tourists and the host community. By developing an infrastructure and providing recreation facilities, both tourists and local people benefit. Tourism marketing strategies should be developed in a manner that is appropriate to the destination. It should take the culture, history and stage of economic development of the destination into account. Tourism marketing can be a tool to motivate governments to inject more funding in improving infrastructure, especially in the initial stage of tourism development. Many developing countries cannot afford to finance construction internally. Thus, the need for cooperation between public, private and foreign investment becomes essential. Tourism investment legislation in Libya should be treated as a special case in order to be more attractive to both local and foreign companies. However, the Libyan government should play a leading role in the development of the tourism industry, since the private sector may be small. Government involvement should include the provision of resources for marketing research and development, training and an improved services standard; transportation systems and infrastructure development, land zoning and preservation of cultural and environmental assets. In addition, without government involvement in tourism planning and marketing, development of the sector lacks cohesion, direction, and long-term sustainability. In the initial stages of tourism development, a great deal of finances is required for tourism infrastructure, facilities and other related services.

Moreover, there are a number of problems, which hinder the success of tourism development plans thus the tourism marketing strategies in developing countries-over-centralization of decision-making, difficult implementation, lack of comprehensive planning and flexibility. The chapter has highlighted that the main function of the

planning process lies between policy making, implementation and monitoring to assess performance. Modification of the plan where necessary is necessary for success. Involvement and action need to be taken at board level at the Libyan government through the GBT to collaborate with tourism-allied sectors is an urgent need to boost the country's tourism potential through new combined approach to tourism planning and marketing.

In addition, the new proposed framework for tourism marketing is required to attract tourists at national and international level by forecasting demand through regular marketing research. As a result, the need for marketing and promotional activities either by direct marketing through GBT and PTBs or by private tourism organisations has become essential. Furthermore, Planning within tourism marketing is the only possible way to assist achieving organisational objectives and growth as well as improving performance in a fast and ongoing changing tourism market. The next chapter will recommend further policies to validate this approach of tourism marketing in Libya.

7. RESEARCH CONCLUSION AND RECOMMENDATIONS

7.1 Introduction

Despite the diverse implications hindering tourism marketing in Libya, there is still a wide scope for the development of a modern and sustainable tourism industry in the country. Generally, this calls for the adoption of appropriate tourism planning and marketing strategies that the research has proposed in the previous chapter in order to integrate this important sector into the national economy. Therefore, marketing of tourism products should be combined with sustainable planning focus, which helps to fit in with the local environment and ensure its preservation. The successful formulation and implementation of a well-approached tourism marketing strategy is predicated upon the mobilisation of human, capital, physical and other resources. These resources spearhead and tourism in the country. This in return will ensure the identification of the tourism product, organise its marketing, and they are responsible for the overall control of the Libyan tourism sector into the national economy based on well-designed planning strategy. These resources if they are inadequate, tourism marketing will not succeed. However, in this chapter the researcher will recommend further policies to the related tourism authorities in Libya in order to achieve two main objectives. First, to overcome the identified problems which hinder the development of the tourism sector in Libya. Second, to validate the research findings or the implementation of the proposed new tourism marketing approach. Moreover, the chapter highlights some research limitations of this study and then some interested studies will be suggested for future researches.

7.2 Tourism Policy Recommendations

Libya is among several countries, which have introduced tourism as an attractive development option to sustain the national economy. At the national level, it is primarily government responsibility, to formulate a comprehensive tourism strategy based on many strategic elements such as tourism planning and tourism marketing frameworks. However, this strategy would be better implemented through the following recommended policies before transiting them into quantified targets and rates of tourism growth:

Policy One: Government's Commitment & Involvement

Government's commitment is a significant perspective of tourism development. Government usually provides the physical infrastructure necessary for tourism, such as roads, airports and communications. Adequate transportation infrastructure and access, to generating markets is one of the most important prerequisites for the development of any destination. In addition, it can attract both domestic and foreign investment, which will stimulate the economy. In other words, this means that government involvement in developing countries including Libya is a necessity especially in the initial stages of tourism development. The industry could not survive without them. Governments have the power to provide the political stability, security and the financial framework which tourism requires. In addition, an adequate budget for funding tourism projects and implementing tourism-marketing plans is an important factor for accomplishing successful tourism growth. Some tourism development plans were prepared to further tourism in the country. However, non-implementation of these plans mainly due to insufficient budget, in addition to some other reasons, was a major drawback to accelerate tourism development. Therefore, in order to achieve tourism growth in the country the government's involvement and commitment becomes essential to overcome any financial problems concerning the development of the tourism sector.

Policy Two: Total Community Participation

In order to provide the international tourism markets with a value-added touristic product that is economically, socially, environmentally, and culturally viable, the involvement of the community in tourism planning and marketing has become essential. Participation of all tourism stakeholders in tourism marketing, including local communities and indigenous people, during all phases of planning and management is essential, leading to the empowerment of locals, greater transparency and facilitating conflict management. Good tourism marketing plans should involve sharing of ideas between locals and planners. This kind of plan usually fits with communities' needs and they do not feel that these plans were imposed on them. Local people must be informed about the economic benefits of tourism development through using different means, perhaps through internal marketing and through education and training programmes.

Policy Three: Tourism Investment Projects

Investment in tourism infrastructure projects must be applied as soon as possible as it is a core factor for tourism development. This cannot be achieved unless the provision of physical infrastructure is completed. Developing a new tourism-related products or services, require intensified efforts at the initial stages in order to gain an adequate proportion of the international tourism market share and then to maintain this position in the medium to long term. In Libya, where tourism is viewed as an economic alternative for gaining economic growth, the government should make investment as easy as possible for prospective investors. Consequently, this could lead to an increase in the tourism market share and enable Libya to compete more effectively. Moreover, sufficient funding and establishing an appropriate atmosphere for investors that might boost confidence among them, is required to encourage local and foreign investment to invest in tourism-related services by treating tourism investment legislation as a special and more distinctive case in order to be more attractive. In addition, the development of more tourism accommodation such as small and medium-sized hotels, airports, railways, beach resorts, road motels and guest houses to meet the demand of prospective international and domestic tourists at a competitive price and more "value for-money" facilities could lead to sustainable tourism development and fast marketing promotion of the country as a new tourism destination. Similar investment policies in the oil sector, which has been very successful, could be adopted for investment for Libya's tourism industry.

Policy Four: Tourism Education & Training

Education and training is required for enhancing the skills of those working at all levels in the tourism industry, which is critical to its future prosperity. Training should be performed in a wide range of skills, including management, marketing and information technology. The industry needs skilled managers and marketers who are capable of identifying and meeting the needs of international visitors. In addition, there is a need to stimulate the demand for training by both employers and employees in the Libyan tourism sector. Furthermore, tourism training and studying facilities should be provided at school and university levels to produce better educational programmes directed towards planning, developing, management and marketing of tourism in Libya.

Policy Five : Tourism Marketing Activities

The need for marketing activities based on well-designed framework or strategy, which Libya is currently lacking, represents a core factor for achieving tourism growth in the country. In addition to awareness and knowledge about the Libyan touristic product and improving the image of Libya as an attractive tourism destination among international tourist markets, marketing plays a vital role in understanding the needs and desires of the actual and potential tourists. It is essential to respond quickly to the continuous changing demand of the international tourists and other external environmental conditions. This could be achieved successfully by offering the country's touristic products in a more attractive way than its competitors could as well as portraying the diversity of the Libyan touristic products in terms of society and culture, history and heritage while targeting specific segments related to individual types of activity or pursuit. As a result, regular marketing research becomes essential, particularly in a strongly competitive and fickle tourism market. In a country like Libya, which entered the international tourism market only a few years ago, there is a crucial need for marketing research, in order to capture adequate information about various tourism market segments. This helps in understanding the attitudes of actual and prospective tourists and keeping up-to-date with their personal needs, wants and desires.

However, in order to increase the awareness and image of Libya as a new attractive tourism destination, the researcher proposes the establishment of representing tourism offices abroad in major tourism generating countries (Italy, Germany, France, Austria, Spain, UK, etc). As a cost saving device or interim step, the London office for example, should be responsible for some other countries in the European Union. In the long-term marketing strategy, it will be essential to have an office in the USA, which would also serve Canada. The national Libyan Airlines' offices abroad and other local carriers also can be reached to promote the country's touristic product internationally. The importance of a destination having a foreign office lies in its ability to help travel agencies or tour operators abroad to influence the choice of the destination in various ways. Moreover, the need for foreign offices becomes more crucial when considering that those tourism organizations handle about 70% of travel packages worldwide.

Furthermore, Tourism planning and tourism marketing with a well developed institutional framework at various levels (national, provincial and local) are required to manage the existing resources to meet the international tourism market demand. A fully provisioned tourism marketing sections or departments with competent professionals have to be established immediately at all authorized Libyan tourism organizations (in the public or private sector), in order carry out such important mission for the country to introduce its assets in the tourism market and to the travel trade. As a result, the development of a sound marketing strategy which are missing in most of the Libyan tourism organization due to the lack of expertise have become essential for the co-ordination of marketing activities. In addition, before implementing any activity within the tourism sector in Libya, the formulated tourism marketing strategy should have vision, goals, objectives, action plans, time limits, budgets and monitoring system.

Policy Six: Tourism Product Diversification

Further to policy six discussed above, diversification of the Libyan tourism products becomes a necessity as modern tourism activity has shown a growing tendency towards it. Keeping pace with the rapidly changing and complex requirements of tourists in a highly competitive international tourism markets and allowing the emergence of new tourism destinations cannot be achieved without tourism product diversification combined with a high standard of tourism services and facilities. In fact, the image of Libya as a tourism destination is entirely based on historical places, desert and culture. Therefore, the opportunity for diversifying the tourism product exists. Libya can become one of the best sun, sea and sand destinations in the world, which requires heavy investment in beach resorts, hotels and sea sport facilities. Moreover, many other tourism resources such as business fairs tourism, treatment tourism, mountain trekking, marine-based activities, scuba diving, etc, are not fully exploited due to the lack of tourism services which could play a significant role in diversifying the country's tourism products. Those tourism resources might be helpful for Libya both in the short and long-term and could create more leisure and construction activities for other cities apart from the capital that may create community well-being and encourage settlement of people in rural areas who would otherwise prefer the urban areas for job finding opportunities. Moreover, referring to the international tourists visiting Libya's survey, the length of stay of these visitors is relatively short (See chapter five for more details). Therefore, in order

to encourage visitors to extend their length of stay, diversification of the tourism products has become a necessity. Other opportunities for visitors to consume can be encouraged by offering intensive tour programmes and preferential treatment for tourists. Since, practices such as; tax-free shopping, convenient payment systems (credit card machines etc), the provision of proper shopping facilities for incoming tourists, and the development of traditional souvenirs and gifts that are warmly received by visitors. Finally, Conferences or convention tourism is a major economic activity in most developed countries. After the lifting of UN sanctions on Libya, many foreign companies came forward seeking investment in various sectors (Constructions, telecommunication, etc). This encourages tourism organisations to organise professional events for those sectors, which require sufficient congress halls and facilities offered by hotels in Libya. However, the necessity of adopting convention tourism as a unique approach is obvious because of some key points, which are; generating large financial funds to the tourism sector and extending the tourism season to the whole year round. Let alone, using it as a tool for special marketing promotion and advertisement of Libya as an attractive tourism destination and gives an opportunity to the participants to experience various tourism products within the country. This in return, would encourage them to come back as ordinary tourists and conveying the same message to their friends and relatives abroad.

Policy Seven: Sustainable Tourism Development

To sustain and enhance to tourism industry in Libya, continuous improvement is always needed, as the country may face increased demand on its tourism products in the future. Whether the Libyan tourism market will be able to meet and take advantage of this increased demand will depend on how various tourism organisations both public and private cope with the existing tourism problems (explained in the previous two chapters) and take the necessary steps to meet the challenges of the future. Three important aspects should be considered carefully to achieve sustainable tourism development: The product's life cycle, the socio-economy and the environment. Problems arise when development is rushed taking little or no consideration of these three aspects.

However, In order to accomplish successful and sustainable tourism development, in addition to related-tourism infrastructure and tourism product diversification, the Libyan tourism sector needs continued improvement in marketing activities and tourism training programs to meet the continually changing tourism markets' demand. Tourism marketing

and other promotional activities will be indispensable if the Libyan tourism sector is to survive the high competition of established and emerging tourist-receiving countries in the region such as; (Egypt, Cyprus, Turkey, Tunisia, Morocco, etc). Finally, it may be said that the tourism industry will not achieve any improvement unless an adequate budget is devoted to well-developed tourism planning and marketing strategies.

7.3 Research Limitations

When carrying out this study, the researcher has observed the following limitations:

- The study used a questionnaire survey to seek the opinion of international tourists visiting Libya on different aspects surrounding the tourism sector. This method could have been further enhanced by conducting interviews with some tourism managers working at local tour operators or travel agencies. In return this would have produced a more reliable and robust test of the research hypothesis and provided additional validation for the instruments used to measure the marketing mix variables (product, price, place, and promotion). However, due to limited time- frame and obstacles of access to managers this considered unpractical.

- The sampling techniques used to collect data tried to eliminate as much as possible of the probable sources of bias, but this may not have eliminated the research bias introduced by the fact that some people did not respond correctly during the course of conducting the questionnaire survey or personal interviews.

- Time constraint and busy schedule of key tourism administrators during the period of conducting (face -to –face) interviews survey considered as a hindering element to increase the sample size to be more than seven administrators reached.

7.4 Proposed Work for Future Researches

To replicate the findings of this study and enhance the continuous growth of the Libyan tourism sector, further researches on the topic are suggested as follows.

- Marketing research should be conducted to identify the potential local and international market segments for each valuable tourism product in Libya with a critical review to match supply and demand components. S.W.O.T analysis for every attractive tourism area within the country is also needed to improve the existing tourism potential and discover the hidden resources for tourism growth.

- Research work has to be carried out to investigate whether the attitude, expectations, desires and satisfactions of domestic tourists are similar to or different from that of international tourists coming from abroad. As result of this study, it would be possible to establish a suitable tourism marketing strategy.

- A complete new research study to investigate whether coordination and cooperation between different tourism organisation such as (tour operator or travel agency, local hotels and national airlines), is needed essentially to reach the maximum utilisation of the tourism capacity in the country and satisfy tourists.

- Deep investigation studies on sustainable tourism development plans have to be continuously carried out by related tourism authorities or bodies in Libya. Such studies would be looked at the social and economical impact of tourism on the country or the environmental influence of tourism on socio-cultural aspects.

- Tourism Satellite Accounts (TSAs) as a new approach adopted recently by the WTO in order to find out the exact income contribution of tourism into each sector of the economy. Therefore, it is time now that TSA to be applied in Libya as countries like Canada and the UK has done so to vitalise their tourism industry.

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APPENDICES

Appendix (A): Questionnaire Survey

International Tourists Visiting Libya

1. How many times have you visited Libya during the last five years?

- Five time
- Twice
- Three times
- Four times
- Five times
- Six times

2. What are the main purposes of your current trip? (Tick any, which apply).

- Vacation/holiday
- Business
- Visit historical places
- Sunny beaches
- Desert
- Adventure
- Culture
- Good weather
- Value for money
- Fashionable destination
- Appealing local food (Cuisine)
- Interesting and friendly people
- Religion
- Others (Please specify)

3. What was the planning time involved in this trip? (Please tick one)

- Less than one week
- 1-2 weeks
- 3-4 weeks
- 1-2 months
- Longer than 2 months

4. What type of airline did you use to come here? (Please tick one box below)

- Libyan airlines
- International airlines
- Charter flight by tour operators

Other please specifies:

5. What source of information you used to organise this trip?(Tick any, which apply)

- Travel agencies
- Recommended by friends/relatives
- Previous experience
- Published source (e.g. brochures)
- Radio/TV Advertising
- News papers/Travel magazines
- Web sites
- Other (Please specify):

6. How did you make your travel arrangement for this trip? (Please tick a box)

- Package holiday booked through travel agent
- Package holiday booked direct from tour operator
- Independent holiday booked through travel agent
- Independent holiday booked through international airline

7. While you are in Libya, which of the following source of information have helped in your touring to visit the attractive tourism areas? (Tick any which apply)

- Own experience (been there before)
 - Local travel agencies
 - Local tourism information centres
 - Representatives of tour operators
 - Other (Please specify)
-

8. Please indicate how satisfied you were with the following aspects of your holiday in Libya. (Please circle the number that best describes your opinion).

A) Tourism Accommodation

Elements of perception	Very Dissatisfied	Dissatisfied	As expected	Satisfied	Very Satisfied	Do not know
Cleanliness	1	2	3	4	5	0
Quality of food and drink	1	2	3	4	5	0
Efficiency of service	1	2	3	4	5	0
Friendless of staff	1	2	3	4	5	0
Over-all value of money	1	2	3	4	5	0
Entertainment	1	2	3	4	5	0
Other (Please specify):						

B) Tourism Attractions

Elements of perception	Very Dis-satisfied	Dis-satisfied	As expected	Satisfied	Very Satisfied	Do not know
Beach resort	1	2	3	4	5	0
Historical interest	1	2	3	4	5	0
Culture shows	1	2	3	4	5	0
Water sport facilities	1	2	3	4	5	0
Night life	1	2	3	4	5	0
City tour	1	2	3	4	5	0
Other (Please specify):						

C) Local Tourism Services

Elements of perception	Very Dis-satisfied	Dissatisfied	As Expected	Satisfied	Very Satisfied	Do not know
Airport/Border service (Immigration)	1	2	3	4	5	0
Airport/Border service (Customs)	1	2	3	4	5	0
Restaurants	1	2	3	4	5	0
Personal security	1	2	3	4	5	0
Attribute of local people	1	2	3	4	5	0
Hygiene and sanitation	1	2	3	4	5	0
Communication services						
Desert facilities	1	2	3	4	5	0
Facilities offered at Tourist centres	1	2	3	4	5	0
Other (Please specify):						

D) Tourism Pricing Level

Elements of perception	Very Poor value	Poor Value	Satis- factory	Good Value	Very Good Value	Do not know
Air flight of Libya	1	2	3	4	5	0
Local transportation	1	2	3	4	5	0
Accommodation	1	2	3	4	5	0
Food and drink	1	2	3	4	5	0
General price of trip	1	2	3	4	5	0
Shopping	1	2	3	4	5	0
Other (Please specify):						

9. Do you think that you will comeback to visit Libya again?

- I think so/Yes
- Too early to know/Maybe
- I do not think so/No/Never

(Please rank the following most important reasons that discourage you from doing so)

- High cost of getting there
 - Uncomfortable accommodation
 - Untidy dirty beaches
 - Lack of variety of attractions
 - Little to do there
 - Uncomfortable roads for travelling
 - Lack of tourism information sources
 - Unfriendly people
 - Lack of hygiene
 - High prices generally
 - Visa entrance problems
 - Poor night life
 - Other (Please specify) _____
-

10. Please indicate: the following (for statistical reasons only).

(A): Your age category

- | | |
|--|---|
| <ul style="list-style-type: none"> • Under 25 years • 25-34 years • 35-44 years | <ul style="list-style-type: none"> • 45-54 years • 55-64 years • Over 65 years |
|--|---|

(B): Gender

- Male
- Female

(C): Marital status

- Single
- Married
- Divorced

(D) Employment status:

- Professional
- Management
- Self-employed/business owner
- Manual/worker
- Office worker
- Retired
- Unemployed
- House wife
- Student
- Other (Please specify)

11. We would appreciate any comments or suggestions to improve the tourism industry in Libya (Please write your comments below)

Appendix (B): Personal Interview Survey

General and Regional Tourism Administrators

Board name: _____
Respondent's name (optional): _____
Title: _____

Section One: Tourism Planning & Development

1) How do you view the development of international tourism in Libya?

2) Do you think that increasing number of tourists can be helpful to raise the standard of living?

Yes No Don't know

If No, please list the most important reasons for this negative answer?

3) To what extent do you think that the Master Tourism Plan (finalised ten years ago), been implemented to sustain tourism development in Libya?

- Up to 10%
- 11 – 20%
- 21 – 30%
- 31 – 40%
- 41 – 50%
- 51% and over

4) In your view, do you think that the development of international tourism in Libya could reduce the country's dependence on the oil factor?

Yes No Don't know

5) Do you believe that the financial funding presently offered by the Libyan government to the tourism industry is adequate?

Yes No Don't know

6) In your own view, what you think the major improvements need to be made to improve tourism related services, which will enhance tourism marketing in Libya?

- Improving international flights
- Improving accommodation
- Improving local transportation
- Improving communication
- Improving visa entrance system
- Improving security
- Others (Please specify):

Section Two: Tourism Issues and Problems

1) Have you observed any social and cultural impacts due to international tourism?
 Yes No Don't know

If yes, please specify the major cultural or social impacts in order of importance?

2) Please place the major tourism planning and marketing problems in order of importance, which hinder the tourism development in Libya?

- Inadequate budget
- Mismanagement
- Lack of expertise
- Lack of human resources
- Lack of investment
- Others (Please specify):

Section Three: Tourism Potential

1) How do you evaluate the present tourism potential of Libya as an attractive tourism destination?

Very poor	→	→	→	Excellent	Don't know
1	2	3	4	5	0

2) In your opinion, what is SWOT of Libya as a new tourism destination?

- Strengths_____
- Weakness_____
- Opportunities_____
- Threats_____

Section Four: Tourism Marketing

1) Do you have any kind of marketing section or department in your organisation or any other foreign offices established to represent your interests abroad?

Yes No

If yes, which of the following do you have?

- Independent marketing section or department.
- Combined with other functions or departments.

2) In your opinion, what is the best marketing policy to promote Libya abroad

- Tourism brochures sent to tour operators/travel agents abroad.
- Tourism brochures sent to Libyan diplomatic missions abroad.
- Advertising in media abroad (e.g. the Internet, magazines etc).
- Brochures and information sent to foreign missions in Libya.
- Joint promotional activities with tourism organisations based abroad.
- Others (Please specify):

3) Do you produce any marketing plans or strategies for tourism?

Yes No

If yes, please indicate below the objectives of your marketing plan or strategy:

4) What is your marketing planning strategy towards international tourism markets?
(Please indicate in the space below).

5) Is your tourism board in the course of its provided promotional activities particularly interested in any market segment?

Yes No

If yes, please indicate in the space below which segment/s.

6) Do you undertake any tourism marketing research?

Yes No

If yes, please indicate how often and is the budget devoted for this purpose adequate?

7) Do you think that, the prices presently charged for transportation, accommodation and other related services are "value-added" and competitive?

Yes No Don't know

8) Rank in order, you major tourism competitors in the regional or international tourism markets and what kind of advantages do you have over them.

- _____
- _____
- _____
- _____

Advantages you have over them:

9) Further comments or suggested polices you think if they are adopted by the related tourism organisations, the tourism industry in Libya will be improved.

Appendix (C): General Research Comments & Suggestions

(1) Comments by International Tourists Visiting Libya

An open-ended question at the end of the questionnaire invited tourists to express their views of Libya as a holiday destination. Some of their remarks are represented in the following points:

Some Good Points Regarding Hospitality and Tourist Potential

- "We had a great time in Libya; find it a very interesting and hospitable country"
- "The historic sites are magnificent" "Leptis Magna is the best preserved Roman sites we have seen"
- "Thank you for a great visit to your fascinating country"
- "Good potential"
- "Good tour leaders"
- "Friendly people and staff"

Critical Points Made by Tourists Regarding Improving Tourism Facilities (Cleaning and Hygiene)

- "A clean up campaign could make a real difference"
- "Waste and trash beside the highways need to be removed"
- "Road signs in English or French should help"
- "Improve hotels quality. Regular maintenance is really necessary in the rooms and bathrooms"
- "Hotels should be graded according to the international standard and regulations"
- "High prices generally" "More small and medium-size hotels, more modern restaurants, more cafes and improve nightlife, and investment in beaches"
- "Need experienced people to deal with tourists; well trained in languages"
- "Foodstuff served in hotels should be improved. Service in this field should be up to the standard"
- "Need more beachfront facilities and more tourist focus at historical sites"

- "Payment system - credit card machines, credit cards acceptance is a critical issue"
- "Improve toilet facilities and hygiene"
- "Improve the quality of transport to desert"
- "The timing of international flights should be more accurate and Improve domestic flights in terms of services and more routes"
- "Reduce the number of check stops and easiness of checking procedures" "Easier visa regulations and border checking procedures"
- "Infrastructure needs to be addressed as soon as possible"

From the above comments, it can be noted that despite the magnificent historical, cultural and scenic appeal to attract international tourists, there is a lot to be done for Libya as a tourist destination to meet international tourist market requirements. There are several issues, which need to be addressed for the country to compete on the international level. Infrastructure is considered to be at the top of the major issues that should be addressed as soon as possible, starting with the main cities and extended to include the urban and rural areas in the long-term foreseen future.

Hygiene and cleanliness levels were other concerns, which got the attention of the majority of respondents. Historical sites, besides roads and beaches were other tourist attractions addressed by respondents in terms of cleanliness and hygiene. In order to overcome this problem the Board of Tourism in Libya must co-operate with the environment cleaning authorities and other associated personnel in the country in order to organise a cleaning campaign throughout the country.

Moreover, other comments regarding tourist services and facilities were addressed by the respondents. These include: The increase of small and medium-sizes hotels in the main cities and close to the tourist attractions to provide enough rooms for tourists all reduce prices which were a real concern among several respondents. Improving the services of international flights and reducing flight fares to be more competitive. This may discourage international tourists using other airlines or travelling via borders. In order to avoid or reduce car use to travel to tourist . Attractions based in the desert,

domestic flights also need to be more handy for tourists. More domestic routes and airports should be established. Finally, visa regulations, human resource training, nightlife activities, checking procedures at airports, borders and check points should be reviewed.

(2) Comments by the Tourism Boards' Administrators

An open-ended question was directed to the interviewees about further prospects of Libya's tourism industry. The view expressed was that the provision of tourism infrastructure and services are essential to facilitate tourist demand. Tourism educational programmes for inhabitants by various advertisement tools should be provided. Human resources for tourism should be highly concentrated in terms of education and training programmes and exchange of tourist experiences with distinctive tourist destinations in the region are required. Investment and expertise by private domestic and foreign sectors are required to boost the tourism potential. Government intervention is essential to sustain tourism development financially and to facilitate investment regulations for local and foreign investors. However, it was a common feeling of interviewees that standards of hygiene and non-availability of amenities and tourist facilities at some tourist areas discourage tourists to repeat their visit to the destination. Therefore, more care must be taken to improve tourist facilities and services. Air transport services should be improved, as it is an important mode to generate tourist traffic for the country. An effective marketing and promotional campaign for the available tourist potential in the country is a major factor for achieving success. Furthermore, some suggestions regarding the improvement of tourism sector were given by the interviewees such as; the establishment of a tourism bank to encourage local investors to invest in tourism related services; opening doors for independent tourism whilst taking necessary steps against any social and cultural impacts; the stability of the exchange rate for foreign currencies against the Libyan diner; and finally the implementation of the (1998) Tourism Development Master Plan (TDMP).

(3) S.W.O.T. Analysis of Libya as a Tourism Destination

Respondents were asked to identify the strengths, weaknesses, opportunities and threats of Libya as a tourism destination, the following findings are concluded according to their experience:

❖ Strengths

Climatic conditions of Libya vary from one part of the country to another. The mean daily temperature does not fall below 5 degrees. Summers are relatively hot with the hottest month being August. Mean monthly temperatures during this period do not exceed 30°C-40°C (WTO, 1998). This kind of climate has the ability to offer Libya as whole year around destination. The country has an extensive and mixed range of tourism resources that are spread widely throughout the land area of the country. These include the desert, historic towns and cities, beaches and sea, the mountains, classical archaeology and other tourist resources, such as health tourism, scuba diving and religious tourism. These tourist attractions are located in different regions throughout the country. Moreover, significant new discoveries of prehistoric, early Libyan and classical remains and handicrafts are still being made. Consequently, these new discoveries will definitely strengthen further the historic resources of the country. In addition, Libyan people are characterised by pleasant hospitality. The tourist survey in Chapter Six, (See Table 6.6) demonstrated that, the attitude of local people towards international tourists and personal security, which represent critical factors in some other destinations achieved a satisfactory response from international tourists. Therefore, tourists will be encouraged to repeat visits as well as prolonging their length of stay.

❖ Weaknesses

Although, the country is bestowed with natural and man-made attractions, lack of investment in infrastructure, the substandard facilities and services offered are inadequate. In addition, some of these attractions are not fully exploited, due to the lack of tourism facilities and services in these areas. In addition, many tourist areas of Libya are not yet fully explored, and even known features are not fully documented. There is a lack of available accommodation in terms of both quantity and quality of service in or close by the principal attractions, such as classical archaeological sites, selected coastal

areas and convenient desert stopover points suitable for international tourists. In addition, the facilities in some attractions lack road signposting and informative signposting at places of interest that are in languages other than Arabic. In, there is real shortage of road maps of Libya as well as detailed ones for the principal towns and cities. In addition, there is a need to improve the existing information centres at the site areas and establishing more information centres in the main cities, which can be of great help to international visitors. Despite the large number of restaurants, there are only a few that are of an acceptable standard to international tourists. Besides that, there is little or no entertainment or cultural activities organised for presentation to visitors. In addition, the availability of Libyan souvenirs and handicrafts in general, and those of good quality in particular are lacking. Consequently, the shortages of these facilities will definitely have its negative impact on the level of tourist demand. The negative image of the country as a tourism destination held among the European tourism markets resulting from western media attitudes in the 1980's and early 1990's might be other factor causing the delay of international tourism growth. In addition, there is a lack of awareness and knowledge in the international markets, by prospective tourists, due to the lack of effective promotional campaigns. Inadequate budget and lack of expertise were a major reason for ineffective promotion or tourism marketing at international level to sell Libya's tourism product.

❖ **Opportunities**

Tourism in Libya should not be viewed only as a significant contributor to the national economy but as a reflection of the Libyan's national image as a tourism destination throughout the western world, which represents the largest generator of international tourism. In addition, the lifting of the UN air embargo recently is an important factor in the future development of tourism in Libya as, in air-flight terms; it is situated close to this particular market. Moreover, in the future, Libya has the opportunity to develop the general interest touring-circuit markets in different parts of the world such as North America, East Asia (especially Japan and Korea) and Australia. However, the potential of the Libyan tourism products exists in various areas. Beside these markets, there are the markets of scuba diving, spa tourism, marine-based activities (e.g. game fishing, flotilla sailing) and fairs tourism. Business tourism is emerging as a powerful economic segment of the industry throughout the world. Especially after lifting the UN embargo, opportunities exist to utilise facilities in the country, organised efforts

to conduct conferences, meetings, conventions and exhibitions, leave much more room for development. In addition, Libya has introduced tourism as an attractive developmental option to sustain the national economy, which for many years has been bolstered by the oil factor. Therefore, this recognises that ongoing economic diversification opportunities represented by the development of the tourism sector and its integration within wider economic planning, could sustain the national economy.

❖ **Threats**

There is no proper well-defined principle to develop tourism on systematic and orderly lines. The personnel in the tourism sector keeps changing, which results in different policy ideas for the development of tourism. It is a severe threat to ongoing projects to stop funding or delay the execution of tourism developments or marketing plans. Sometimes inadequate capital does not allow the completion of a project. Moreover, it has been observed that many of the potential tourists prefer to travel for beach tourism, and this segment is almost absent in Libya due to the lack of tourism facilities and services, which may give more credit to competitors. Some of the administrators indicated that, as tourists increase, the need for improving the level of security became essential. In their view, the best way to avoid this problem is to increase the number of tourism police personnel to offer the safety and security to international tourists. In addition, one of the administrators observed that the internal marketing, to educate local people about the benefits of tourism to the community and how they should interact with tourists, is considered poor.