



THE BUSINESS SCHOOL

**An Investigation into the Current State of International  
Conference Tourism in Saudi Arabia and an Assessment of its  
Future Development Possibilities**

Submitted by  
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## ABSTRACT

This research study aims to assess the potential for Saudi Arabia to become an international conference destination. Faced with problems created by rising unemployment, a rapidly growing population, and fears over dependence on petroleum output and price, the kingdom is currently looking to develop new sources of employment and national revenue. Having joined the World Trade Organization in 2005, Saudi Arabia is committed to liberalizing its markets and opening to foreign participation by creating investment and business opportunities. Developing an international conference sector is considered a potentially suitable way to meet the current domestic and international imperatives to change and the challenges these present.

The growth of new markets and international conference destinations in a globalizing economy is leading to increased research. However, the field is still young: there has been limited attention paid to the perspective of delegates and much of the research has been concerned with western destinations. As no other study has been carried out into the potential of this sector in Saudi Arabia, or the Gulf region, this research makes an original contribution to knowledge.

A mixed methods approach was adopted to explore and assess both the practical capacity of the country to host international conferences and the socio-political context that might impact on this development. The primary sources of data were officials in the field and visiting delegates, whose views and knowledge were obtained through the use of both quantitative and qualitative methods (through a questionnaire and interviews respectively). The results are integrated in the final discussion.

The findings indicate that, although Saudi Arabia has the practical capacity to host international conferences, the effects of an ambivalent attitude towards opening up to the outside world – expressed through a number of factors embedded in the socio-political situation in the kingdom – has led to an impasse which is blocking development.

## **DEDICATION**

This document is dedicated to my husband - for his support and for the willpower to succeed that he instilled in me - and to my children who have supported me unconditionally.

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## LIST OF ACRONYMS

ADNEC	Abu Dhabi National Exhibition Centre
ADTA	Abu Dhabi Tourism Authority
BECA	Business Events Council of Australia
CHRIE	Council on Hotel, Restaurant and Institutional Education
CIC	Convention Industry Council
DICEC	Dubai International Convention and Exhibition Centre
GIBTM	Gulf Incentive, Business Travel and Meetings Exhibition
GITOF	Gulf Investment and Tourism Forum
GCC	Gulf Corporation Council
GMEC	Gulf Meetings and Events Conference
HSCT	High Supreme Commission for Tourism
IACVB	International Association of Convention and Visitor Bureau
IAEE	International Association of Exhibitions and Events
ICCA	International Congress and Convention Association
ICT	Information Communication Technology
JEF	Jeddah Economic Forum
JMIC	Joint Meetings Industry Council
KSA	Kingdom of Saudi Arabia
MICE	Meetings, Incentives, Conferences and Exhibitions
MPI	Meetings Professional International
OBB	Organizational buyer behaviour
PCMA	Professional Convention Management Association
SAGIA	Saudi Arabia General Investment Authority
TSA	Tourism Satellite Account
UAE	United Arab of Emirates
UIA	Union of International Associations
UNWTO	United Nation World Tourism Organization
WTO	World Trade Organization
IAMM	International Associations Meetings Market

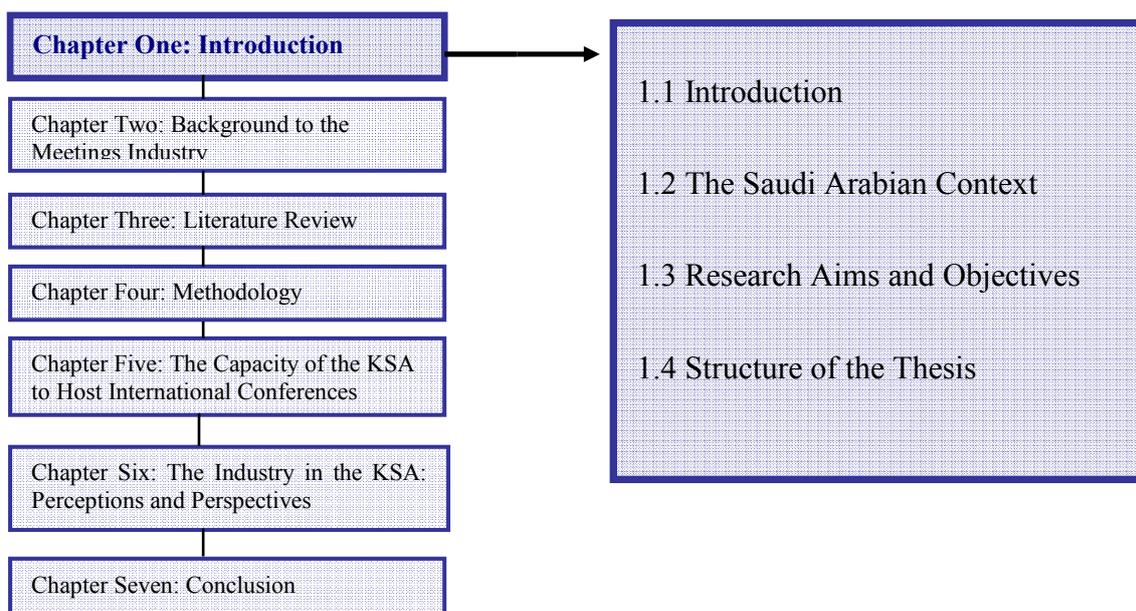
## CHAPTER ONE

## INTRODUCTION

**1.1 Introduction**

Saudi Arabia is currently seeking to address the economic vulnerability it experiences as a result of its reliance on one main (and volatile) economic source – oil. In a time of great pressure to change brought about by a rapidly and dramatically growing population - and the resulting increase in demand on the deteriorating housing and services infrastructure, and, significantly, the resulting increase in unemployment - it faces the imperative of creating alternative sources of revenue and employment (Okruhlik, 2002; Rice, 2004; Malik and Niblock, 2005; Clatanoff et al, 2006). This thesis considers one such possible source - the conference tourism industry - and aims to assess the potential of the country to develop as an international conference destination. This chapter will lay the basis for the thesis. Before looking at the aims and objectives of the research, it provides political, social and economic background information about the Kingdom of Saudi Arabia, and the challenges it is currently facing, as a way to contextualize the study and provide a rationale for the author's choice of focus. Figure 1.1 below shows the basic structure of this chapter within the structure of the whole thesis.

Figure 1.1: Structure of Chapter One within the Thesis



## 1.2 The Saudi Arabian Context

Saudi Arabia, in its international roles as ‘swing’ oil producer<sup>1</sup>, ally of the West in the Gulf, and guardian of the holiest sites of Islam, has, over the last decade particularly, faced increased tension over issues of change in response, or reaction, to the international system around it changing. This tension, according to Aarts and Nonneman, ‘intertwine[s] with the dilemmas being faced at the domestic level’ (Aarts and Nonneman, 2005:9).

Saudi Arabia is an extremely conservative country whose government and many of whose citizens insist on the preservation of its religious values and ancient traditions. At the same time, there is evidence of an ‘ultramodern and high-tech’ lifestyle enjoyed by its citizens (Rice, 2004: 60). According to Freeman, moderating at the 20<sup>th</sup> Middle East Policy Council Conference on February 1<sup>st</sup>, 2000, Saudi Arabia is ‘the only place on the planet that was never penetrated by Western missionaries, militaries, or merchants’ (Klein et al., 2000: 4); clearly this is in reference to the period of western colonialism, rather than to the entire history of the territory. Freeman asserts that because of its history and oil wealth, it has, so far, been able to play by its own rules with regard to investment and foreign trade.

At the Symposium for the Accession of Saudi Arabia to the World Trade Organisation (WTO), Kestenbaum, former regional director of the US Department of Commerce, discusses certain characteristics of the Saudi culture and economy which he believes are likely to impact on its openness, or otherwise, to change as well as on the speed at which that change might take place (Clatanoff et al., 2006:8). He describes the structure of society as being based on ‘a rigid, hierarchical system of birth and tribal relationships’, which has been overlaid on Bedu ethics which are egalitarian and ‘fiercely independent’ in nature (Clatanoff et al., 2006:8). Rice says that the Bedouin tribal heritage ‘means that values such as loyalty, justice, generosity and status are important in Saudi society’, and points to the emphasis on status as impacting on the way business is carried out, in an ‘authoritarian, top-man culture’ way which leads to great conformity and deference (Rice, 2004:73). The hierarchical nature of society is reflected to some extent in the ‘large sense

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<sup>1</sup> A country which extracts more oil than it consumes, and that can pump extra amounts to meet world demand.

of monopoly in the Saudi economy' (Kestenbaum in Clatanoff et al., 2006:8). Despite the fact that the existence of these tribal relations as well as the overlay of Islam means Saudi Arabia is not an absolute monarchy, it is, nevertheless, a monarchy and Kestenbaum says that like any monarchy, it has privileges and a sense of entitlement in certain areas, including the economy (Clatanoff et al., 2006:8).

Freeman, at the above-mentioned Middle East Policy Council Conference, argues that, within the context of Saudi Arabia joining the World Trade Organisation (henceforth the WTO) and its impact on both Saudis and foreigners living or doing business in the country, the fact that power (and privilege) is held by those with wealth or title can create problems within the economy (in Klein et al., 2000: 4). The values underpinning the hierarchical and monarchical structure of the society mean that any outside 'interference' in how the country is run can be seen as an intrusion on the ruling family's sovereignty and greatly resisted. More conservative government forces view foreign investment, for instance, as leading to a dilution of national control, and liberated markets as introducing an unwelcome economic democracy; this attitude can mean that implementation of economic reforms can be blocked.

Kestenbaum pointed out that for the last 25 to 40 years, the kingdom had protected its own markets and access but had had 'open and easy access to everyone else's ...' (Clatanoff et al., 2006:8). This sense of entitlement, he explains, also entails a sense of responsibility – 'if you own everything, you have to take care of everything' (2006:9) - which has led to the creation of a welfare system in which everything (although he only points to education and healthcare) is free; a situation which is counter to the free market principles promoted by the WTO. Added to this is the situation of women in Saudi Arabia with regard to employment; women are limited in the kind of work they can carry out and limited by not being permitted to drive. Rice (2004: 75) states that 'public life is the exclusive domain of Saudi men' (women are still segregated from men in almost all areas of life) but that, although traditionally, women have not participated in mainstream business, they are attempting to play an increasing role in the workforce in areas such as education and business. Women now own 5% of registered Saudi businesses, but need to use men to conduct them. However, resistance to women moving away from traditional roles is strong, and Haddad and Esposito assert that it is in the area of the status and roles of women that the force of tradition is felt most strongly and the clash of civilizations is

most apparent Haddad and Esposito, 1998:ix). They claim that western values of freedom, equality and self-determination are interpreted by some as an indictment of Islam and a threat to the Muslim family and community, an interpretation which underlies the force of the attitude towards maintaining traditional roles for women.

Possibly one of the most influential factors affecting Saudi society, culture, politics and economy is Islam. Saudi Arabia is the centre of Islam: the Kingdom acts as the guardian of Islam's Holy places and is the place towards which Muslims throughout the world turn in their daily prayer. Saudi Arabia adopted the Holy Qur'an and the Sunna (sayings and teachings of the Prophet Muhammad) as the basis for its constitution. To understand Saudi Arabia, according to Aboulfaraj, it is essential to realise that Islam permeates all aspects of Muslims' lives and every aspect of the Saudi Arabia state (Aboulfaraj, 2004). The Sharia (that is, Islamic Law, which is the source of law in Saudi Arabia) has a tremendous influence on everything and, therefore, on the extent to which change is permitted to happen.

Within this context (a country governed by a monarchy, structured hierarchically, grounded in traditional and religious values, accustomed to being a law unto itself and having almost total autonomy economically) it is now possible to delineate some of the major challenges being faced by the kingdom at present. Possibly the most urgent threat to the stability of the country is that the Saudi economy is largely dependent on petroleum output and its price. This reliance on one main source of income means that one of its most important goals is therefore economic diversification, so that it has 'an economy that will be viable when oil revenues decline' (Malik and Niblock, 2005:102). Coupled with this issue, as Clatanoff points out, is the 'population bulge' being experienced by Saudi Arabia (Clatanoff et al., 2006:15). Sager says that the high population growth rate for the period 1980 to 1997 was estimated at 4.4 per cent annually and points to the problematic effects of this as being the 'tremendous economic pressure it generates' by decreasing per capita income automatically unless there is extremely high economic growth, and by straining infrastructure and social services (Sager, 2005:239). He notes that 55 per cent of the 'demographic pyramid' comprises teens and young people and refers to social scientists' talk of a 'youth explosion' (Sager, 2005:238).

This situation, and the necessity for a robust economy to address it, is further complicated by very high levels of unemployment. Malik and Niblock suggest that estimates putting the rate of unemployment in 2002 at 9.6 per cent (government data) or 11.9 per cent (the Saudi American Bank) were still very low, and that a more accurate figure would be 15 to 20 per cent among the male population, and possibly, according to some unofficial reports, as high as 30 per cent overall (Malik and Niblock, 2005:102). Augmenting this particular issue is a situation in Saudi Arabia in which students have been educated to do professional work, particularly within the government sector, and the non-professional, or blue-collar jobs, have been filled by workers from abroad (who are most often paid less), creating a situation in which almost a third of the entire Saudi population comprises non-Saudi workers and the low levels of unemployment amongst this group contrasts markedly with the high levels among the Saudis. Not only is the government faced with the challenge of creating jobs, it also needs to address the issue of attitudes towards low status work.

Malik and Niblock propose that in order to meet the challenges of creating a more diverse economy to guard against reduced oil revenues and of providing productive employment for the growing population in Saudi Arabia, a higher level of both public and private investment is necessary, some of the latter necessarily coming from foreign investors (Malik and Niblock, 2005:102). Saudi Arabia's accession to the World Trade Organisation in December 2005 has indeed opened the door to foreign investment and it is clear that their reason for wanting to join was based on the need to create jobs. As Clatanoff said:

‘I think it is beyond doubt that the one reason the Kingdom of Saudi Arabia so much wants to undertake an economic liberalization and expansion that's dictated by WTO terms is for employment generation. They're in it for the jobs.’  
(Author's emphasis) (Clatanoff et al., 2006:15)

The most important effect of joining the WTO (indeed, of the whole process of meeting the demands placed on it before it was accepted as a member) was that Saudi Arabia needed to liberalize its markets (working to ensure far greater transparency in its import process system, for example, and allowing foreign ownership and investment) and restructure its legal regimes (now with new banking laws, for example) in order to create

a more balanced economy which would be open to foreign participation and which would provide greater opportunities for a range of business interests to be developed by both Saudi and non-Saudi business people. Tourism was one sector considered to have the potential for development and to be capable of meeting a number of needs: initially, it would demonstrate to the WTO an openness to the outside world; the development of tourism infrastructure would lead to an increase investment opportunities; it would be possible to target select groups - not the 'culturally undesirable' (Sharpley, 2002:221); and it would encourage Saudi nationals to remain in the country for their holidays (thereby ensuring that at least some proportion of the huge amounts of money spent on leisure tourism outside the country remain within it). Most importantly, it would lead to the creation of much needed jobs.

In considering the development to date of this sector, and in order to show how significant this opening up of the country to tourism is, it seems necessary to contextualise it. Prior to its formal introduction, tourism was 'off-limits to private sight-seeing travellers not from the contiguous countries' (Okruhlik, 2002:5); visitations to the country could only be for religious purposes, for employment purposes, or for the purposes of visiting friends and relatives. Even within the country, long-standing regulations against mobility and travel, aimed at ensuring appropriate conduct within the country, held sway: any foreigner living in the country needed a 'sponsor', who would take responsibility for the legal, financial and social behaviour of the visitor (making sponsorship very difficult to attain); foreign workers could not travel more than 50 kilometres from their place of work without written, signed and dated permission of their sponsor; and tourist visas did not exist (Okruhlik, 2002:5).

The introduction of tourism therefore necessitated major changes, which can be seen in the formation of certain policies and an administrative framework. The establishment in 2000 of the High Supreme Commission for Tourism (HSCT) - with its aims of fostering tourism and encouraging investment in the sector - followed, in the same year, by the establishment of the Saudi Arabia General Investment Authority (SAGIA) - serving as a 'one-stop shop for licences, permits and other administrative procedures relevant to business' as a means of attracting foreign investment and serving the interests of the business community (Malik and Niblock, 2005:87) - symbolise the significance of the move from the kingdom's previous stance on tourism. The 20-year-plan for the

development of tourism, announced in September 2003 by the secretary general of the HSCT, further demonstrated the commitment to this sector in its envisaging of the employment of as many as 2.3 million Saudis by 2020.

Many initiatives have been taken to develop the provision of tourist experiences in Saudi Arabia: its many tourism resources (natural attractions, including deserts, mountains, and the Red Sea for diving, as well as archaeological, cultural and heritage sites) have been exploited; visa regulations have been somewhat relaxed; a system for officially accrediting and licensing travel agents and tour guides has been initiated. Having said that, there are still many obstacles to the country completely opening up to the outside world (for all the reasons listed earlier in this discussion) and to the ‘West’ in particular. As Henderson points out, for many Middle East societies, western-style tourism is considered to be fundamentally incompatible with the Islamic religion and way of life, which, for example, prohibits alcohol, certain foods, sex outside marriage, all of which might possibly be expected to be part of a holiday (or, at least, not frowned upon) by western tourists (Henderson, 2003). As Okruhlik points out, there are no public entertainment venues, clubs, cinemas and no dancing in the Kingdom and the kind of tourism being promoted is what Saudi officials refer to as “clean tourism”, travel which does not involve negative aspects such as gambling, casinos, alcohol or prostitution (Okruhlik, 2002:8). Visa regulations do still exist and are used as a means to control who visits and, therefore, to ensure that cultural traditions are not threatened. Visas are available to citizens of only 66 other countries and one of the main restrictions on being granted a visa is based on gender: women have to be aged 40 or over before being granted access and need to be escorted by a male when travelling (Oxford Business Group, 2008). Again, this draws attention to a cultural incompatibility: in Saudi Arabia, women are kept away from the gaze of strangers and men are required not to look at women from another family (Burns, 2007: 230). Women visiting from non-Muslim countries would be expected to respect these requirements, and to respect the dress codes for women, practices they will probably be unfamiliar with and possibly feel hostile towards.

Because of these obstacles, it seems that the country is being circumspect with regard to targeting visitors from outside the Middle East Region, as yet preferring to remain focused on religious tourism and regional tourism. The fact is, however, that the High Supreme Commission for Tourism has stated commitment towards the development of

the meetings industry. In 2005, the Chairman of the HSCT stated that ‘We plan to promote business, conference and medical tourism to go alongside Umrah [general religious pilgrimage] tourism’ (Ramkumer, 2005) and an official statement issued by the Commission asserted that:

‘The Commission is planning a strategy to develop and market this important segment of tourism, in cooperation with a concerned committee set up by the Board of Chamber of Commerce along with the private sector. The aim is to stimulate tourism in this sphere through a number of target activities, including commercial and industrial exhibitions, art exhibitions, academic conferences and symposiums, in addition to providing special tourist programs to accompany these events.’ (HSCT, 2006)

In the context of the above discussion of Saudi Arabia’s situation, and the urgency of the problems it is facing, on one level it can be seen that the development of the conference tourism industry could be highly beneficial ‘as a catalyst to general growth and means of diversification’ (Sadi and Henderson, 2005:2): it would provide a viable alternative economic source, providing a year-round source of high-yield tourism, encouraging foreign investment, and creating opportunities for people to visit the country and develop business contacts: and it would create employment. On another level, however, it is clear that there are substantial barriers to developing the industry, not least because selling to non-Muslims internationally is more challenging due to matters of cultural sensitivity and security. What seemed necessary was an exploration of how feasible it would be to develop this industry in the current situation. Despite the obvious benefits to be gained from developing the industry as well as the intentions of the kingdom to do so (as seen in the establishment of the HSCT and in its official statements of intent), no study has yet been undertaken into the factors that might support and hinder this development, particularly in the light of the current domestic and international imperatives to change and the challenges that these present. This thesis does not assume that the KSA shares similar challenges to those of other Gulf, or Middle Eastern, countries, or indeed that it shares the same attributes. Rather, it attempts to distinguish what is particular to Saudi Arabia.

### 1.3 Research Aims and Objectives

The aim of this research study is to assess the potential of Saudi Arabia to become an international conference destination. As yet, this industry is at an immature stage in its development, and the intention is to search for and uncover any element or factor which may have an impact on whether it becomes established and to use these in the final assessment of the kingdom's potential. Research into the meetings industry illuminates a number of factors, themes and processes that can influence the success or otherwise of a destination; in this research, the capacity and potential of the KSA to become an international conference destination is measured to some extent by the degree to which these might impact on the development of the industry there, and to some extent by how they interact with other factors that are pertinent to the Saudi context.

Saudi Arabia's potential will be considered from two perspectives: internal and external. With regard to the internal perspective, this will be gained from officials working within government bodies whose remits involve the organization and administration of the meetings industry. These officials are expected to have a detailed understanding of the current state of the industry, of the plans and strategies in place for developing it, and of any obstacles and difficulties that might hinder its development. Because there is a lack of documentation providing information on these areas, the officials are the only possible source of internal information. With regard to the external perspective, this will be gained from international delegates to conferences in Saudi Arabia. As the success or otherwise of a conference destination depends to a large extent on how it is perceived and evaluated by those attending meetings there, the attendees are an essential source of data (and, as will be discussed in chapter three, there has been a distinct lack of research carried out into this area). Conference attendees could even be seen as the *source* of the potential for a destination to succeed. In this study, it is anticipated that the delegates' experience of international conferences will inform their evaluations not only of the conferences they attend in Saudi Arabia, but of the entirety of their experience there, including the image they form of the country; their attitudes, opinions and perceptions will shed light on strengths and weaknesses of the country as an international conference destination. The fact that they are attending actual conferences means the information they give will be based on immediately relevant experience.

A further dimension to this research study is the inclusion of data gained on the state of the conference industry in the United Arab Emirates. The meetings industry is a relatively new industry in the Middle East and, among the Gulf countries, the United Arab Emirates is one country that has succeeded in establishing itself as an international conference destination (see 2.4.2.iii). The UAE and the KSA to a large extent share many characteristics: they have similar cultures, religions, climates, are in similar locations, and are both wealthy countries targeted for foreign investment. The researcher felt that gaining insights into the situation in a country that had recently established the industry would shed light on what factors had helped them succeed that might also be relevant to the KSA - and on what might act as a hindrance to the development in the Kingdom. Similarly, it might also bring to light factors that the KSA might be in possession of that were particular to it and that might therefore add to (or detract from) its potential to succeed. These factors might not have been so easily distinguishable if only Saudi Arabia had been studied. In order to be able to analyse and explore the data sets from both countries side by side, similar samples were chosen in the UAE as were chosen in the KSA (both officials involved in the administration and organization of the industry, and international delegates attending conferences there) and similar methods (questionnaires and interviews) were used.

Taking into account all of the above, therefore, the aim of this thesis is to assess the potential for Saudi Arabia to become an international conference destination. More specifically, the study has three major objectives, and associated research questions, namely:

1. To assess the capacity of Saudi Arabia to host international conferences
  - 1.i What is perceived as being positive / negative about current provision of international conferences in the KSA?
  - 1.ii How is the capacity of the KSA to be an international conference destination perceived?
2. To explore the social and political feasibility of the Kingdom of Saudi Arabia developing as an international conference destination



The following chapter, chapter two, provides an overview of the meetings industry, both generally, and specifically (with regard to the Middle East, Saudi Arabia and the UAE in particular). It begins with a brief description of the industry and its development to date, and considers reasons for the lack of reliable data on the current state of the industry. An overview is then given of the global development of the international conference industry over the past two decades, taking into account major issues and trends. The meetings industry in the Middle East is then considered: this part concentrates on the state of development of the industry in Saudi Arabia and the United Arab Emirates, the two countries being focused on in this research.

In the third chapter, the focus shifts to a review of the literature on the meetings industry as a way to inform understanding of the factors relevant to the development of the industry, generally, and which of these might impact on whether or not Saudi Arabia has the potential to be an international conference destination. Research into the factors influencing both the site selection process and the conference attendance decision-making process is reviewed as a way to understand the different factors that might influence the choice of a conference destination.

Chapter four describes and assesses the research design of the study, focusing on the research aim and objectives, looking at the methods applied by the researcher to achieve these, and giving a detailed analysis of the fieldwork. The chapter begins with an exploration of the mixed methods approach to research. The four conferences used in the study are then described before the quantitative and qualitative methods of data collection and analysis are explained in detail. An account is given of how the two fieldwork methods were integrated in the final analysis and, finally, the quality of the data, and the extent to which it met the aims of the study, is discussed. This chapter prepares the ground for the following three chapters, in which analysis and discussion of the data are carried out.

Analysis of the data gained through the use of a questionnaire completed by delegates at the four conferences is carried out in chapter five. Part one provides demographic information on the respondents, and part two considers their experience of international conferences and the characteristics of Middle East destinations that they value. The core

data is analysed in the third section of the chapter, which focuses on participants' perceptions and evaluations of their experience when attending the four conferences used in the research. In this section, the results from the factor analysis are discussed first followed by an analysis of factors connected, firstly, to participants' perceptions of the macro factors impacting on the capacity of the kingdom to host international conferences, and, secondly, to their perceptions of its practical capacity in the field. The quantitative data mainly addresses the first objective, that of assessing Saudi Arabia's capacity to host international conferences, but also brings to light factors that are relevant to the second objective. Similarly, data gained qualitatively is at times used in the discussion of the quantitative data in this chapter if it serves to enhance or elaborate upon it in some way.

In chapter six, the data gained from interviews with officials and delegates will be analysed and discussed with a particular focus on responses made by participants in Saudi Arabia which might illuminate the wider social and political context in that country, and its possible impact on the development of the industry there. Interviews with the officials look at their knowledge and perceptions of the capacity of the two destinations to hold international conferences, and interviews with the delegates focus on their experience and perceptions both of the conferences and of the destinations. The themed analysis of the data is presented according to the objective each theme is relevant to. In both this chapter and the previous one, data gained from participants in the UAE is used to illuminate those areas in the KSA that might require modification or development as well as the factors that are already in place to support the industry. As explained above, the results of the data gained through the two methods are mixed in both this chapter and chapter five when relevant. Although much of the qualitative data is used to address the second objective, concerned with the social and political feasibility of the development of this industry in the KSA, data gained quantitatively which serves to elaborate on the themes that arose with regard to this aim, or which serves to enhance the data or reveal inconsistencies, is integrated into the discussion.

The key results from chapters five and six are brought together and discussed in chapter seven. Aspects of Saudi policy, religion, culture and the institutional framework for implementing change that have been considered in this chapter (chapter one) and that can be extrapolated from the data, contextualise the ensuing discussion of the findings and

form the basis for a final consideration of the potential the kingdom has to become an international conference destination. In light of this, a list of recommendations regarding the potential development of the industry will be given. The contribution to knowledge that this research study makes will then be discussed and an overview given of the limitations of the study. Finally, suggestions for further research will be proposed.

## CHAPTER TWO

## BACKGROUND TO THE MEETINGS INDUSTRY

**2.1. Introduction**

‘The human desire to meet and exchange ideas, the basis of conventions and meetings, is as old as humankind’ (Weber and Chon, 2002b). Organized gatherings to discuss cultural, political and commercial matters have been held since ancient times, as evidenced by the archaeological remains of ancient meeting sites in Athens and the Forum in Rome. The meetings industry in its current form operates on a global scale, generates billions of dollars through delegate expenditure, contributes to national and regional economies through investment, construction and generation of employment, and amounts to what Ford describes as an ‘economic powerhouse’ (Ford 2008:129). It is considered to have its origins in the trade and professional association conventions in the USA in the latter half of the 20th century, starting mainly with the formation of the Detroit Convention and Businessmen League in the USA in 1895 (Davidson and Rogers, 2006). It has developed, since then, into an established international industry which, in the USA, in 2003, accounted for over 12,000 conventions involving 12.5 million people, generating over US\$16 billion in spending and being valued economically at around US\$ 60 billion (Ford 2008).

Although these figures give some idea of the scope and value of the industry, because of the plethora of definitions of what constitutes a meeting, and variations in the methods used to collect data, reliable and consistent statistics in this field have been impossible to obtain. The aim of this chapter is to provide an overview of the meetings industry in order to contextualise the research study. It will begin with a brief description of the development of the industry to its current state, then turns to a description and explanation of the different components of the industry, before considering the reasons for, and effects of, the lack of reliable data to provide an accurate picture of its size, scope and value. This discussion will be followed by an account of the growth and globalisation of the industry, looking at the number of international conferences held and their location, before considering current trends regarding the size and cost of meetings and the influence of information technology. The final part of the chapter will look at the

meetings industry in the Middle East, concentrating on the Gulf countries, and on the development of the industry in the UAE and Saudi Arabia particularly.

## **2.2. An Overview of the Meetings Industry**

The rapid expansion of the international conference industry, particularly in the last decade, is due to a number of factors. Spiller notes that, beginning in the 19<sup>th</sup> and 20<sup>th</sup> centuries, the increase in the need for meetings between business leaders and entrepreneurs was coupled with advances in transportation, and an increase in disposable incomes, which led to a more mobile society and enabled travel to meetings (Spiller, 2002). Globalisation in the late 20<sup>th</sup> century fuelled a further increase in demand for international meetings driven by several factors: the increase in the number of international corporations leading to an increase in business being undertaken outside the home country and a corresponding rise in the need for international meetings; the development of the knowledge economy leading to an increased need for updates and transfer of knowledge, most effectively and efficiently carried out through meetings (Weber and Ladkin, 2003); the corresponding establishment of a growing number of associations with international memberships requiring international meetings; and the need for service and product launches requiring face-to-face meetings (Ladkin, 2006).

As a result of the increased demand for international meetings, destinations were motivated to invest heavily in infrastructure development, if this was not already largely in place as a result of a developed leisure tourism industry. As the meetings industry is least responsive of all tourism sectors to price changes and ‘peak-trough’ seasonal patterns, it is regarded as a very attractive sector of the industry (Oppermann, 1996b). Moreover, it has the potential to lead to increased use of the destination for leisure tourism, with delegates possibly being motivated to return to the country, or extend their business trips, and to recommend it to others (Rogers, 2003). Because business travellers are often perceived as constituting the high quality, high yield tourism sector, tourism authorities around the world are keen to attract convention visitors to their destination, thereby also adding a prestigious element to their image (Weber and Chon, 2002a).

‘The Meetings Industry has therefore emerged over recent decades as an important contributor to national economies ... [and] is perceived as a significant and growing

component of tourism' (UNWTO, 2006:vii). The industry is highly complex, comprising 'a multiplicity of buyer and supplier organizations and businesses' (Rogers, 2003). The buyers can be seen to be the organization (be it corporate, association, or government/public), and the delegates (the 'ultimate buyers or end-consumers of the conference product' (Davidson and Rogers, 2006:7). The suppliers, those who supply the products, facilities and services necessary for a meeting to operate effectively, include venues, accommodation providers, caterers, transportation suppliers, technical service suppliers and numerous others.

In this section, the aim is to provide the reader with an overview of the industry. It will begin with an exploration of the different names used to refer to the industry, and the issues connected to these, before turning to a general description of the different segments of the industry and a consideration of the issues caused by there being no standard definitions of these segments, and no standard methods for collecting data.

### **2.2.1 Description and Definition of the Meetings Industry**

Different names are used to describe the industry. One of these is 'Business Tourism', which, according to Davidson and Rogers is seen as confusing in the way it implies an equal focus on business and leisure, and also in the associations tourism carries with low status, poorly paid, seasonal work (Davidson and Rogers, 2006: 229). They point out, however, that, in Europe, this is the widely accepted generic term for the industry. However, the issues raised by the use of this name are conceptual rather than problematic in terms of data collection. One of the main reasons for the lack of industry information based on reliable and consistent data collection and usable statistics, is the lack of standardised terms and definitions throughout the world to refer to the sector as a whole and to its different components. For example, the problem created by the use of the acronym 'MICE' (referring to meetings, incentives, conferences and exhibitions) is that research and data are often presented as though they refer to *all* these activities, rather than, as is more often the case, to two of them – meetings and conferences (Weber and Chon, 2002a: 102). This means the true value of the industry can often be masked. The United Nation World Tourism Organisation (henceforth UNWTO) has used the terms 'Meetings Industry' and 'International Meetings Industry' interchangeably, which could

also lead to inconsistencies in the data on the size and value of the industry based on whether the statistics gathered refer solely to international meetings, or include data on regional and national meetings worldwide.

The title of the industry proposed by the UNWTO, the International Congress and Convention Association (henceforth ICCA), Reed Exhibitions and the Meetings Professional International (henceforth MPI) organisations is the 'Meetings Industry', the components of which include 'congresses, conferences, symposia, seminars, company general meetings and events such as public or trade shows, exhibitions, and incentive events that include a meeting booked through a convention or trade show organiser' (UNWTO, 2006: 19-20). However, in the report issued by the UNWTO in 2006, the three main components of the industry are summarised as: meetings and conferences; exhibitions; and incentives. The latter two segments have been under-researched in comparison with the former segment, meetings and conferences. In order to provide a more detailed description of the meetings industry, brief definitions and explanations of these different components will be given below. These are mainly based on definitions used by the bodies. In the USA, good figures of delegates spend and lengths of stay are collected by the International Association of Convention and Visitor Bureaux (henceforth IACVB).

An incentive, in the industry, is seen as a travel experience given as a reward or motivation to employees in recognition, or encouragement, of increased productivity or performance (Seekings, 1991, Ladkin and Spiller, 2000, Dwyer and Mistilis, 1997). A definition of the term 'incentive' given by the Society of Incentive and Travel Executives (henceforth SITE) in 2000, says that it '... refers to a global management tool that uses an exceptional travel experience to motivate and/or recognise participants for increased levels of performance in support of other organisational tools' (UNWTO, 2006: 64). With regard to exhibitions - or trade shows, trade fairs, or expositions, as they are variously referred to - these can be defined as a means of providing information on, and inducing sales of, a product or service, through a presentation to an invited or targeted audience (Davidson, 1994a: 194). Lumsdon, however, defines them in terms of their advantages, seeing these as making new influential contacts, image building, and assessing competitor products and services (Lumsdon, 1997). Although the benefits of these two may be perceived differently, there are accepted general definitions of what

these two sectors are; however, precise standardised definitions, which clearly delineate their functions, are not available.

As far as meetings and conferences are concerned, there is a wide range of definitions given for these. The definition of a meeting given by the ICCA encompasses most of the elements of all definitions of meetings:

‘A meeting is a general term indicating the coming together of a number of people in one place, to confer or carry out a particular activity. The key purposes of meetings are to motivate participants and to conduct business. Frequency can be on an ad hoc basis or according to a set pattern, as for instance annual general meetings, committee meetings, etc.’ (UNWTO, 2006:19)

However, definitions summarised in the UNWTO Report include one provided by the Convention Industry Council (henceforth CIC), which adds that among its primary activities are attending educational sessions, socializing or attending other organized events; this definition explicitly states that a meeting includes no exhibit component (UNWTO, 2006:63-65). The Business Events Council of Australia (BECA) adds a different element by stating that it is any ‘*off-site* gathering’ (my emphasis).

What sets the CIC’s definition of a meeting apart from their definition of a convention (‘An event where the primary activity of the attendees is to attend educational sessions, participate in meetings/discussions, socialise, or attend other organized events’ (UNWTO, 2006:64)) is that a convention includes a ‘secondary exhibit component’. The IACVB adds further detail in their definition of a convention, describing its aims as being to ‘provide information on a particular situation’ and ‘to establish consent on policies among the participants’, defining the participants as being ‘delegates, representatives, and members of ... a legislative body, social or economic group’ (UNWTO, 2006:64).

In contrast, a conference is described by the IACVB, in very general terms, as being ‘A meeting of two or more people to discuss a common concern’, and neither the CIC nor the ICCA define what kind of organization the attendees might belong to. Unlike the definition of a convention, in which one of the aims is stated as being to ‘establish consent on policies’, the aims of a conference are stated far more generally as being ‘to meet and exchange views, convey a message, open a debate or give publicity to some area of opinion on a specific issue’ (UNWTO, 2006:63).

The above form only some of the definitions of the different components of the industry but serve to provide an overview of the structure of the industry and its main players and elements. The different components therefore include meetings, conventions, conferences, exhibitions and incentives. It is clear, however, that there is a lack of a consensus with regard to the definitions of each component, or of the industry as a whole. There is also a tendency in research for certain terms (such as conventions and conferences, for instance) to be used ‘synonymously or indiscriminately’ (Davidson and Rogers, 2006). The lack of consensus regarding the terms, coupled with their indiscriminate use, creates difficulties in producing reliable and valid statistics. The implications of this will be discussed below.

### 2.2.2 Issues with Statistics

Despite the fact that many bodies and organisations, as well as academic institutions, have carried out a wealth of research into the industry, there are numerous problems with the findings when it comes to creating a reliable picture of the size and value of the industry. The World Tourism Organisation Report “Measuring the Economic Importance of the Meetings Industry”, issued in 2006, states the impossibility of measuring the industry accurately because of the ‘lack of consistent concepts and definitions, as well as data’ (UNWTO, 2006:vii). The report states that the data collected on the industry ‘shows enormous diversity and inconsistency’: the data are created for different purposes and using different methodologies, making comparisons difficult, if not impossible; the quality of data collection often fails to meet strict statistical standards, calling into question the reliability of the findings; and the statistics are based on different measures. In this section, the main focus will be on considering the problems caused by the lack of standard definitions being used in research and data collection, and the problems created by different approaches to, and standards of, data collection.

The definitions of the industry and its components given in the previous section (2.1) are conceptual. However, without agreement on standard conceptual definitions, the data collected cannot be comparable; if a research study on exhibitions, for example, only considers *conventions* to have an exhibit component, and another defines a *meeting* as including a secondary exhibit component, then the former might only consider previous

research done into conventions and therefore miss a sizeable source of information gathered on meetings with exhibit components.

Further problems with definitions are created by the lack of more finely tuned measurements of the different kinds of meetings. These measurements can include the duration of a meeting, the number of participants, and, in the case of international meetings, the number of countries participating. Weber and Chon point to the difficulties created by the lack of refined measurements saying that if, in one piece of research, a meeting is defined as involving a minimum of 6 people and, in another, as involving a minimum of 20 people, then those two pieces of research are not comparable (Weber and Chon, 2002a:102-103). Without a standard definition, a supply of valid and reliable statistics and findings to measure the value, size and state of the meetings industry cannot, therefore, be developed and worked from. However, Weber and Chon also point to issues created when tightly defined measurements (creating *fixed* definitions) are used (Weber and Chon, 2002a). They argue that, although precise measurements might sometimes be necessary, their inclusion in the definition can also lead to unreliable data that does not reflect the full picture. If a meeting is defined as consisting of a minimum of 15 people, for example, then meetings of 14 people would not be factored into the research, with a subsequent loss of data showing the true size and value of the industry. Similarly, if the definition of a meeting included it being of at least six hours' duration, then meetings of 5 hours' duration would not be included, and so on. With regard to international meetings, the criteria of the Union of International Associations (henceforth the UIA) are that it lasts for a minimum of 3 days, hosts a minimum of 300 participants and includes representatives from at least 5 different countries; again, this definition narrows the scope of industry activity and does not therefore provide a general overview of all meetings in the international sector. There is therefore an ongoing dilemma regarding definitions of the different components of the industry and the collection of data on them.

A further issue relating to the availability of reliable and usable data on the industry concerns the method for data collection. According to the UNWTO Report, the approaches of different types of agencies (such as, for example, government agencies or convention bureaus) demonstrate different standards of rigour and consistency, as well as differences in the frequency with which they collect data, calling into question their reliability and comparability (UNWTO, 2006). Global agencies that collect meetings

industry data regularly and consistently, and produce reports, include the ICCA, MPI, UIA and Reed Exhibitions. However, the UNWTO Report points out that the figures these agencies produce are not intended to provide an economic evaluation of the meetings sector they focus on, and very few contain definitions and descriptions of methods used. The writers of the Report urge that data be collected as part of the national statistics collection by a government agency, to give it credibility and authority and to ensure a vigorous and reliable approach (UNWTO, 2006).

## **2.3 Industry Developments**

This section will firstly consider the growth in the number of international meetings held between 1999 and 2008, and the most common locations in which they are held. The focus will then turn to a consideration of current trends with regard to delegate numbers, the duration and regularity of conferences, and certain financial aspects.

### **2.3.1 Growth – Numbers and Locations**

Because of the lack of a reliable database (reasons for which were discussed above), it is difficult to give a precise picture of the development of the industry and its current position. Figures showing the types of meetings held over a particular time period, the numbers of meetings per year, the number of delegates attending them, the length of meetings, the economic benefits and costs, and which international locations are most used, would give a thorough assessment of the current state of the industry, but have not been gathered at this time. However, in order to give a snapshot of one segment of the industry (looking at international meetings, which are the focus of this research study, rather than exhibitions and incentives), the following section will use the statistics produced by the ICCA presented in their 2008 and 2009 Reports (ICCA, 2008, ICCA, 2009). The figures they gather are on international association meetings organised on a regular basis, attracting a minimum of 50 participants and rotating between at least three countries; the associations range from medical associations (the largest segment) to scientific, academic, trade, professional and social group associations. The statistics are aimed to meet the marketing information needs of suppliers to the international meetings

business. General findings from the reports will be described first before a somewhat more detailed overview of the growth of the market, by continent and country is given.

Of all the international association meetings in 2008 that were included in the database, almost half had a worldwide rotation pattern whereas just over a third rotated their meetings within Europe, and 9.2% in Asia and Asia/Pacific regions. The majority (60%) of associations organising international meetings in 2008 had their headquarters in Europe, a quarter of them had theirs in North America, and 9.4% in Asia and the Middle East. Europe clearly has the dominant hold on the market (as will be discussed further, below). What is interesting about these figures, however, is the finding that such a majority of the meetings were planned on a global, rather than a continental, rotation basis, suggesting the potential for new and upcoming international locations to target those associations and be successful.

Table 2.1 shows the ranking of the top ten countries based on the number of meetings held there each year from 1999 to 2008, rather than the percentage share of the market held by different global regions (ICCA, 2009). Despite the U.S. figure dropping by 57 between 2007 and 2008, overall the country has maintained its lead across the ten years and continues to hold at least a hundred more meetings than the other countries. Between 1999 and 2008, the number of meetings held in Germany, Spain and France increased by 128, by 153 and by 110 respectively, although the most marked increase was with Brazil, who gained a place in the top ten in 2006 and whose overall increase in number of meetings over the ten years amounts to 174. A further interesting characteristic of the list of countries hosting the greatest number of meetings is that six of the ten are European countries, which explains why Europe is the continent which holds the most meetings, as discussed in the next paragraph. When looking at the rankings for cities having the most meetings only Singapore and Seoul are cities from outside Europe that are in the top ten, in 4<sup>th</sup> and 9<sup>th</sup> place respectively. However, Buenos Aires, Sao Paolo and Tokyo were ranked among the top 20 cities for the first time in 2008. Dubai, in the United Arab Emirates was ranked 50<sup>th</sup> of all cities, but showed an increase in the number of meetings from 19 in 2007 (its highest figure of the decade) to 28 in 2008. This reflects the emphasis placed on the development of Dubai as an international meetings destination, which is further reflected by the results for numbers of meetings held in different countries; the United Arab Emirates was ranked 47<sup>th</sup> out of a 100 countries and the

number of meetings held there increased from 5 in 1999 to 30 in 2008, showing a sharp increase in this last decade.

Table 2.1: Number of Meetings per Country

Rank	Country	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
1	U.S.	456	529	465	567	563	610	603	612	564	507
2	Germany	274	328	292	316	328	409	389	428	484	402
3	Spain	194	209	222	302	300	384	346	318	332	347
4	France	224	296	261	278	271	368	347	358	297	334
5	U.K.	270	320	229	303	317	317	363	357	316	322
6	Italy	213	235	267	288	316	317	299	296	291	296
7	Brazil	80	119	98	102	111	156	171	230	213	254
8	Japan	154	174	210	206	194	199	218	227	241	247
9	Canada	132	163	157	189	160	194	178	193	218	231
10	Netherlands	153	188	184	168	188	238	236	229	218	227

Source: ICCA 2009 Statistics Report

Table 2.2 shows the number of international association meetings convened in each continent, rather than in separate countries, and illustrates the growth in this segment of the industry over the ten years up to 2007 (taking into account that as well as indicating actual growth, higher numbers can also be the result of increased research investment and more associations being targeted for their meetings calendars). Over those ten years, the total number of meetings per year increased by more than a half, from 4,245 to 6,681 with the largest growth in terms of numbers of meetings being in Europe.

Table 2.2: Number of Meetings per Continent

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Europe	2,465	2,477	2,796	2,817	3,254	3,381	3,795	3,854	3,840	3,719	4,138
Asia & Middle East	647	695	721	791	892	867	1,167	1,220	1,209	1,257	1,387
North America	591	629	718	667	812	788	866	814	792	766	852
Latin America	269	283	349	355	346	412	451	543	554	552	684
Australia	149	164	225	199	189	197	223	216	233	232	225
Africa	124	104	122	122	135	136	151	163	140	155	189
Total	4,245	4,352	4,931	4,951	5,628	5,781	6,653	6,810	6,768	6,681	7,475

Source: ICCA 2008 & 2009 Statistics Reports

However, when percentage shares of the total market are considered, a different picture emerges. There is a decrease in the percentage share of the market held by both Europe and North America of approximately 2.5% each in this period (from 58% to 55.66% for Europe, and from 13.9% to 11.5% for North America), whereas the shares held by Asia and the Middle East, and South America rise by over 3.5% (from 15.24% to 18.81%) and by almost 2% (from 6.3% to 8.2%) respectively. Again, these figures demonstrate an increasing share in the international association meetings market by non-traditional destinations. Extensive globalisation of national economies in the last fifty years has probably contributed to this trend, as well as the speed and vigour with which economies such as the Indian and Chinese ones, particularly, have grown. The establishment of new businesses in emerging economies such as these has led not only to an increased demand for conferences but also to an increasing number of potential delegates wanting to participate in international meetings and events (Davidson and Rogers, 2006). A further effect of globalisation is that a number of emerging economies in Asia, the Middle East and Eastern Europe are moving into the events niche as part of their development, leading to increased competition with existing destinations and amongst venues and events organisers; that many of these new destinations offer competitive prices and high quality facilities is likely to result in even more of a shift towards them gaining a greater share of the market.

With regard to the financial value of this segment of the meetings industry, the ICCA Report from 2009 states that the total income from all meetings amounted to US \$12 billion in 2008.

### **2.3.2 Current Trends and Issues**

This section will again consider the statistics taken from the ICCA database on international association meetings, in order to give an overview of what the current trends are with regard to numbers of participants at meetings, the frequency and length of meetings, the amount spent on registration fees, and the total income generated by all meetings on the ICCA database. It will also consider more general trends in this sector, looking at how it is being affected by advances in Information Communication Technology (ICT), and the possible impact of certain social changes on the provision of events.

With regard to the size of meetings over the last decade, the average number of participants per conference per year between 1998 and 2008 decreased by 116, indicating a trend towards smaller meetings. Table 2.3 below shows the steady decrease in average participant numbers. Statistics showing the percentage of participants at different-sized meetings indicate that over the ten years, the majority, (29.3% in 1998, 28% in 2002, and 27% in 2008) attended meetings of between 250 to 499 delegates, with the second most highly attended size conference remaining at between 500 to 999 delegates. However, the percentage of delegates attending smaller conferences of between 50 and 149 and between 150 to 249, increased between 1998 and 2007 by 7.3% and 2.3% respectively and all larger conferences have seen a decline in the percentage of participants over those ten years.

Table 2.3: Average Number of Participants per Conference per Year

Year	Average Participant Numbers
1998	754
2002	701
2007	656
2008	638

Source: Adapted from ICCA 2008 and 2009 Statistics Reports

Between 2000 and 2007, the number of meetings held *annually* increased from 47% to 59%. A quarter of all meetings in 2008 were biennial (that is, convening every two years) but the percentage of 2-, 3-, 4- and 5- yearly meetings has steadily decreased over the decade, indicating a reasonably clear trend towards more frequent meetings, which was broken somewhat in 2008 by a decrease of 4% in the number of annual meetings. A further noticeable trend was in the average length of meetings, which decreased steadily between 1998 and 2008, from 4.44 days to 3.9 days respectively. Possibly the shorter lengths of meetings compensate for, or may be a result of, their increased frequency.

As far as the cost of joining a meeting is concerned, this is another area which has seen a generally steady upward trend over the decade 1998 to 2008, despite dips in average registration fees in the years 2000 and 2005 and in 2008, when it decreased from US\$565 in 2007 to US\$547. Average delegate expenditure echoes this overall increase, with average delegate expenditure per meeting increasing from US\$2,327 in 1998 to US\$2,568 in 2007 (although, again, with dips in 2000, 2003, and 2005). Table 2.4 below gives an overview of the figures in these two areas.

Table 2.4: Average Registration Fee &amp; Total Expenditure (US \$) per Delegate per Meeting

Year	Average registration fee per delegate per meeting	Average expenditure per delegate per meeting
1998	512	2,327
1999	516	2,345
2000	510	2,318
2001	516	2,345
2002	517	2,350
2003	573	2,605
2004	576	2,618
2005	517	2,350
2006	546	2,482
2007	565	2,568
2008	547	2,487

Source: ICCA 2008 and 2009 Statistics Reports

With regard to current trends in the associations meetings market, therefore, the data collected by ICCA indicates four main inclinations in the decade between 1998 and 2008: meetings became smaller in terms of participant numbers and they became shorter; however, meetings were held more frequently and, despite fluctuations in average registration fees and delegate expenditure, there was an overall increase across the decade in both these areas. Taking into account the figures in the previous section on growth, a further trend can be seen in the shift towards less traditional destinations being chosen for international meetings.

Another more general trend in the industry is the rapid switch to the use of ever-improving ICT. The extent to which the necessity for face-to-face meetings will be affected by the use of technology for video conferencing, for example, as well as the more common use of the internet for instant messaging of information is uncertain, although the trends towards shorter, smaller and more frequent conferences over the past decade can be explained at least in part through the faster spread of information facilitated by ICT. What advances might be made in this area is obviously unknown although it seems likely that ever more sophisticated, and satisfactory, ways of communicating across long distances will be created. Munro predicted the demise of the conference industry within fifty years (Munro, 1994), although Weber and Ladkin found in their research that the greatest drawback to using technology was seen to be the difficulty in building relationships (in comparison with the potential to do this in face-to-face meetings) (Weber and Ladkin, 2003) and Ladkin pointed out that although ICT could enable easier communication between people separated by long distances, it might also

have the effect of developing the need to actually, physically meet (Ladkin, 2006). Because of the changing age structure of populations in developed nations, where there is an increasing proportion of older employees, many conference delegates today are of the older generation (Davidson and Rogers, 2006). Unlike the younger generation, who have grown up with electronic media as a primary communication tool, who use the web as their primary source of information rather than paper sources or face-to-face communication, and who have grown used to having immediate feedback, the older generation of delegates may still prefer physical, face-to-face meetings (Davidson and Rogers, 2006). Possible future trends for meetings are that they might be more focused on social aspects, that the format of meetings will change from the current presentation type to a more interactive style using internet connections in the meeting spaces via laptops, and/or that the role of professional conference organizers will no longer be as organizers of large functions, but as facilitators of knowledge distribution and skill development (PCMA, 2000a). All of this remains to be seen.

#### **2.4 The Meetings Industry in the Middle East**

Research into the Meetings Industry in the Middle East region is limited, partly due to the fact that it is a relatively new market and partly due to a lack of official data gathering systems and organizations. The information in this section is based on research carried out by the Gulf Incentive, Business Travel and Meetings Exhibition organization (henceforth GIBTM) and published in two annual reports produced in 2008 and 2009. The section will begin by briefly describing the GIBTM and the Meetings Professional International organizations (MPI), as they are the two main bodies driving the development in this region and producing the data on which this section is based. The findings from the research will then be presented and discussed as a way of overviewing the current state of the industry in the Middle East, focusing initially on the Middle East in the global context, before turning to information focusing specifically on the industry in the Middle East. Finally, the findings from the report which pertain to the industry in the two Gulf countries being researched in this study - Saudi Arabia and the UAE - will be discussed.

### 2.4.1 GIBTM and MPI

The GIBTM is defined in their Exhibition Preview publication as ‘... the leading international exhibition dedicated to the Meetings, Incentives, Conferences, Events (MICE) and Business Travel Industry for the Gulf and Middle East region’ (GIBTM, 2009). This event forms part of a global portfolio of five events, three of which focus on the industry in other global regions (China, Australia and Europe) and one of which is run by the ICCA, an association whose membership represent the main specialists in handling, transporting and accommodating international events, with a network of over 900 suppliers, and one which offers networking and education opportunities to those involved in the industry. GIBTM has been organized in the Gulf since 2007 and its aim is to bring together regional and international buyers and suppliers for business, networking and professional education and to be the driver behind the development of the meetings industry across the Gulf region. The exhibition in 2008 had over two hundred exhibitors and in 2009, over two hundred and seventy five exhibitors, including venues, hotels, destinations, and suppliers looking to target the regional and international meetings, incentives and business travel industry. The exhibition also includes a professional education programme and, since 2008, has been run in partnership with the MPI. This ‘community’, MPI, has over twenty four thousand members worldwide and considers one of its main strategic imperatives to be the provision of ‘highly relevant, impactful knowledge and resources to our members’ (MPI, 2008). Its conference in the Gulf (the Gulf Meetings and Events Conference, GMEC), the first of which was held in Dubai in 2008) is based on its ‘recognition’ of the importance of the Gulf region for the meetings industry and aims to develop a ‘community’ for meeting and events professionals in the region by providing networking opportunities and educational seminars.

The Middle East Meetings Industry Research Reports, from which the following information on the meetings industry in the Middle East is derived, is based on research undertaken by GIBTM in association with ‘Meetme’ (a regional publication for meeting planners and travel professionals, formerly the MICE International magazine). The research for the two reports in 2008 and 2009 (GIBTM/meetme, 2008, 2009) was based on responses from buyers and suppliers to an online questionnaire they were invited to complete. The buyers and suppliers were on the qualified databases of Middle East and

international meeting planners and suppliers collated by Reed Travel Exhibitions (a leading international organizer of trade and consumer events) and Meetme. The data is analyzed independently. This is the only available source of data on the industry in the Gulf.

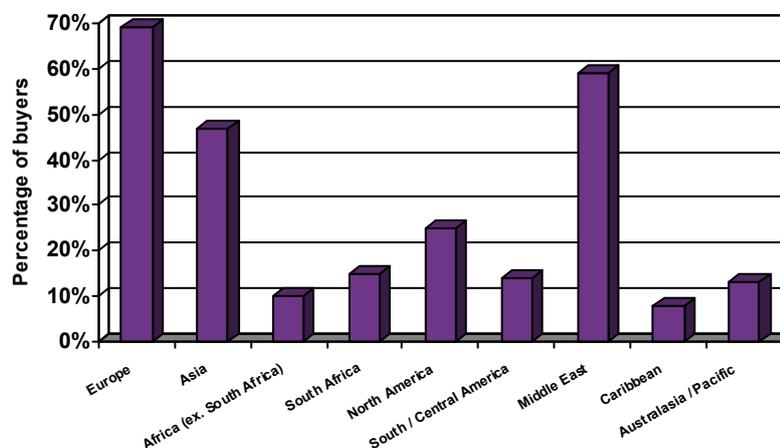
## 2.4.2 The GIBTM Research Reports – Discussion of the Findings

As indicated in the introduction (2.4), this section will consider the meetings industry in the Middle East, looking firstly at the Middle East industry in the global context, before focusing specifically on information relevant to the industry in the Middle East. It will end with a description of the industry in the UAE and in Saudi Arabia.

### 2.4.2.i The Middle East Meetings Industry: the Global Context

According to the research carried out by GIBTM in 2008, the destinations predicted by buyers to be the prime global ones for events by 2012 placed the Middle East in second position, with 59% of respondents choosing this region. Europe was considered by most (69%) to be a prime destination, and Asia was placed in third position (with 47% of buyers ranking this region as a prime future destination) (GIBTM/meetme, 2008). Figure 2.1 below shows the results for all global regions.

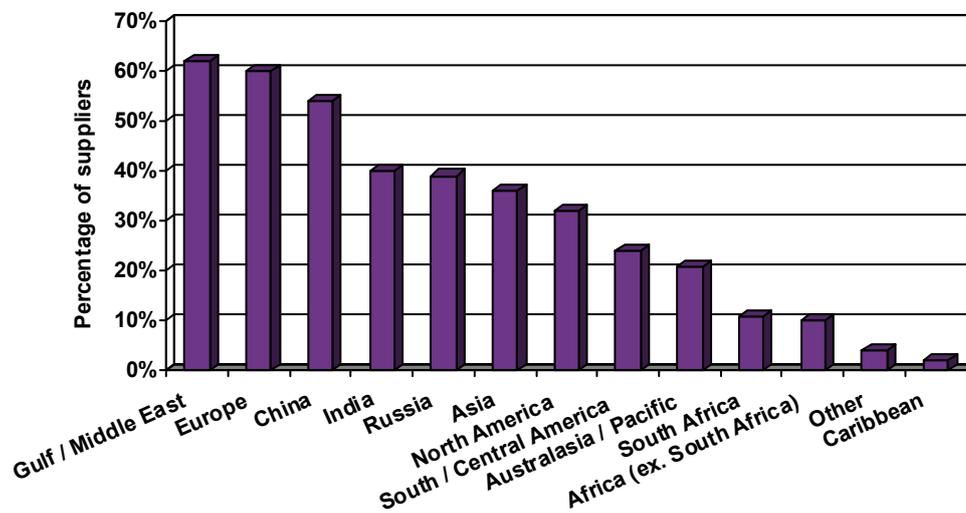
Figure 2.1: Prime Destinations for Events by 2012



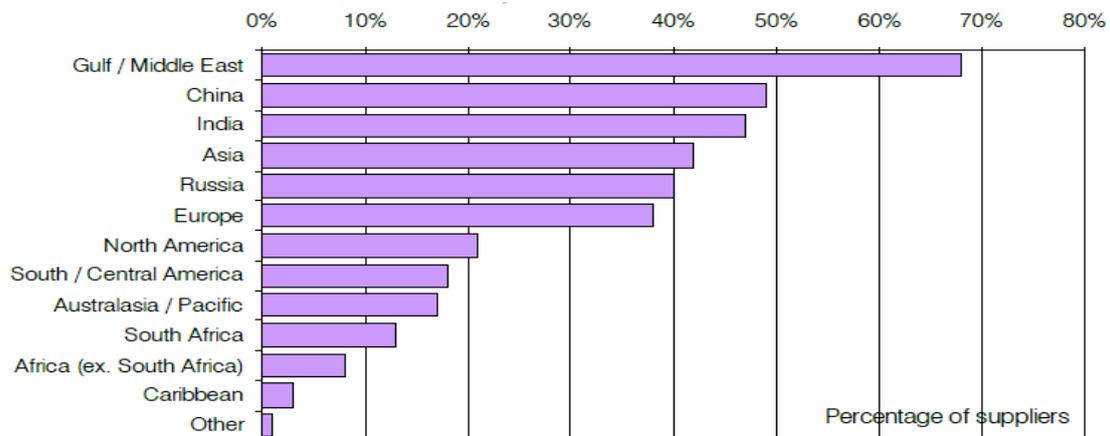
Source: GIBTM Middle East Meetings Industry Research Report, 2008

Figures 2.2 and 2.3 below indicate which world regions show the most growth potential, this time from the perspective of the suppliers. The Middle East was ranked first, with the majority, 62%, choosing them. Europe and China came close as second and third choices, with 60% and 54% of suppliers respectively considering them to have the most growth potential (GIBTM/meetme, 2008). The above figures indicates a great deal of confidence in the market in the Middle East and are borne out by similar findings in the 2009 research, which showed that an even higher percentage of suppliers (68%, an increase of 6%) considered the Middle East to be the global region with the most growth potential. Interestingly, in the global context, faith in Europe's growth potential dropped considerably (to 38%) and was replaced with the up and coming regions of China, India and Asia, all new competitive markets, chosen by 49%, 47% and 42% of suppliers respectively (GIBTM/meetme, 2009). Within the international market, therefore, the Middle East can be seen to have the potential to be a key player.

Figure 2.2: Suppliers, 2008: World Regions with Most Future Growth Potential



Source: GIBTM Middle East Meetings Industry Research Report, 2008

Figure 2.3: Suppliers, 2009: World Regions with most Future Growth Potential

Source: GIBTM Middle East Meetings Industry Research Report, 2009

#### 2.4.2.ii The Middle East Meetings Industry: the Regional Context

Countries in the Middle East include the Gulf countries (Saudi Arabia, the UAE, Oman, Qatar, Bahrain and Kuwait), and Yemen, Iraq, Jordan, Lebanon, Egypt, Iran, Libya and Morocco.

In order to give an overview of the meetings industry in the Middle East, this section will consider findings from the two reports (GIBTM/meetme 2008 & 2009) in the following areas: which countries in the Middle East are the most popular destinations for buyers and in which countries most suppliers have clients; who are the main buyers of meetings in the Middle East and what types of clients are most common for suppliers; the average size and duration of events in the region; and finally outlooks for both buyers and suppliers for the whole of 2009.

Events were held in over twenty two different destinations throughout the region in the period February 2008 to 2009. With regard to the most popular destinations, in the 2008 report, the five main destinations used for events in the twelve months leading up to the research included Dubai (59%), Egypt and Morocco (31% and 29% respectively), and Abu Dhabi and Jordan (21% and 18% respectively). When buyers were asked which destinations they were likely to choose over the following months, the top four included Dubai, Abu Dhabi, Egypt and Morocco, with Dubai standing out as being most popular, with 87%, and Abu Dhabi standing out because of the dramatic increase in intended use.

The 2009 Report shows that in the top three most used destinations in the region, Dubai retained first place, and Abu Dhabi, as suggested by the 2008 report, rose to third place, with 26% of buyers saying they had used Abu Dhabi to host an event. Egypt retained second place, although satisfaction ratings in the 2009 report ranked Egypt in fourth place after Dubai, Abu Dhabi and Oman. Dubai is also the most productive location for suppliers; over 70% of suppliers' clients are in Dubai, followed by Abu Dhabi (56%), Saudi Arabia (47%), Egypt, Qatar and Kuwait. Of the 96% of suppliers looking to increase their business in the region, the four most popular areas they aim to focus on include Dubai (74%), Abu Dhabi (73%), Qatar (69%) and Saudi Arabia (67%).

Of all the buyers, 81% had held meetings in the Middle East in the year before February 2009. The most popular events were meetings (57%) and Incentive Travel (56%), followed by 'Events' (39%) and a category called 'Conventions, Conferences and Congresses (34%)'. The Report does not define its terms however, so it is difficult to ascertain what is included under the 'Events' category and to understand the difference between a 'Meeting' and a "Conference, Convention and Congress" (or indeed to understand why these three have been placed in the same category), and therefore difficult to understand the significance of these figures. Of the total one hundred and sixty seven suppliers who participated in the study, almost a half did between 50% and 100% of their business in the Middle East, with 18% doing 100% of their business there. Most of the suppliers' business came from the corporate sector (70%), followed by agencies (60%), government or association not-for-profit organizations (38%), government-owned enterprises (37%), non-governmental organizations (30%) and other (6%). With regard to the corporations and government-owned enterprises, the main types of clients (that is, the buyers who provide most business for the suppliers) include those from the oil, gas and utilities sector, the pharmaceuticals and medical sector and the financial, banking and insurance sector, with over 60% of suppliers gaining business from each of these sectors. On the other hand, providing less than 17% of business to the suppliers were the science, mining, and agricultural sectors.

As far as the average size and duration of meetings in the region is concerned, the duration of 3.1 days was the same in both 2007 (for the 2008 Report) and 2008 (for the 2009 Report) although the typical size dropped from a hundred and ninety five delegates in the earlier report to a hundred and eighty eight in the later. The mean number of events

remained almost the same, but the value of the business was reported by 45% of suppliers in 2009 to have increased.

The outlooks of both suppliers and buyers show that the suppliers are a little more optimistic than the buyers with regard to the future volume of events, with 45% expecting it to increase in contrast with 40% of buyers. However, 47% of suppliers predict that budgets for individual events will decrease, as do 64% of buyers, with 60% of this group also predicting that budgets for marketing and promotions will decrease as opposed to only 35% of suppliers. This is in sharp contrast with 77% of the suppliers' belief that one of the main keys to an increase in business in the region is increasing awareness of the region. As far as the buyers are concerned, the most important issues to focus on for growth include the quality of facilities and services, marketing, and pricing, particularly in the light of the global economic downturn. Of the suppliers, 65% similarly said it would be advisable to focus on ensuring the region offered value for money, with 39% and 32% of them respectively pointing to improvements in the infrastructure being advisable as well as security assurance. Interestingly, almost 70% of the suppliers considered the Gulf/Middle East region to have the most growth potential of all global regions.

#### **2.4.2.iii The Middle East Meetings Industry: the UAE and the KSA**

The meetings industry in the UAE will be discussed first, with the state of the industry in Dubai and Abu Dhabi being considered separately. This will be followed by an overview of the state of the industry in the KSA.

Dubai is being increasingly recognized as a premier conference and meeting destination (Rogers, 2003) and has developed an effective infrastructure for this industry. Geographically, the Emirate is situated strategically at the crossroads between Europe (London is seven hours away), Asia (Hong Kong is eight hours away) and Africa (Nairobi is four hours away), with direct flights from its main airport, Dubai International Airport, to a hundred and thirty six destinations worldwide. The drive to develop this industry has resulted in the formation of the Dubai Convention Bureau (under the auspices of the Dubai Department of Tourism and Commerce), which has fifteen overseas offices responsible for marketing the destination and specific targets in place to increase

business. The Dubai Convention Bureau provides a full range of services, from venue research and bid assistance to on-site event services and post-event feedback.

The Emirate has also invested heavily in creating a range of purpose-built facilities for the industry, including the Dubai International Convention and Exhibition Centre (henceforth DICEC), situated a fifteen-minute drive from the airport and offering 60,000 square metres of exhibition and meeting space and with the capacity to seat 3,500 delegates. Other venues offered by the city include the range of four and five star hotels which offer extensive meeting facilities.

The GIBTM Reports of 2008 and 2009 show that Dubai was the destination most used for events in the Middle East region in the years 2007 and 2008. Of all events held in the ME in 2007, 59% were held in Dubai, putting this Emirate almost 30% above the second most popular destination, Egypt. Eighty seven per cent of all buyers participating in the survey said they aimed to use Dubai as a destination in the following year but the 2009 report shows a drop in the number of buyers to 44% (but with Dubai still maintaining the lead by about 15%), and a slight drop (to 72%) in intentions of buyers to use Dubai. Similar results are found for the suppliers, with Dubai holding top position (with 44%) with regard to where suppliers have most of their clients in the 2008 and 2009 Reports. With regard to intentions to attract more business, most suppliers again chose Dubai (with an increase in the 2009 Report to 74% from 71% in the 2008 Report). This indicates a thriving meetings industry which is still attracting a great deal of interest.

In contrast with Dubai, which has aimed to develop a deluxe exotic leisure tourism sector alongside the development of the meetings industry, Abu Dhabi's main focus is on elite tourism and meetings tourism. The Abu Dhabi Tourism Authority (henceforth ADTA) was set up in 2004. at the MICE Conference in 2007, Gillian Taylor, ADTA's Business Tourism MICE Manager, discussed what Abu Dhabi has to offer in this sector, pointing to advanced road and transportation networks and modern conference and exhibition facilities (ADTA, 2007). The Abu Dhabi National Exhibition Centre (henceforth ADNEC), whose indoor auditorium with its capacity for 5,700 makes it the largest in the UAE, was opened in 2007 and staged seventy three events in 2008, in contrast with the fourteen major events hosted at the old facilities in 2006 (Bundhun, 2009). As well as discussing the facilities, Taylor also drew attention to the systems in place in the Emirate

to encourage investment (these including financial and banking facilities, and 'laws and regulations to encourage local and foreign capital inflow and to ensure high returns on investment' (ADTA, 2007). In 2009, the ADTA launched an initiative offering organizers grants, cost rebates, and non-financial government support, such as with marketing, in order to encourage organizations to bring their events to Abu Dhabi (Bundhun, 2009).

The GIBTM 2009 Report shows that Abu Dhabi came third in ratings for the most used destination by buyer respondents in the twelve months prior to the survey (after Dubai and Egypt, in first and second place respectively, and before Morocco in fourth place); there was a rise from 20% of meetings being organised there in 2007/2008 to 26% in 2008/2009. Satisfaction ratings placed Abu Dhabi third after Dubai and Oman. As far as buyers' intentions to hold meetings in Abu Dhabi are concerned, the Emirate was second in the top ten destinations, indicating an increase in the intentions of buyers to use it as a destination for their events.

As far as supplier respondents in the 2009 GIBTM Report are concerned, 56% of the 167 had clients in Abu Dhabi, making this Emirate the second most frequent location, after Dubai, for clients in the Gulf/Middle East region. Almost all the suppliers - 96% - indicated that they were looking to increase business in the region, and, of these, almost three quarters - 72% - indicated that they were focusing on Abu Dhabi.

Further evidence of the success of the country can be seen in the Awards granted to the ADNEC in 2009. The Middle East Events Awards voted ADNEC as 'Best Venue' and recognised its CEO, Simon Horgan, as making an 'Outstanding Contribution to Industry'. The World Travel Awards also voted ADNEC as the 'Leading Exhibition Centre' in the Middle East and the International CONFEX Awards recognised it as the 'Best International Venue'.

In contrast with both Dubai and Abu Dhabi, Saudi Arabia has tended to focus more on the national and regional markets. Business travel accounts for 17% of income from tourism in Saudi Arabia, thereby forming a relatively small part of the market. A Report entitled 'The Strategy and Action Plan for the Development of the MICE Market in Saudi Arabia' stated that 92,500 events, catering in total for 4.7 million delegates, are run annually in Saudi Arabia. However, the majority of the delegates are Saudi nationals, indicating that the main focus of the market is domestic rather than international. There are plans to

move into the global meetings industry but these will take time to implement. There is a reasonable support structure for meetings and exhibitions within the kingdom, in terms of hotels, airports and professional organizers, with fifty five principal venues (forty of which are hotels), based mainly in Riyadh and Jeddah.

The three international exhibition and convention venues available in Saudi Arabia, the main centres for large meetings groups, are in Jeddah, Riyadh and Dammam. The Jeddah Centre for Forums and Events, opened in 1990, was the first one to be built in the Kingdom. The Dhahran International Exhibition Centre in Dammam is only an hour away from Kuwait, Qatar and Bahrain, making it more suited for intraregional than for international meetings. Finally, the Riyadh International Exhibition Centre is a world-class exhibition complex with 15,000 square metres of exhibition space and a capacity for 10,000 people. A limited number of organizing companies are affiliated with, or work alongside, these centres (Meetmiddleeast, 2009).

The 2008 GIBTM Report (GIBTM/meetme, 2008) showed that, of all destinations in the Middle East used by buyers for events in the year preceding the report, Saudi Arabia was used for only about 9% of them but this figure was predicted to increase to 16% in the following twelve months. The 2009 report shows that their share of meetings in the region only rose to 12%, and was predicted to remain at that level for the following year, suggesting a decrease in confidence in the Kingdom attracting and hosting more meetings. However, as far as satisfaction ratings with meetings were concerned, the 2009 report shows that Saudi Arabia was in the top ten of the twenty three destinations in the Gulf /Middle East and North African countries surveyed (coming ninth). With regard to suppliers' links to Saudi Arabia, the 2008 Report shows that 33% of all their clients are based in Saudi Arabia (placing it in third position) and 55% of suppliers said they were looking for new business there. The 2009 Report indicates a rise to 47% of all clients being based in Saudi Arabia, indicating that suppliers looking for business there may have been successful. What is most remarkable about the findings on Saudi Arabia in this 2009 Report was the 12% increase in the percentage of suppliers looking to attract business in the Kingdom (from 55% to 67%), this again indicating heightened competition for Saudi Arabia as a source market.

## 2.5 Conclusion

This chapter has aimed to give an overview of the meetings industry. Difficulties in conceptualising and defining the industry have been discussed, along with the implications of doing this with regard to statistical research. If reliable and valid figures on the industry are to be gathered, it seems that more emphasis needs to be placed on ensuring that consistent definitions and standardised methods of data collection and analysis are used. However, statistics were taken from ICCA and the GIBTM reports in order to give some indication of current trends in the industry globally, and in order to more clearly delineate the state of the industry in the Middle East, paying particular attention to the two countries focused on in this study - Saudi Arabia and the UAE. Clearly, the meetings industry seems to be robust in the international context and is one which a greater number of countries are wishing to develop. The figures taken from ICCA and the GIBTM reports indicate that the UAE is gaining a substantial amount of the developing market for events in the Middle East region and there appears to be, judging from the GIBTM Reports, a great deal of confidence in both Dubai and Abu Dhabi, with the former continuing to hold the strongest position of all destinations in the Middle East, but with the latter becoming progressively more popular and targeted. Although Saudi Arabia was not so popular as the Emirates with buyers, with only 11% of buyers having chosen the kingdom, in contrast with 44% choosing Dubai and 26% choosing Abu Dhabi, the reports indicate increasing interest in the kingdom on the part of suppliers looking for clients. This indicates a possible lack of confidence in the kingdom as a destination (which could be due to the kingdom not actively looking to gain buyers' business) but shows increased openness to outside suppliers.

The objectives of this research study are to consider whether Saudi Arabia has the potential to develop this sector, looking at both its capacity to host international conferences and what factors impacting on its development might be affected by its social and political situation. The information presented in this chapter provides a context for the study and positions Saudi Arabia and the UAE within the international market.

## CHAPTER THREE

### LITERATURE REVIEW

#### 3.1 Introduction

The focus of this chapter is on reviewing the literature pertinent to the international conference industry. Most research into the meetings industry has been carried out in the English-speaking world, looking at western destinations and western visitors. This research aimed to fill this gap, looking at the conference industry in Saudi Arabia and the UAE. As Saudi Arabia has not yet committed to developing the meetings industry, there is no academic research into conference tourism in that country. Neither are there detailed academic studies into the industry in the Middle East region. This has meant that the author had no direct precedents on which to base her research design. In her efforts to gain an understanding of the factors relevant to the development of the industry, generally, and which of these might impact on whether or not Saudi Arabia has the potential to be an international conference destination, the author therefore needed to rely on literature and academic research carried out in other regions of the world (mainly the United States, the United Kingdom and Australia, three of the most mature conference tourism destinations) where the bulk of research has been carried out (Ladkin et al., 2002). It was necessary to bear in mind that factors relevant to these areas may not be completely relevant to the Gulf region and, more importantly, that there might be additional factors more germane to Saudi Arabia and the UAE.

Because of the dearth of previous research in the Middle East, and because this study was being carried out into a country that was still in the process of considering commitment to the development of this industry (that is, there was no established industry already in place to explore), it was difficult to isolate which areas most urgently needed investigating. It was necessary to develop an understanding of the potential within the country to develop this industry, and the feasibility of it being able to do so, which could only be gained from looking at a range of factors which seemed relevant to this, rather

than focusing on one specific area, which might be more appropriate with an already established conference destination such as quality of venues or marketing and brand imaging of a destination, for instance much of the research in other countries has been carried out into the site-selection process and criteria of meetings planners rather than into the decision-making process of delegates (Yoo and Weber, 2005, Lee and Back, 2005), or on ‘convention attendees’ perceptions of convention destinations’ (Lee et al., 2010). Although this research study focuses mainly on how *delegates* perceived conferences they attended in Saudi Arabia and the UAE, because of the general scarcity of research into delegates and the conference attendance decision-making process, the study is based on indicators and factors gleaned both from what literature was available in that area and on the literature on the site-selection process. Because of the almost complete lack of available literature or documentation on the approach to developing the industry in Saudi Arabia, the author needed to base her questions partly on general literature on the industry and partly on her own knowledge of the country.

In comparison with many other industries and areas of academic research, research into the conference industry, particularly the international conference industry, is still limited. Van Doren, Koh, and McCahill (1994) suggest that analyses of the level and direction of evolving research literature provide an essential measure of the maturity of any growing field of research. Analyses of the evolving literature in the field of the conference industry are limited in number, reflecting how young this field is, and leading to a scarcity of indicators of the trends governing conference industry research. This is in contrast with many other sub-sectors in the field of tourism, with their wealth of research literature and reviews (Severt et al., 2009, Song and Li, 2008, Song and Witt, 2000, Baloglu and McCleary, 1999, Crawford-Wetch and McCleary, 1992, Chon et al., 1989). Coupled with the scarcity of analyses of the industry is the fact that, because the industry itself is fragmented, so too is the research done into it. Ladkin (2002:105), explaining the complexity of the industry, points out that it encompasses a variety of components, including sectors (meetings, incentives, conventions, exhibitions), buyers (corporate and association), suppliers (destinations and venues, accommodation and service providers), agencies and intermediaries, and industry organisations (trade associations, national tourism organisations, convention bureau industry consultants, educational institutions and trade media). She also points to how fragmented it is in terms of geography (with

certain areas of the world providing more advanced statistics and information), size (with enormous variations in the sizes of meetings that are researched, and with definitions of meetings that encompass those attended by eight people alongside those attended by many hundreds), the type of sector focused on (with meetings and conventions being more well-researched than exhibitions and incentive travel), and in the definitions of what constitutes the different sectors and what terms are used to refer to the different activities. An exploration of relevant aspects of this fragmentation was carried out in the previous chapter, which provides a background explanation of the industry. What is relevant here is the negative effect this fragmentation (and the complexity of the industry) has on the research literature – there is a shortage of research that provides information on one sector of the industry, one size of meeting, one area of the world, one perspective, one factor. Research carried out into delegates' evaluations of, for example, provision of entertainment during international conferences in one specific global region, over a certain period of time, might begin to indicate trends and provide trustworthy statistics, measurements and information regarding that area of research; so far, this has not been carried out.

Yoo and Weber (2005) say that studies prior to their own were limited in their focus, with Carlsen's reviews being region-specific (looking at research into conventions and exhibitions conducted in Asia and Australia) and Crouch and Ritchie's overview being topic-specific (looking solely at the area of convention site-selection) (Carlsen's 1995, 1999; Crouch and Ritchie's 1998). Both Yoo & Weber and Lee & Back in their reviews of the literature, emphasize the need for more extensive empirical research, with both of them finding that the bulk of research had been carried out into the site-selection process. (Yoo & Weber; Lee & Back, 2005). Yoo and Weber (2005) claimed that different aspects of the industry need to be examined simultaneously. Lee and Back (2005) called for an examination of the relative role of site selection factors, and for systematic and theoretical research into the complex field of attendees' meetings participation behaviours, looking at the relative influence of potential attendees on site selection. Severt et al, in their very brief overview of the literature, found that most research had been carried out into site selection factors for buyers, attendee motivation factors, meeting planner issues including decision-making processes, destination perception and image assessment, and general

industry literature (Severt et al., 2007). This indicates a shift, to some extent at least, in research trends in the field to a more focused look at attendees and destination image.

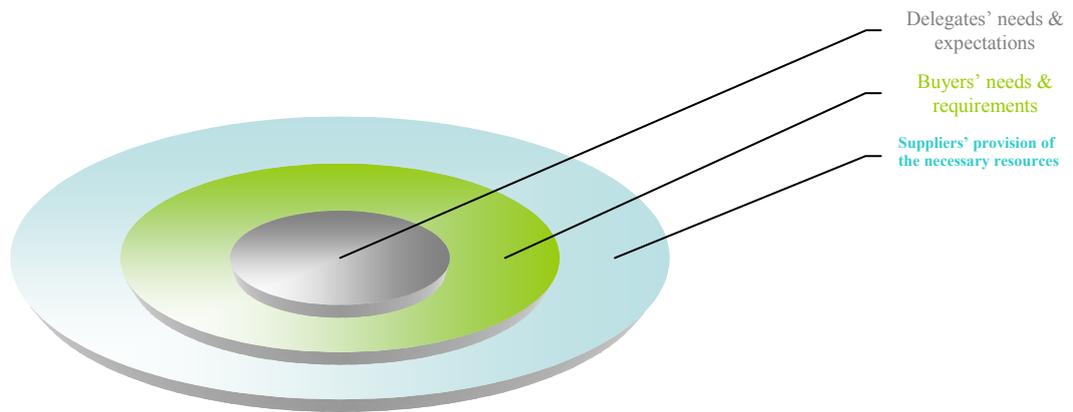
The researcher used the above three reviews, general reading, and her own knowledge of the country, as a springboard for deciding on the design and content of her research study (see 4.3). Through a process of elimination of previous research areas that had been focused on, and an assessment of gaps in the available literature, she was able to distinguish which factors would be relevant to her research. Of the five themes identified by Lee and Back (2005), for example, three of these (the economic significance of the industry, destination marketing, and advances in technology) were not considered to be overly relevant to the current situation in Saudi Arabia. Furthermore, it was not possible (due to restrictions on access to relevant documentation and figures and to limitations of time and space) to research five of the categories in Yoo and Weber's (2005) review, these including 'operations', 'finance', 'economy; 'research and development' and 'human resources'. The focus of this research study meant that categories concerned with factors that attract people to a destination, and therefore that serve to illuminate the potential of a destination to be successful, were considered particularly pertinent (as would the absence of such factors be in indicating possible barriers to its development). These categories involved factors taken into account in the convention site-selection process and in the meeting participation process.

This literature review is divided into two main parts. The first summarises the main research carried out into the areas of site selection and attendee decision-making processes. This enabled the researcher to gain an overview of the different factors that are significant in these areas and of the gaps in this research. The author then drew on this exploration in an attempt to identify which factors might be relevant to her research. Research into these separate factors is considered in greater detail in the second part of the chapter, as a way to more deeply understand their relevance to her research and in an attempt to ascertain the areas in which more research is needed, and the type of research necessary. The themes focused on in this section include: 'destination stimuli', a category named by Yoo and Chon (2008), but enlarged in scope in this study to include the areas of location, image, travel opportunities, opportunities at the destination, the site

environment, and factors regarding the actual venue; ‘travelability’, again taken from Yoo and Chon’s (2008) categorisation but expanded upon to include factors connected to accessibility and cost; and ‘safety and security. The review will end with a discussion of the key findings, summarising the main areas covered in the body of research and considering the strengths and weaknesses of the research as they relate to this study, focusing not only on gaps that this study will address but also considering limitations in the research and its relevance to the Gulf context.

### **3.2 Overview of ‘Event Site Selection’ and the ‘Decision-Making Process’**

Ladkin defines the buyers in the Meetings, Incentives, Conferences and Exhibitions (MICE) industry (see 2.2.1) as ‘the purchasers of MICE products’ (Ladkin, 2006: 58), those who wish to hire a conference or exhibition venue, as well as a range of services, in order to hold an event. She defines the suppliers in the industry as the elements that meet this demand by providing destinations, venues and services. Ladkin also discusses intermediaries and agencies, saying that along with the suppliers and buyers, these are the main players in the industry. She does not discuss the attendee as a main player. Clearly there are differences between the active and involved role played by the buyers and suppliers and the more removed role played by attendees. However, in terms of the success of the industry, the attendees can be viewed as the end-product consumer, and therefore as players with a great deal of influence on the success or otherwise of any event held (see Figure 3.1). If one of the main aims of meeting planners and buyers is to maximise actual and repeat attendance, then the needs, demands, expectations, and, finally, the evaluations of the delegates should feed into their decision-making process when they select a site and venue. The needs, demands, and expectations of the buyers should, in turn, feed into how suppliers develop their products and how they position themselves.

Figure 3.1: The Relationship between Demand and Supply

Source: Author 2009

The suppliers are therefore in a position of needing to satisfy the buyers and, more indirectly, the delegates, if they are to be successful. Little or no research has been found into the extent to which, or how, suppliers research the buyers' and the attendees' needs. Neither has any research been found into the extent to which, and how, buyers (or planners, associations, or corporations) research the needs and expectations of their members/the attendees. To a great extent, however, buyers must take into account the needs and expectations of the delegates (or, at least, what they perceive these needs and expectations to be). For this reason, research into the process that buyers go through when selecting a site, and most particularly, into those factors that the research indicates they prioritise, will throw light on what is required of a destination. This will be supported, or not, by the factors given priority in the conference attendance decision-making process of attendees. Together, it is hoped that a consideration of these two processes will clarify the factors necessary to investigate in the researcher's exploration of the extent to which Saudi Arabia has the potential to host international conferences which meet the requirements.

### 3.2.1 Site Selection for Events

Research carried out into site selection has focused mainly on the criteria used by buyers or planners when selecting a site. Crouch and Ritchie's conceptual model based on a literature review of 64 studies of site selection factors, identifies eight 'Primary Factors in Site Selection', all of which can be seen to be focused on, to greater or lesser degrees, in research into which factors are considered during the decision-making process of planners and/or buyers when selecting a site for an event (Crouch and Ritchie, 1998). One major factor they identify is accessibility, with the associated dimensions being the cost of going to the event, the amount of time required to attend, the frequency of the meetings, how convenient it is to travel there and, finally, the barriers to attending. Ladkin claims that accessibility is a factor given high importance by many meetings planners (Ladkin, 2006), and Oppermann cites research carried out by Fortin, Ritchie & Arsenault (1976) and Edelstein and Benini (1994) as indicating that this is a major site selection factor (Oppermann, 1996a). Research undertaken by Oppermann (1996a) Crouch and Ritchie (1998), Crouch and Louvière (2004) and Chen (2006) does not indicate an emphasis on accessibility in the site selection process, however.

'Accommodation facilities' is a further principal factor (Crouch and Ritchie, 1998). This includes the dimensions of the availability of accommodation at a venue (Oppermann, 1996a: ASAE 1992), the capacity to accommodate the number of expected attendees, the cost of the accommodation, the quality of the service offered and the level of security (Crouch and Ritchie, 1998 and, Oppermann, 1996a). Crouch and Ritchie (1998) also identify a 'meeting facilities' factor; as with the accommodation category, associated dimensions here include cost (see also Crouch and Louvière, 2004), whether the venue is available, the capacity of the venue to host the meeting, and the level of safety, (see also Oppermann, 1996a). Other associated dimensions not included under the accommodation factor are the layout of the venue, its ambience, and prior experience of the venue. Chen found that the 'meeting facilities' factor (coupled with the accommodation facilities and the site environment factors) was given highest ranking in her particular study, although the study was undertaken in the domestic (Australian) market and there may have been different findings if the study had been an international one (Chen, 2006). Crouch and Louvière's study specified the 'quality of the exhibition space' and the 'suitability of the plenary room' as principal factors within this category (although these factors are not

relevant to all conferences or events) (Crouch and Louviere, 2004). Venue factors will be considered in more detail in 3.3.2 below.

‘Site environment’ factors, a fourth category, involves the climate at the site, the setting of the site and the infrastructure it has developed. Crouch and Louvière also identified the physical setting as an important dimension, as well as isolating the socio-cultural setting as an influential factor (Crouch and Louviere, 2004). The dimensions of entertainment, shopping, sightseeing, recreation and professional opportunities are part of a fifth category named ‘extra conference opportunities’. This is becoming an increasingly important factor in the choice of site and will be discussed in detail below (see Section 3.3.1.iii). Oppermann (1996a) found that planners placed ‘nightlife’ ‘climate’ and ‘opportunities for sightseeing’ low on their list of priorities and cites Edelstein and Benini as finding similarly (Edelstein and Benini, 1994, cf. Opperman, 1996a). Crouch and Louvière, on the other hand, found that opportunities for entertainment, shopping, sightseeing and recreation were an influential factor in the selection process (Crouch and Louviere, 2004).

Three further categories are identified as ‘local support’ (involving the existence of a local chapter, as well as of convention and visitors bureaus and/or a convention centre, and subsidies), ‘information’ (involving reputation and marketing) and a factor categorised as ‘other criteria’ (involving the elements of potential risk, profitability, association promotion, and the pull factor of novelty).

The above gives a brief overview of the main factors considered in the process of selecting a site. Many of these factors are considered in more detail in the section entitled ‘Venue factors’ below (3.3.2). Although a range of research projects that indicate the same criteria have been drawn on, it is important to note that the Crouch and Louviere study is based on the Australian domestic conventions industry (Crouch and Louviere, 2004); although it seems likely that similar criteria would be used to select an international destination (buyers would need to be aware of accommodation and venue factors, for instance), it is also possible that a range of other factors might be important, and the priority given to all factors might differ. What is apparent in the area of research into site selection is the lack of a focus on the relative importance of these factors, and the range of variables that could impact on the priority given to them. Weber and Chon argue that the scope of the association, whether it is regional, national or international, could

'predetermine the range of convention locations available to organizers' (Weber and Chon, 2002a). The findings of the research carried out by Comas and Moscardo (2006) demonstrated that the importance placed on similar attributes differed between different types of association and they pointed to Choi and Boger's (2002) study, which also found that site selection factors for US State Associations varied according to the age, size and budget of the association. Comas and Moscardo do state, however, that this is one of the few published studies in this area. Chen also points out that different regions and different types of convention will place importance on different factors, and that more research is needed into these different types of conventions and locations and environments of hosts (Chen, 2006). Another element pointed to by Comas and Moscardo (2006:120) is that there is no research considering "trade-off" factors used by meeting planners.

Research carried out into the international destination selection criteria of meeting planners by Jun and McCleary also found that the type of meeting planned was significant in its impact on these criteria (Jun and McCleary, 1999). One of their findings was that the more serious and important the meeting was the less important were the factors of cost and associated social elements. They argue that planners need to weigh their needs regarding the characteristics of specific hotels and convention centres against their needs regarding the site, but add that a city, or a country, needs to be in the association's set of potential destinations before hotels are considered. Their main findings, however, were that it was possible to categorise meeting planners according to the degree of importance they placed on the various characteristics of a potential meeting location, indicating that 'there are distinct market segments with varying needs and wants'. Their cluster analysis, based on a previous factor analysis of fifteen destination selection scales, revealed three homogenous groups of meeting planners, distinct from each other in their education background, the type of association they worked for and the type of meeting they planned, and all of which showed distinct orientations towards particular factors they placed importance on. The first included meeting planners who were mainly oriented towards distance and environment factors, with associated variables being distance from individual attendees, political environment, and the popular image of the location. The orientation of the second group was towards social elements, the variables here including the availability of recreation facilities, the availability of nightlife activities, and the climate. The third group tended to place most importance on factors related to the logistics and cost of the meeting, with the variables being availability of services and

suppliers, ease of transporting attendees to and from location, the crime rate, and the availability of hotel and meeting facilities, alongside consideration of overall value and level of costs, stability of currency and exchange rate, transportation costs, customs procedures, and the sightseeing, cultural and historical attraction of the location.

Research carried out by DiPietro et al aimed to explore whether there were any differences in the priority given to certain selection criteria by organisations planning different kinds of events (DiPietro et al, 2008). Their study was based on the responses of members of three international associations for different types of events professionals (Meeting Professionals International (MPI); The International Association of Exhibitions and Events (IAEE); and the Professional Convention Management Association (PCMA)). The findings indicated important differences in the most important site selection factors for each association, findings which appear to be consistent with the different objectives and considerations of each association. For instance, the factor rated most important by the IAEE was dedicated exhibition space, which seems unsurprising in light of the fact that 47% of respondents from that association indicated that exhibition was the largest event they had planned. The PCMA gave top priority to ‘support services for events’ which DiPietro, Breiter and Rompf & Godlewska (2008) attribute to the PCMA’s need for these because of the complexity of the annual conventions they organise. They also attribute the importance given by the PCMA to the factors of ‘safety and security’ and ‘transportation’ to the complexity of using multiple hotels and of having to transport delegates to and from different locations to the site. Overall, the study indicated a range of factors to be taken into account when considering what criteria are most important to different associations or organisations, criteria which would become important to Saudi Arabia only after it had committed to developing the industry, and when deciding which market segment(s) to target.

The emphasis in most of the above research has focused on the factors governing site selection, albeit from the perspective of the relative importance of these factors in a range of situations and contexts. Fawzy and Samra take this area of research one step further by considering the actual *process* of site selection and the various factors that can impact on the selection of the site at the different stages during this process (Fawzy and Samra, 2008). Fawzy and Samra’s aim was to create a model of the site selection process (based on looking at the criteria important to buyers prior to selecting a site) from the perspective

of organizational buyer behaviour (OBB). Their study of the environmental, organizational, individual and interpersonal variables influencing OBB throws clearer light on the factors that can impact on site selection (Fawzy and Samra, 2008:125). With regard to environmental variables (those that are external to the organization, such as cultural, political, technological, legal, economic, and physical (geographic, weather, ecological), Fawzy and Samra argue that buyers are heavily influenced by, for instance, the current and projected economic climate. Interestingly, there is a great deal of interest in doing business in Saudi Arabia as it is seen as a lucrative market (Rice, 2004:76); the focus of this study, however, is on what factors would attract people to conferences in Saudi Arabia, rather than the internal variables of an organization that would affect its buying behaviour. The area of OBB might therefore be more relevant to the KSA's situation once it has started to develop the industry and is considering how to market itself and attract buyers. Organizational variables such as the objectives of the organization, the procedures it has in place, its policies, structure and systems, can also have an impact on site selection; an organization may, for example, have a policy of geographic rotation of conventions. A further significant variable in OBB, is the individual (her or his perceived role, education, personality, motivation, buying preferences, past experience, and so on, impacting on the work the individual does); it is the individual who defines and analyses the buying situation and the individual who decides and acts (Webster and Wind, 1972). This variable is therefore considered to be highly influential and can impact on the site selection process if the buyer has different buying preferences, for example, or particular likes and dislikes with regard to a prospective meeting site. Finally, Fawzy and Samra point to the influence of the interpersonal variable, isolating within this variable such factors as interests, the level of authority held, and the status accorded in an organization, as well as the empathy and persuasiveness of a significant individual in an organization. One example given of this variable concerns when a planner may give possibly undue attention to the requirements and opinions of a chairperson out of fear of reprisals for not doing so, or out of a wish for reward.

One other major factor considered by Fawzy and Samra is recognising the 'type of buy class' the buying of a site falls into (Fawzy and Samra, 2008). If the buy is a new one, that is, the venue, for example, has not been used before, all the steps they delineate in their model will apply and will need to be strictly adhered to in order to avoid risks.

Should the venue being sought be one that has already been used by the organisation, however, many of the steps will be processed more rapidly, if not omitted, and the process is therefore less time consuming and costly. The time, commitment and cost involved in a new buy will therefore act as further factors influencing the selection of a site.

Highlighting a further factor, Jago and Deery found that a destination is often selected by an association because they perceive it as being ‘interesting, exotic, safe, accessible’ and, interestingly, because it is seen to be accepting of ‘all types of delegates’, (Jago and Deery, 2005:33) which is seen as an important consideration when selecting a site for a culturally diverse mix of attendees. Considering the fact that the international conference market is developing so rapidly, and in light of the globalised nature of business today, it seems surprising that more research has not been undertaken into the capacity of destinations to cater for delegates from a range of cultures; how, for instance, are dietary, language and worship needs accommodated? The area of ‘image’ will be explored in greater detail in 3.3.1.i below and the research study had a clear focus on this area.

To conclude this section, the majority of research has been conducted into the factors influencing the selection of a site for an event, and, increasingly, the research is becoming more refined and defined - the numerous and subtle variables that can impact on which site is selected are being explored in greater depth. Research has looked at the weighting of factors that buyers engage in, at the size, scope and wealth of an association in relation to the sites it selects, and at the type of association hosting the event and how this can have an impact on which factors are given priority. The seriousness of the meeting has been seen to have an effect on what factors take priority when selecting a site, as has the orientation of the actual planners, with Jun and McCleary grouping planners into three different groups based on their orientation (Jun and McCleary, 1999). Other factors, such as the destination creating an accepting space for a culturally diverse mix of delegates, have not reckoned into other research, suggesting that there may still be factors which have not yet been distinguished or explored. Fawzy and Samra’s investigation of Organisational Buyer Behaviour in site selection aimed to look at the process of selecting a site and found that environmental, organizational, individual and interpersonal variables all had the potential to impact seriously on the process (Fawzy and Samra, 2008).

### 3.2.2 The Attendee Decision-Making Process

Severt, et al point out that much of the literature in the field of conference tourism has focused on the perspectives of events planners with regard to site selection, top convention destination locations, and image of destination city, leaving research into the factors motivating attendees to attend a meeting, or deterring them from doing so, underdeveloped (Severt et al., 2007). However, increased understanding of convention or conference attendee behaviour, including their decision-making process, is needed in the light of increasing competition among convention destinations and venues. In order to maximize numbers of attendees – and therefore maximize the multi-economic benefits to be gained by the host location as well as the benefits to be gained by the organizers – Zhang et al point to the importance of understanding how and why individuals make their consumption decisions (Zhang et al., 2007). This section will examine and discuss the research that has been carried out into the possible factors and variables that come into play in the decision-making process that meetings attendees may go through.

Severt et al's study aimed to explore the factors motivating attendees to participate in a conference or convention and to investigate the importance of these factors in attendee evaluation of conference performance and in the likelihood of attendees promoting the event to others and returning for the subsequent one (Severt et al., 2007). Their study is based on the belief that, because attendees have a large selection of meetings and exhibitions to choose from, and because the decision-making process is a lengthy one and influenced heavily by conference satisfaction or dissatisfaction, it is important to have a thorough understanding of the assessment process they use in attendance decision-making. This would lead to the possibility of enhancing the likelihood of return visits and positive word-of-mouth promotion through a design and promotion of meetings based on an understanding of what is important to participants.

The study was based on a limited selection of top motivators derived from an extensive review of the literature (Severt et al., 2007). Oppermann and Chon make the point that the first requirement in the decision-making process is recognition of the need to attend, and that this then leads to a 'transgression' through information search, assessment of alternatives, choice of product, and, finally, outcome and post-evaluation (Oppermann and Chon, 1997:184). The four general factors proposed by Oppermann and Chon in this

study were used by Severt et al in their research. They include: i) personal/business factors, such as financial considerations, state of health, time availability and family commitments; ii) association and conference factors, which include, for example, the relevance and importance of the association hosting the meeting, the likelihood of making influential contacts, continuing education, and so on; iii) location factors, looking at, for instance, accessibility, image of destination and climate; and iv) intervening opportunities, such as overlapping conference dates or even products that compete for the available money, like holidays. Severt et al (2007) also use the prime motivators for attendance at conference selected by Rittichainuwat et al: education, networking, career enhancement and travel to desirable locations (Rittichainuwat et al., 2001:405). Their factor analysis yielded five factors of importance to attendees in deciding whether or not to attend a conference, these being, in order of importance:

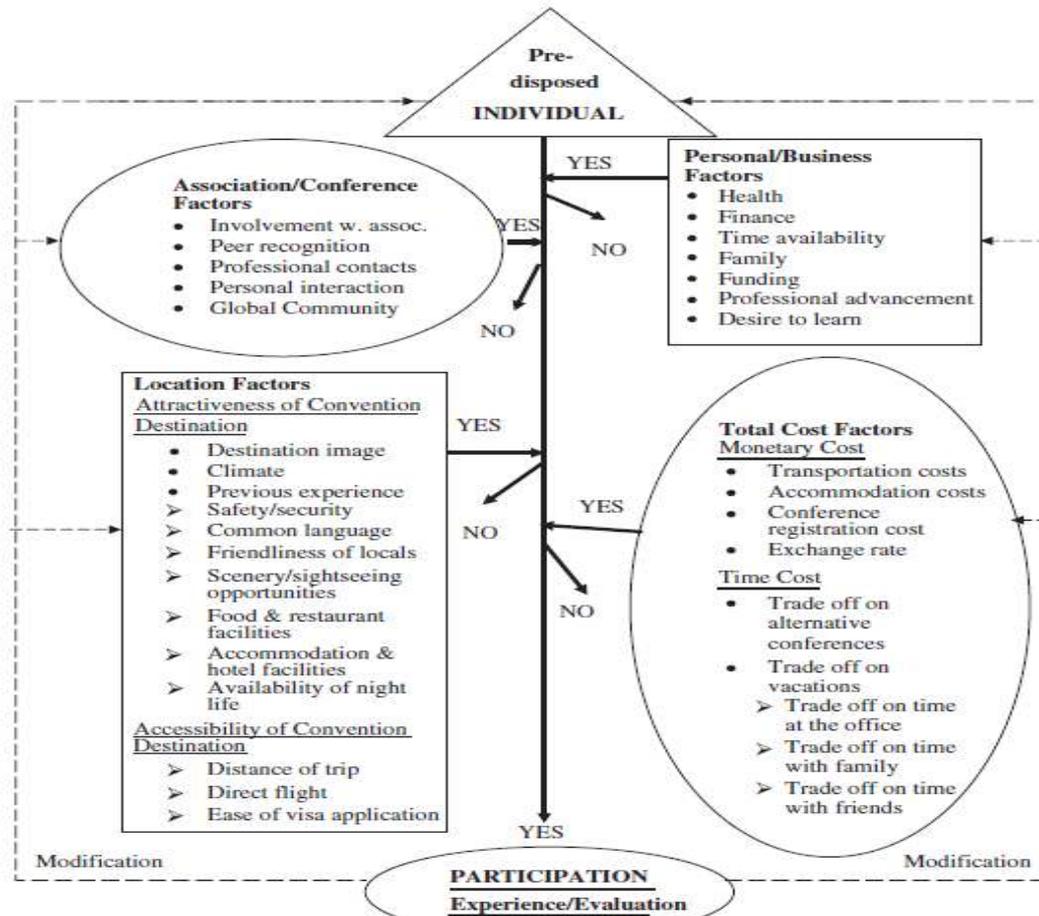
1. activities and opportunities;
2. networking;
3. convenience of the conference;
4. education benefits; and
5. products and deals.

Interestingly, similarities were found between these and the seven factors of importance to meetings planners when selecting a site found by Crouch and Ritchie's (1998), suggesting that the gap between planners and participants, with regard to the factors they base their decisions on, may not be too large.

With regard to their other aims, Severt et al found that satisfaction did indeed result from a higher performance rating being given to factors perceived as important, and this did lead to a greater likelihood to return and to promotion of the conference to others (Severt et al., 2007). Research carried out by Leach et al in a study aimed at ascertaining member's intentions to attend a conference, also found that post-attendance attitudes were the most important factor influencing intentions to attend a future conference, and intentions to recommend the conference to others (Leach et al., 2008). Severt, Wang, Chen & Breiter did emphasise however, the necessity of ascertaining motivating factors within the different convention markets; would education benefits, for instance, be as important to small business owners as to educators (Chen and Breiter, 2008)? They also

question the extent to which likelihood to return is affected by whether the conference is regional, national, or international and ask whether there are still more motivating factors that have yet to be isolated.

Zhang, Leung, and Qu worked to refine the model of the factors affecting convention participation looking at these factors from the perspective of overseas convention attendees (Zhang et al., 2007). Their study was based largely on Oppermann and Chon's 1997 model of the convention participation decision-making process, but also identified and incorporated influential factors from other studies. Their refined model altered Oppermann and Chon's original 'Intervening Opportunities' category to 'Total Cost Factors', further dividing this into i) Monetary Cost (looking at transportation, accommodation, registration, and exchange rate); and ii) Time Cost (maintaining Oppermann and Chon's 'Trade off on alternative conferences' and 'Trade off on vacations', but adding 'trade off on time at the office', 'trade off on time with family' and 'trade off on time with friends'. Further alterations were made to the 'Location Factors', with this category being divided into 'Attractiveness of Convention Destination' (and a further seven attributes added to Oppermann and Chon's original three) and 'Accessibility of Convention Destination' (with three attributes being isolated). The remaining categories ('Association/Conference Factors' and 'Personal/Business Factors') and attributes remained the same as in the original (see Figure 3.2 below for the refined model, which also indicates how the original has been added to). Zhang, Leung, and Qu suggest that conference organisers should concentrate their efforts on conference-related factors, such as career development, knowledge and opportunities for interaction (Zhang, et al., 2007).

Figure 3.2: Modified Model of the Conference Participation Decision-making Process**“Remarks”**

- Attributes abstracted by Zhang et al (2007) from the original Oppermann and Chon Model (1997)
  - Attributes abstracted by Zhang et al (2007) from other studies

Source: Zhang, Leung, and Qu (2007:1126)

A study conducted by Yoo and Chon aimed to develop a measurement scale of the factors affecting convention participation decision-making and ultimately established five representative dimensions with relevant indicators to measure each dimension: destination stimuli; professional and social networking opportunities; educational opportunities; safety and health situation; and travelability (Yoo and Chon, 2008).

Their study showed that destination stimuli is a factor in participation decision-making, especially if the attendee wishes to combine business and leisure. Relevant indicators include opportunities to visit the destination; extra opportunities available at the

destination; and the attractive image of the destination. This accords partly with Oppermann and Chon's (1997) location factors (with regard to destination image and climate) but fits more closely with Zhang Leung, and Qu's revision of this category to include a further seven factors under 'Attractiveness of Convention Destination', making the total ten (destination image; climate; previous experience; safety/security; common language; friendliness of locals; scenery/sightseeing opportunities; food and restaurant facilities; accommodation and hotel facilities; and availability of nightlife) (Zhang et al., 2007). This factor is also related to Rittichainuwar, Beck and Lalopa's category of 'travel to desirable locations' (Rittichainuwar et al., 2001), and to Severt, Wang, Chen & Breiter's 'activities and opportunities' category, which includes travel opportunities (Severt et al., 2007).

Consistent with previous research, Yoo and Chon confirm that 'professional and social networking opportunities' are the most influential variables in decision-making (Yoo and Chon, 2008). Indicators include opportunities to see people known in the field, opportunities for personal interaction with colleagues and friends, the development of a professional network, and involvement with the association. These variables mirror Rittichainuwar et al's (2001) identification of networking and career enhancement as prime motivators in the decision to attend, as well as reflecting Severt, Wang, Chen & Breiter's (2007) identification of the networking factor as a significant variable and Oppermann and Chon's (1997) – and later, Zhang Leung, and Qu's (2007) broad category of 'Association / Conference factors' (including involvement with association, peer recognition, professional contacts, personal interaction, and global community). Jago and Deery's research into what attributes of a convention are important to delegates when judging it also found that the opportunity to network and the content of the conference were key drivers (Jago and Deery, 2006). 'Educational opportunities' include opportunities such as keeping up with changes in the profession, listening to respected speakers, the actual topic of the convention, and fulfilling the desire to learn. Rittichainuwar et al. (2001) identified education as the most significant motivator for conference attendance, Severt, Wang, Chen & Breiter (2007) placed education opportunities in fourth place out of five, and Zhang, Leung, and Qu agreed with Oppermann and Chon (1997) that a relevant attribute in their 'Personal / Business Factors' category was 'the desire to learn'. Jago and Deery, in their study, 'Relationships

and Factors influencing Convention Decision-Making’, found that there was consensus among the associations, Professional Conference Organisers and delegates that the most important element of a good convention was that there was a ‘sound, innovative and challenging education program’ ( Jago and Deery, 2005:33).

Factors in the ‘safety and health’ category include the situation regarding safety and security at the convention. This concern could be a result of increased tension over terrorism, according to Yoo and Chon (2008). Other factors include hygiene standards at the destination, and the actual state of health of the attendee – whether he or she is fit to travel, this latter variable reflecting Oppermann and Chon’s inclusion of the ‘health attribute’ under the Personal / Business category (Oppermann and Chon, 1997).

The final category of ‘travelability’ brings together a range of variables under the one heading. Measurable factors in this category include the time required to travel, the total cost of attending and the attendee’s own personal financial situation. It accords with Zhang Leung, and Qu’s switch in category from Oppermann and Chon’s (1997) ‘Location factors’ (with the variables of accessibility and cost of transport and accommodation) to the sub-category ‘Accessibility of Convention Destination’, and their addition of the three attributes of distance of trip, availability of direct flights, and ease of visa applications (Zhang et al., 2007). This dimension also reflects the variables included under Severt, Wang, Chen & Breiter’s (2007) ‘convenience of the conference’ factor.

What sets Yoo and Chon’s study apart from others in the field of convention tourism and participation decision-making is their incorporation of attitudinal aspects and of an evaluation stage in the process of deciding whether or not to attend (Yoo and Chon, 2008). With regard to attitude, Yoo and Chon say the process can be explained by the expectancy-value model and that the focus is therefore on the attitude towards convention participation rather than on the attributes of a particular convention; it is possible to like the sound of a convention but not to be thinking of it in terms of participation and what can be gained from it. They see convention participation decision-making as a rational and systematic behaviour, involving cognitive evaluation of the high costs of attending a convention and the uncertainty over the consequences of attendance; the process, they say, is funnel-like, with choices influenced by socio-psychological factors (such as

attitudes, values, motives and personal characteristics) and non-psychological factors (such as product design, price and advertising).

Overall, the process of decision-making with regard to conference attendance can be seen from the research to potentially involve consideration of a range of factors. Much of what has been briefly covered in this overview of the factors influencing the decision-making process will be considered in more detail in the following section of this chapter, including literature exploring the effects of location factors such as image and extra-conference activities, as well as factors connected to travelability and safety and health. The first, fourth and fifth dimensions in Yoo and Chon's findings (that is, Destination Stimuli, Safety and Health Situation, and Travelability) will be used as categories around which the second part of the chapter will be structured (Yoo and Chon, 2008). It is important to point out, however, that although these categories have been 'lifted' from Yoo and Chon's study, for the purposes of the review in this chapter, these categories are broadened somewhat to include other dimensions brought to light in other studies. It is also important to note that a number of factors brought to light in the research into decision-making are not explored in this study; the author is most interested in what would make Saudi Arabia a destination delegates would choose to travel to, and what would deter them, and therefore the more personal variables that affect the process of making a decision, for example, and factors concerned with the conferences themselves are not relevant in comparison with the location factors (see Figure 3.2 above).

### **3.3 Specific Factors Influencing Event Site Selection and the Decision-Making Process**

Research has been carried out separately into many of the factors above that are considered to be relevant to the site selection process and the conference attendance decision-making process. The purpose of this section is to give a more comprehensive overview of the literature on specific factors. Some of the areas discussed have been shown in the above overview to be important to both attendees and meeting planners/buyers. This second section is divided into three parts, broadly based on three of Yoo and Chon's five categories. The first part will consider research carried out into destination stimuli. Crouch and Louviere assert that:

‘It is not enough now to compete largely on the basis of accessibility, infrastructure and cost. Destinations need to create unique combinations of attributes to develop strong competitive positions, and they must do so using an intimate knowledge of the factors that associations value most in their site choice decisions.’ (Crouch and Louviere, 2004:128)

Included within this category are all factors related to the destination which may have an effect on site selection and/or attendance decision-making. These are reviewed under two headings: ‘location factors’ (in which research into the image of the destination, the opportunity to travel afforded by the conference being held in a desirable location, the site environment, and opportunities available at the destination - for entertainment, sightseeing, and so on - will all be discussed) and ‘venue factors’ (in which research into meeting facilities, accommodation, service quality, general facilities and levels of organization will be reviewed). All the factors considered were differentiated in the research overviewed above into the two processes of site selection and conference attendance decision-making (Oppermann and Chon, 1997; Rittichainuwat, Beck and Lalopa, 2001; Severt, Wang, Chen and Breiter, 2007; Breiter and Milman, 2006; Zhang, Leung and Qu, 2007; Yoo and Chon, 2008; Oppermann, 1996b; Crouch and Ritchie, 1998; Crouch and Louvière, 2004; Chen, 2006; and Ladkin, 2006).

The second part will focus on the factors affecting how easy it is to travel to the destination, taking into account cost factors and accessibility factors. The third and final section will consider research carried out into the area of safety and security.

### **3.3.1 Location Factors**

Witt, Sykes and Dartus in their work on forecasting international conference attendance, argue that the characteristics of a location which may influence a potential conference participant are likely to be similar to those of holidaymakers, thereby including such attributes as climate, activities, location, safety, and so on (Witt et al., 1995). Jun and McCleary’s analysis of destination selection factors revealed a number of variables that accord with the importance of the location providing extra-conference opportunities similar to those required by holidaymakers: sightseeing, cultural, and historical

attractions, the political environment, the popular image of the location and the availability of recreation facilities and of nightlife activities, and the climate (Jun and McCleary, 1999). This section will firstly explore the literature on the image of the destination and location, before considering other macro, but more practical, aspects of the location (including the site environment, extra-conference opportunities) which serve to make it attractive, or not, to planners and potential delegates.

### 3.3.1.i Image

Scott Taylor, the Chief Executive of the Glasgow City Marketing Bureau, commenting in October 2005 for Davidson and Rogers states in no uncertain terms his view of how important the image of a destination is in its success.

‘Glasgow understands that 80% of the decision making process by a conference organiser is influenced by the image of the destination ... Organisers will only ever select a destination if it has a positive image. The destination has to attract delegates to it. If it fails to do this, convention registrations will fall and convention income will be compromised.’

(Taylor, 2005, cf. Davidson and Rogers, 2006:174)

He states that ‘Destination imaging is now recognised as the primary driver for demand’ and argues that price is definitely a secondary consideration, despite what some research might suggest; organisations will not select certain destinations, irrespective of how cheap they are, if they know that delegates will not be attracted to attend conferences there (ibid.).

Davidson and Cope had already pointed to this view with their assertion that ‘[t]he perception of any destination will always have a strong influence on the decision of whether to hold a meeting there’ (Davidson and Cope, 2003:111). Their belief is that any destination that either lacks a particular image or has a negative image will need to struggle to appeal to the meetings market. Clark and McCleary also propose that ‘unless a city is in an association’s evoked set, it doesn’t have a chance of being selected’, pointing to the necessity to promote a destination and establish a positive image (Clark and

McCleary, 1995:66). Greaves believes that people choose a destination because of the destination itself, not because of the venue (Greaves, 1998, cf. Bradley et al., 2002) and Zelinsky goes further in arguing that the reputation and image of a destination is enormously important, and that perceptions of the destination, whether subconscious or not, have a distinct impact on whether a destination is chosen or whether delegates choose to attend (Zelinsky, 1994). However, as Bradley, Hall & Harrison point out, it is difficult to identify evidence that positive image is a significant 'pull factor'; what seems easier to prove is that a negative image acts as a considerable 'push factor' (Bradley, et al., 2002).

Oppermann's study of the relative importance of destination attributes according to meetings organisers, ranked city image as ninth out of fifteen attributes, and opportunities for sightseeing and scenery as thirteenth, as against quality of service and provision of facilities, which were ranked first (Oppermann, 1996b). Var et al. found that accessibility is more important than attractiveness when choosing a destination (Var et al., 1985). Image seems to have been defined as how attractive a destination is, rather than in the way defined by Govers et al (2007), Jenkins (1999), and Lawson and Baud-Bovy (1977) below. This can be useful when considering the area of how attractive a destination is to participants and how best to promote that destination; Hiller, for instance, argues that the further away from 'home' the meeting is, the more likely it is for it to be packaged around the destination (in terms, for example, of theme events based on the special characteristics of the host region, or pre- and post-conference tours) in order to enhance attendance (Hiller, 1995). However, research into the effects of place promotion, destination image and destination branding brings to light far more complex and broader understandings of what image entails and the effects it can have on the success or otherwise of a destination. It seems that the image formed of a destination will have a strong influence both on planners' decisions to select a site at particular destinations and delegates' decisions regarding whether to attend a conference or not. The actual impact the image has, however, has been contested, partly because of the lack of research that has been conducted specifically into this factor.

The richness of work on image and place marketing (see, for instance, Tasci and Gartner, (2007); Pike, (2002); Baloglu and McCleary (1999)) is not mirrored by the research and theory-building work done in the area of conference tourism, reflecting the relatively

young nature of this field. Clearly, if image does impact considerably on the decision-making process, then meeting planners need to be aware of what images of a particular destination are held by potential attendees and what are perceived to be important attributes of a destination; the more a planner chooses a destination which ‘fulfils the association’s needs and expectations’ (Hu and Hiemstra, 1996:65) the more likely they are to provide the best meeting package available for their members and therefore to maximise meeting attendance. A clear definition of what exactly ‘image’ is, however, is essential if substantial and meaningful research is to be undertaken.

Discussion of the meaning of the term ‘image’ in leisure tourism research literature is particularly useful and has relevance to the research that has been conducted into the role of image in the areas of site selection and attendee decision-making processes. Reynolds describes the formation of image as being the development of a mental construct built on a few impressions chosen from a flood of information (Reynolds, 1965). In their research into this area, Govers et al reduce this ‘flood of information’ by placing it in categories showing the sources of the information, these including: promotional literature on the destination; the opinions of others; reporting in the media; and general culture (TV and radio programmes, for example) (Govers et al., 2007:15). They argue that these images are based on ‘... attributes, functional consequences (or expected benefits) and the symbolic meanings or psychological characteristics that consumers associate with a specific destination ...’, and that the ‘... tourism destination images projected in information space will greatly influence the destination images as perceived by consumers.’

However, what ‘image’ means exactly is still unclear. Pearce sees ‘image’ as a term with ‘vague and shifting meanings’ (Pearce, 1988:162) and Jenkins (1999:1) discusses this in more detail, looking at what it refers to in different disciplines (Jenkins, 1997:1). Psychology, for instance, is seen to use the term with regard to visual representations of a thing or place, whereas in the discipline of geography, it includes all associated impressions, knowledge, emotions, values and beliefs. Interestingly, in the area of marketing, what is focused on in work connected to ‘image’ are the attributes connected to the thing, place or person being marketed and the ways in which image is related to consumer behaviour. This is what seems to form the basis of most research on the effects of image on site selection for conferences and on potential delegates deciding whether to

attend a conference or not. Jenkins finally, relies on Lawson and Baud-Bovy's definition of destination image as 'the expression of all objective knowledge, impressions, prejudice, and emotional thoughts an individual or group might have of a particular place' (1999:2), as it focuses attention not only on individuals' perceptions but on those shared by members of a particular group (Jenkins, 1999:1). This definition, and the understanding that it is often attributes that are focused on in marketing-based research, is the one that forms the basis of the discussion in this section.

Bradley, Hall and Harrison's research into promoting new images for cities involved in meetings tourism is contextualised within the broader theme of the transformation, development and rejuvenation of post-industrial cities (in this research, cities in the UK) as a means of attracting jobs, tourists and residents (Bradley et al., 2002:103). They point to a lack of a focus in previous research in this area being: the impact that the promotion of place has on the location decision-making process of intended audiences; and the tangible impacts of place promotion on the urban development process. The author has been unable to find literature specifically aimed at considering the former either in terms of the promotion of international conference destinations, as opposed to 'place' generally, or the effect this has on both buyers and delegates.

Bradley, Hall & Harrison's research into six British towns and cities suggested that image was important in the decision making process of meetings organisers; the organisers questioned said it was a significant factor informing their decisions (Bradley et al., 2002). Different cities were seen to have an attractive image for different reasons: Glasgow, for instance, was perceived to be culturally vibrant and Manchester to have a good nightlife. Interestingly, it was suggested that the on-going image of Birmingham as architecturally poor showed that deeply seated perceptions of places persist. More noteworthy was that the findings indicated that if a city was lacking in a strongly discernible image, this in itself could be a deterrent, suggesting the need for more focused marketing of a city and what it has to offer. This suggests that attendees – and planners – need some kind of substantial image of a destination, with a range of accompanying attributes, to base their decision-making process on; if they know very little about a destination and have no ideas to work from, they are probably more likely to choose one that they do hold a certain image of. It seems necessary therefore, that for a city to succeed as a conference destination, it needs to actively develop and promote an image.

The promotion of that image will result from the four ‘sources’ of information pointed to by Govers, Go and Kumar: i) promotional literature on the destination; ii) the opinions of others; iii) reporting in the media; and iv) general culture (TV and radio programmes, for example (see the first paragraph in this section) (Govers et al., 2007).

Hankinson’s study also looked at the promotion and transformation of post-industrial cities as business tourism destinations (Hankinson, 2005). Hankinson found that the development of positive brand images has led to the successful transformation of several post-industrial cities. The study looked at 15 UK business tourism destinations and was based on interviews with the events managers of 25 large corporations, professional bodies and business events agencies followed by questionnaire completion by these participants regarding these destinations. The study aimed to explore the attributes associated with the image of the different destinations and to consider the relationship both between these and the business criteria used to select a destination, and between these and perceived quality. The brand image attributes were divided into three groups: overall destination attractiveness, functionality, and ambience, all of which correlated positively with the perceived quality of the destinations. Hankinson concludes that, in marketing a destination image, destination marketers should incorporate brand image attributes associated with leisure tourism alongside those associated with business tourism. One of the research questions involved exploring whether there was a relationship between the image of a location and perceived quality. The results indicated a strong association between overall destination attractiveness and perceived quality, as well as highlighting how events managers are strongly influenced by functional attributes such as the quality of the conference facilities, the quality of the hotel accommodation, and so on. The attributes termed in the study as ‘ambience’ attributes (experiential attributes such as how it feels to use the product or service, or whether the need for stimulation is met, for instance) were less strongly related to perceived quality but still seemed likely to play an important role in the selection process.

Whereas the research conducted by Hankinson (2005) and Bradley, Hall and Harrison (2002) was aimed mainly at exploring the importance of image in attracting business, Baloglu and Love’s study looked at the actual images meeting planners had of a number of cities and considered what attributes and perceptions formed these images (Baloglu and Love, 2005). They elicited the structured and unstructured images of five major US

convention cities from meeting planners and took into account not only attribute-based perceptions (which they term ‘cognitive’), but also affective perceptions (how planners feel about the places), as well as overall perceptions, using closed and ranking questions as well as open-ended questions asking for the images participants had of, and characteristics they attributed to, each of the five cities. Their study found that perceptual dimensions in the evaluation of meeting destinations play an important role and should be considered by these cities in terms of target marketing, positioning, and communication strategy. Hosany, Ekinici and Uysal’s research into ‘Destination image and destination personality’, also found that affect, and personality dimensions, as well as cognitive dimensions, were evident in consumers’ evaluation of destinations; they advise that destination marketers should focus on the ‘emotional components of the destination image’ in order to ‘emphasize the distinct personality’ of that destination (Hosany et al., 2006). The extent to which the emotional aspect is important to meeting planners in their perceptions of appropriate meeting destinations, and in comparison with the importance it plays in attendees’ decision-making process is, as yet, unresearched. However, the Baloglu and Love study provides a framework and methodology for research into other convention cities which takes into account a wider range of variables than other studies (Baloglu and Love study, 2005).

Lee and Back criticize previous research into image, saying that although it illuminates the role of image in meeting participation, it does not examine in detail the causal relationships between image and participation, particularly not from the perspective of attendees (Lee and Back, 2007:61). Lee and Back’s research focuses on potential attendees and aims to examine what attributes are considered important by them, looking at the causal relationships among destination attribute strength/evaluation, destination image, and meeting participation (ibid.: 97). Their research is based on 245 responses to a questionnaire measuring these three factors, completed by members of the International Council on Hotel, Restaurant and Institutional Education (CHRIE) after the announcement of the annual conference in Las Vegas, USA.

Lee and Back (2007), similarly to Oppermann (1996b) and Um and Crompton (1992), used the destination belief structure to explain the formation of destination image, in light of Um and Crompton’s operationalization of destination beliefs into two categories: the first measuring the strength of the belief about each attribute used to evaluate a place as a

possible destination; and the second measuring the extent to which certain attributes were believed to exist in prospective destinations. The finding showed that what actually formed the destination image of participants was the expected performance of the destination attribute rather than its importance. The three attributes ranked most highly by the respondents (in accordance with previous studies) were accessibility, safety / security and hotel facilities, all of which were expected by CHRIE members to perform well in Las Vegas. This indicated a close association between the constructs of expected performance of particular attributes, and image of the destination, which, in turn, was found to have significant effects on intention to participate. The implications of this for associations and for marketing of destinations is that image plays a significant role in intentions to participate and that the image is based mainly on whether or not the destination is expected to deliver on attributes which are considered important by potential delegates. However, as yet, no other studies have been undertaken that substantiate these findings. Neither has any study been carried out into perceptions of attribute performance in international destinations and the effect of this on meeting participation – what is the relative importance given to attributes in an international destination in comparison with those in a domestic destination?

In light of the research aims of this particular study, and the geographic area it is exploring, it is important to also consider in this section the effect of terrorism on the image held of a country or destination; and the extent to which an image involving potentially reduced levels of safety and heightened perceptions of risk, for instance, might impact on the decisions of planners to select a destination and delegates to attend a conference. The response of the tourism industry in the Arab world to negative publicity generated by the terrorist attacks was to promote and market within-region tourism (Al-Hamarneh and Steiner, 2004); this acts as proof, however, that the general tourism industry was affected by the negative publicity. Al-Hamarneh and Steiner do state that, as a result of the September 11 attacks, the images of Arabs, Muslims, and Islam have ‘suffered immensely’; they go on to propose that because the terrorists were of Muslim and Arab origin, this ‘gave a major push to racist attitudes in western societies’. (Al-Hamarneh and Steiner, 2004:174). The extent to which this may have impacted on the decisions made by potential delegates to attend a conference in the Arab world is unresearched.

The fact remains, however, that there has been little research into the image held of Middle Eastern destinations and the positive or negative impact these images may have on people visiting the region for business or conference purposes. There is also a lack of literature looking at the images of emergent destinations.

### **3.3.1.ii The Site Environment**

One of the primary categories distinguished by Crouch and Ritchie (1998) is that of the 'site environment'. Attributes they found to be associated with this category included the desirability of the destination's climate, the attractiveness of the destination's surroundings, the suitability and standard of local infrastructure, and the extent to which the host organizations and community excel in welcoming visitors. Khadaroo and Seetanah evaluate the role of transport infrastructure in international (leisure) tourism development and find it to be important (Khadaroo and Seetanah, 2008). The role of transport infrastructure in conference tourism, however, seems to be more important in considerations of extra conference opportunities (see discussion below, under 'extra Conference Opportunities'). The same could be said of climate; if the climate is seen as a pull factor for attendees, this is probably because it is associated with leisure activities (skiing, for example, or the potential for time in the sun) and is therefore more relevant to the 'Extra Conference Opportunities' section. With regard to general infrastructure, Shonk in his research into sports events tourism indicates the need for ease of access to rooms, restaurants, taxis, and public transport stations, as well as the need for effective signage around the site of the venue and/or the accommodation. Similarly, he points to the location of the hotel as being a source of satisfaction, or not, with the site, saying that proximity of the hotel to the, in this case, sporting, venue is an important consideration (Shonk, 2006).

### **3.3.1.iii Extra-Conference Opportunities**

The area of extra-conference opportunities, the final focus in this 'location factors' section, has received growing attention in the literature over the last decade and has been shown in many studies to be a significant factor in delegates' and planners' decision-

making processes. Yoo and Chon's measurement scale for factors affecting convention participation listed 'extra opportunities available at the destination' under the dimension of destination stimuli (Yoo and Chon, 2008). Although they emphasise that the most influential variables in conference participation decision-making (both in their study and others) were convention-related factors (such as education and professional improvement, professional contacts and personal interaction), the destination itself and what it promises the delegate in terms of enjoyment, are significant 'pull-factors' and they say this is particularly so when attendees are looking to combine business and leisure (Yoo and Chon, 2008).

One of the extra opportunities potentially available and exploitable by delegates is simply the opportunity to travel to that particular destination, particularly if it is seen as safe, 'exotic' and accessible, as asserted by Jago and Deery (2005:33) (see 3.2.1 above). The associations in their study were aware that the opportunity for delegates to travel to a particular destination, if it is perceived as being of interest and exotic to them, acts as a considerable motivation to attend a conference. Smith and Garnham claim that association delegates are more likely than convention delegates to undertake pre- and post-convention travel (Smith and Garnham, 2006:4) and Davidson argues that business travellers may often decide to extend their trip because it might be seen as being a once-in-a-lifetime opportunity to visit a particular place (Davidson, 2003). No research studies on the extent to which this factor acts as a 'pull-factor' in the decision-making process of attendees, or the extent to which it is taken into account by meeting planners when selecting a site, has been found. Neither has any research been found that considers the effect of a conference being held in the same place – and whether the pull factor of the destination only influences decisions when it is the first time a place has been visited. It seems reasonable to assume, however, taking into account cost and time factors and the type of meeting being planned, that a destination which appeals to delegates is likely to act as a strong positive motivator in the decision-making process and therefore in the site selection process.

Once at the site, extra-conference opportunities include sightseeing, entertainment, nightlife, recreation and shopping. A greater focus on the area of mixing work and leisure has been apparent in the last decade and is significant in the choice of destination by

meetings planners as a means of attracting attendees and in the decision-making process of potential attendees, who may see the opportunity to combine pleasure with work as being a deciding factor in whether or not to attend a meeting or to return to one. Although factors connected to this area have been isolated in site selection research and decision-making research (see Sections 3.2.1 and 3.2.2 above), very little research has been found that looks specifically at the extent to which these factors impact on those two processes. Davidson investigates the *ways* in which delegates might incorporate extra conference opportunities into their conference experience and the factors affecting whether or not they do so (Davidson, 2001, 2003, 2006).

Davidson & Cope in their research into the *ways* in which travel for business purposes is combined with leisure and recreation activities, focus firstly on the ‘travelling professional workers’ type described by Uriely in his delineation of types of travellers (Uriely, 2001; Davidson and Cope, 2003). Uriely characterises this group (comprising business people, employees of various occupations such as members of academic and diplomatic staff, and professional athletes, and so on) as being career-oriented, highly skilled, and well-rewarded in economic and prestige-related terms, with their working activity being ‘repeated across various sites and seen as part of routine working life’ (2001:3); he perceives them as being more likely to apply an instrumental orientation to business travel and to perceive tourist-based activities as by-products. Davidson & Cope found that one way for this group to mix work and leisure is for them to *extend* their trip before, during or after the meeting that is the primary purpose of the trip (Davidson & Cope, 2003); for those professionals with high expendable incomes, they suggest that some stay because it seems reasonable to stay and spend some of this income at the destination. They cite Dryle and Nathan as positing that many of these professionals see an extension as a trade-off for the intensive and long haul travel they have to do, and that they habitually see these business trips as triggers for short breaks (Dryle and Nathan, 2001 cf. Davidson & Cope, 2003).

A second way in which leisure might be incorporated into the conference experience according to Davidson, is when delegates bring guests who engage in the parallel activities organised specifically for them. Thirdly, Davidson suggests that attendees may simply engage in leisure and recreation activities during the period of the meeting – taking advantage of what is offered in the organised social programmes (such as gala

evenings, excursions, and so on). Finally, Davidson & Cope talk about those travellers who *return* to the destination at a future date, particularly if their experience of it has been positive, they are not over-familiar with the place and what it offers, and they feel they have not yet done everything they would like to do there (Davidson and Cope, 2003).

An area of research carried out by Davidson into the area of extra-conference activities concerned the decision-making process and aimed to determine whether conference attendance leads to business trip extensions (Davidson, 2001). The first factor Davidson considered involved the characteristics of delegates most and least likely to make use of the leisure and recreation facilities on offer, these including: whether the delegate was self-funded; whether he or she was single; whether they were familiar or not with the destination; were native or not to the destination; were accompanied; or/and were with friends at the destination. Abbey, in his literature review of the area of conventions and meetings, suggested a future avenue for enquiry as being to look at the role that spouse attendance may play in the process of making the decision to attend a conference (Abbey, 1987); Wiswell (1986) and Rogers (1988) point out that the participation of partners could be indicative of increased importance of amenities and other-than-meeting attributes when decisions are made to attend conference. Davidson and Cope cite Oppermann as estimating that in the USA, around a third of attendees travel with a guest (Oppermann, 1996b cf. Davidson and Cope, 2003:258); figures taken from the BTF BTAC report suggest that in the UK, between twenty and thirty per cent of delegates may bring accompanying persons (BTF and BTAC, 1999, cf. Davidson and Cope, 2003:258). Drache points out that because of shared costs, for rooms and hire cars, for example, the price of an accompanying guest does not double the outlay – a further advantage of taking a guest (Drache, 2000).

A second factor investigated by Davidson took into account aspects of the conference itself, particularly: the type of meeting (whether it was association or corporate, with the association meeting being seen as more ‘relaxed’ and more likely to lead to extensions); the length of the conference; the timing in terms of when during the week it is held (with attendees at mid-week conferences being less likely to take a day or two off work in order to extend their visit); the timing in terms of which time of year the conference is held (and how this might impact on attendance and extensions because of, for example, school

holidays); the timing in terms of whether the conference might coincide with a particular sporting or cultural event at the destination; the degree to which excursions are already included in the official programme; and whether or not a guest programme is included in the conference (Davidson, 2001).

The third factor in Davidson's study of whether conference attendance leads to business trip extensions focused on factors connected to the actual destination: the image of the destination (also taking into account how safe it is perceived to be and how expensive), which plays the determining role in delegates' decisions to extend their visit; how far it is from the delegates' homes; the ease and cost of transportation in and around the destination; and the amount of tourism information provided to delegates. With regard to the provision of information to leisure tourists on local places of interest, Ortega and Rodriguez found that both domestic and international tourists attributed great importance to being given this (Ortega and Rodriguez, 2007). In order to promote a destination, Jago and Deery argue that it is important that delegates have the time and opportunity to explore it and one way of facilitating this is by providing delegates with useful tourist information (Jago and Deery, 2006).

This section on 'location factors has focused on' the-limited- research undertaken into the extent to which, and ways in which, destination stimuli influence site selectors and delegates going through the decision-making process, yet has pointed to the many attributes of the destination which can act as 'push' or 'pull' factors. A destination's image has been shown to be highly influential, although research is still needed into the extent to which international conference attendees choose to attend a conference because of the image of the place in which it is held and because of the opportunities it might afford them other than those offered by the educational and networking opportunities which are inherent in the conference itself. The following section will switch from this consideration of the research carried out into the macro factors of the destination to a focus on the micro factors of the venue itself.

### 3.3.2 Venue Factors

With regard to destination stimuli, not only are the macro factors discussed above relevant to the site selection and participation decision-making processes, but so too are factors concerning the actual venue. A study carried out by Comas and Moscardo found that the venue, whether it is a meeting facility or accommodation, was ‘a critical attribute’ when planning a conference (Comas and Moscardo, 2006:136). Research into this area often converges with research into site selection, although certain studies do distinguish between the micro aspects of the venue and the macro aspects of the site and destination.

Much research carried out into the venue has again focused on national and regional conferences rather than international ones. However, when studying the criteria used to select venues, research has shown that a number of variables impact on these. Davidson and Rogers point to how criteria can change in relation to a number of factors: ‘destination and venue selection criteria may show some variation from year to year, and also from country to country, dependent upon economic, political, social and technological factors’ (Davidson and Rogers, 2006:174). A further variable concerns whether the meeting is one organised by the corporate sector or by the association sector. Davidson and Cope point out that the association’s focus tends to be on value for money (this criterion coming in sixth position for corporate buyers), whilst the corporate sector tends to place high quality premises in highest position (with the ‘quality of conference facilities’ coming in seventh place for association buyers) (Davidson and Cope, 2003). However, whether this finding is based on associations with national memberships or on associations with international memberships (which may be wealthier) is unclear, as is the size of the associations or the corporations investigated in the research. Criteria used for selecting a venue for an international conference may also be affected by the availability of venues that exactly match the requirements of the meeting, in terms, for example, of size and facilities.

Another variable concerns whether the criteria are based on what delegates perceive as important or what planners perceive as important. Jago and Deery, in their research into the relationships and factors influencing convention decision-making, take into account the views of planners, intermediaries and delegates (Jago and Deery, 2005:33). They

found that, although the two former players considered the venue to be an important factor, the delegates did not list this factor. Jago and Deery surmise that this is possibly because delegates expect that the venue will be suitable and ‘venue issues only become important when there are problems (ibid.: 33).’ Ladkin notes that ‘poor service quality plus an inadequate standard of furnishings and facilities are cited as the most common causes of dissatisfaction’ and adds that it is of paramount importance that the more ‘discerning conference attendees’ are provided with good facilities and service quality as well as an environment which suits their needs and expectations (Ladkin, 2006).

With regard to planners, or, at least, those responsible for selecting a venue, Ladkin points out that a range of research has been carried out into what criteria are used in the selection process (Oppermann, 1996b; Crouch and Ritchie, 1998; Comas and Moscardo, 2006), the findings of which are similar (Table 3.1 below gives an overview from Ladkin of which factors are considered important in venue selection and which in venue satisfaction) (Ladkin, 2006). Weber and Chon note that of all the research carried out, very little has been rigorous and very little has been carried out into the complex area of trade-offs between different factors, that is, looking at whether certain venue attributes might be seen to compensate for other missing attributes; (they cite only Hu and Hiemstra (1996), and Renaghan and Kay (1987) as research that has looked into this) (Weber and Chon, 2002b:65). What makes this area somewhat more complex is that the research that has been carried out has not considered the venue as a separate factor to be studied, but as one of the many factors connected to the broader area of destination. Whereas the availability of a suitable venue (one with the right sized meeting rooms, for example, or the capacity to accommodate the number of attendees) must influence the selection of a destination to a large extent, Davidson and Cope argue that the destination tends to be chosen before the venue is selected (Davidson and Cope, 2003:110). Weber and Chon suggest that:

‘Convention destinations need to consider all potential site selection factors to avoid the pitfall of assuming that it all depends on the size and design of a convention centre facility and the range and quality of accommodation available.’  
(Weber and Chon, 2002a:65)

They argue that accessibility and the availability of pre- and post-conference recreational or holidaying opportunities are also important considerations.

Table 3.1: Important Elements in Venue Selection and Satisfaction

Venue selection	Venue satisfaction
Cost	Value for money
Location and access	Good service quality
Time and duration of conference	High-quality food and beverages
Technical requirements	Audio-visual capabilities
The size of the conference	Availability of breakout rooms
Configuration of rooms	A high ratio of space to participants
Destination image	Control of lighting, ventilation and temperature
Leisure opportunities	Social programme and sightseeing opportunities

Source: Ladkin (2006:60)

As mentioned above, delegates themselves may not freely list the venue as a deciding factor in whether to attend a conference or not and there has been very little research into identifying the needs of attendees at large convention centres, or into assessing the importance they give to select venue facilities, attributes and services. The research that *has* been carried out into delegates' evaluation of venues and what they consider to be the most important attributes, includes that undertaken by Breiter and Milman which compared the needs of attendees regarding services with the actual priority given to those services (Breiter and Milman, 2006:54). There were significant differences between these, indicating a lack of attention to the priorities and needs of delegates in this area. Out of the nineteen facility features studied, twelve of these were shown to have negative performance gaps: these included directional signage both to and within the convention centre, the availability of high quality accommodation near the centre, telecommunications, food services and availability of seating in the centre. Breiter and Milman conclude their report by pointing to the usefulness for management of convention centres of knowing the needs and wants of their customers and, by meeting them, raising the likelihood of these customers returning (Breiter and Milman (2006:54).

Wu and Weber's study assessed the perceptions of delegates with regard to the facilities, attributes and services of convention centres, and found that availability of ventilation, availability of state-of-the-art audio-visual equipment, comfort of seating, adequacy of restrooms and helpfulness of staff were considered to be the most important attributes (Wu and Weber, 2005). The particular convention centre they evaluated, although it performed well in highly important areas such as facilities and service quality, was found to be a low performer in certain other areas perceived to be important (such as directional

signage and language ability of the venue staff). The centre responded immediately to the need for improvement.

One of the key findings in Whitfield's research into the strengths and weaknesses of service quality at venues in the UK was that venues perceive high levels of service and customer-oriented staff as the most important conference service offered to the delegate, and a way of attracting repeat visitation (Whitfield, 2005). Davidson and Cope also point to excellent service as being a key factor in the success of the venue market. They state that venue staff should be able 'to provide accurate information, demonstrate creativity and resourcefulness, and draw on first-rate organisational skills', (Davidson and Cope, 2003:109) and Shallcross says that 'Competent staff and overall reliability are key qualities, often over cost' (Shallcross, 1998:B51). Jago and Deery's research into the attributes of successful conventions as perceived by delegates to an international convention found that organization was rated highly: They quote one delegate as saying '[t]he organization and facilities have been tremendous. The organization is outstanding' and another, similarly, as saying 'I would recommend Australia as a conference destination, because the organization of the facilities in Australia is exceptional' (Jago and Deery, 2006:21).

Clearly, it is not enough to evaluate only the needs, requirements and criteria of meetings buyers and planners when working to enhance the service and standing of convention centres; their understanding of what is necessary and what leads to attendee satisfaction may be influenced by factors that are, in fact, not so relevant to the attendees. An understanding of what attendees need and what factors influence their perceptions could contribute enormously to centres being able to maintain and increase their business. Ideally, planners and meeting buyers would have a thorough understanding of what their members' needs are. The Joint Meetings Industry Council (JMIC) argues that the meetings industry suffers when 'facilities and services are unable to meet international standards', a point which Lee and Back make more positively by noting how '[p]ositive experiences with the conference venue contribute to overall satisfaction with the conference' (Lee and Back, 2008:335).

Having focused on destination stimuli in this section, noting that both the macro factors connected to the location, its image and what extra opportunities it offers the delegates, and the micro factors regarding the details of the venue, in terms of facilities, quality and service, it is clear that, as the Joint Meetings Industry Council (JMIC) points out, ‘the “total experience” is of increasing importance’.

### **3.3.3 Travelability**

Added to those characteristics of a destination which may act as stimuli to encourage delegates to attend a conference, and therefore as stimuli to encourage planners to select a particular site, are the practical considerations of how accessible a location is and the cost of accessing it. Research into those factors connected to travelability listed above under site selection (see Section 3.2.1 above) and the decision-making process (see Section 3.2.2 above) will be explored in the following section.

#### **3.3.3.i Accessibility**

Var, Cesario and Mauser found that accessibility is more important than attractiveness when choosing a destination (Var et al., 1985:194). As far as accessibility is concerned the factors found from the research to be relevant include: the distance of the trip (Zhang et al., 2007) and the time required to travel (Yoo and Chon, 2008, Severt et al., 2007); the availability, convenience and frequency of direct flights (Zhang et al., 2007, Crouch and Ritchie, 1998; Oppermann and Chon, 1997); and the ease of visa applications (Zhang et al., 2007). Despite the distance of the trip being given as a factor influencing whether attendees decide to attend or not, Davidson and Cope assert that ‘the speed, ease and cost of accessing the destination are more important than the actual distance between the delegates’ homes and the place where the meeting is to be held (Davidson and Cope, 2003:110). They conclude that, as a result of this, the geographical location of a destination is not so important as an efficient transport infrastructure and that, with regard to international meetings, one vital transport criterion is straightforward access by air. Weber and Chon also argue that ‘... the quality and availability of airline services is critical to the [convention tourism] industry, with the vast majority of international

convention delegates arriving by air' (Weber and Chon, 2002b:176) and Davidson and Cope add to these attributes of availability and quality those of convenience and speed, arguing that delegates are no longer prepared to tolerate long, time-consuming connections at airports (Davidson and Cope, 2003). They point to the importance of major convention centres being located in gateway cities<sup>2</sup> with major national and international airline connections to those areas of the world participants travel from.

The extent to which the above assertions and views are based on research, however, is unclear; although they seem logical, research into the distances delegates are prepared to travel, and how frequently, needs to be undertaken. Yeoman, Robertson, Ali-Knight, Drummond, & McMahon-Beattie indicate that some destinations are more accessible because a wide variety of airlines provide transportation services to that region (Yeoman, et al., 2004). Oppermann and Chon (1997) consider that accessibility is closely related to cost, as the less easily accessible sites tend to be more expensive. One factor to be taken into account when planning a meeting seems therefore to be the consideration of where delegates are likely to be travelling from. Getz points out that organizers of an event often select a site with a central location relative to the market targeted to attend the particular event (Getz, 1997:83). Other associations have a policy of rotating destinations in order that delegates who might need to pay more one year because of the distance to travel, will not have to pay so much the following year because of the destination being closer to home. Both of these seem to be sensible approaches for planners to take, and ones which would probably ensure higher levels of attendance.

Although the above factors have been isolated as a result of research into the factors influencing potential delegates' conference attendance decision-making process, the researcher has been unable to find any research which studies these factors separately. For instance, no research has been found which considers and evaluates the extent to which speed and convenience cancel out the inhibiting factor of distance between attendee's home and the conference location, or the extent to which other factors might mitigate against the negative effects of lengthy airport connection times.

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<sup>2</sup> **Gateway city.** 1. A city that serves as a departure or arrival point for international flights. 2. A city that serves as an airline's entry to or departure point or from a country.

<http://www.hometravelagency.com/dictionary/gateway-city.html>

Crouch and Ritchie in their breakdown of convention site selection factors, include 'barriers' as one of the indicators of accessibility and define barriers as any travel formality, such as visas and customs, which inhibit travel (Crouch and Ritchie, 1998). Again, the writer has been unable to find any research specifically into this area (into, for instance, the extent to which these factors do inhibit travel to a particular conference), although this could possibly be because the conference destinations that tend to be chosen do not present problems in such areas as visa applications. Weber and Chon point to the fact that individuals holding passports from the USA, Canada, Australia, New Zealand, Japan and the European Union are usually exempt from visa requirements if their visit is for less than three months (Weber and Chon (2002b)). However, they do state that this is not a universal exemption and advise that planners need to take into account any fees levied for the issuance of a visa and the time requirements for obtaining a visa; it seems obvious that complications in this area would probably be an inhibiting factor in potential delegates' attendance decision-making process. Kozak also points to the role that government policy can play in encouraging, or not, the development of a tourism industry. Restrictions to entry can be established, he says if tourism is considered to have a negative impact on social and natural structure or, alternatively, restrictions can be reduced, and development encouraged by policies such as that of the Kenyan government who decided to eliminate the visa charge for visitors from some European countries (Kozak, 1999:12).

### **3.3.3.ii Cost**

Although research into the extent of the influence of cost on site selection and conference attendance is limited, it has been shown to play a significant role in both these processes. In the site selection process, meeting planners need to work within the budget parameters set by their association or organisation. The size of the budget will depend on the type of the organisation and the capacity of its members or the potential delegates, to pay, if they are personally required to do so. Rogers for example, distinguishes between surgeons at an annual meeting expecting to stay in minimum three-star accommodation and members of charity organisations possibly needing more modestly priced accommodation (Rogers, 1998, cf. Davidson and Cope 2003).

Cost remains a major factor in the choice of site, however, regardless of how limited or not a budget might be. Of the thirty six attributes governing choice of site identified by Crouch and Ritchie three refer to cost and serve to categorise the areas of cost meeting planners need to consider: the cost of travel/accessibility; the cost of accommodation facilities; and the cost of the meeting facilities (Crouch and Ritchie, 1998). In Crouch and Louvière's study, cost was one of the six most important attributes having a significant effect on choice of site (Crouch and Louvière, 2004).

Cost is also a factor in the conference attendance decision-making process, although it can be complicated by the issue of value for money affected by the attractiveness and attractions offered by the destination; delegates may decide to pay higher costs if they value the extra opportunities offered by that particular destination. Vengesai, looking at leisure tourism, studies the relationship between the competitiveness of a destination and its attractiveness; he proposes that 'The ability of a destination to attract visitors and compete internationally is associated with its reputation and image and is moderated by the perceived cost of the experience' (Vengesai, 2003:644). With regard to conference tourism, Oppermann found that cost – or lack of funding – was the main reason for non-attendance at annual conventions (Oppermann, 1995) and Oppermann and Chon found that if a large percentage of the costs (accommodation, transportation, and registration) are footed by the individual, then their financial situation would influence their decision to attend (Oppermann and Chon, 1997). Their research, however, focuses on domestic meetings rather than international conferences and research into the effects of cost on international conference attendance, as well as the extent to which organisations and institutions cover or supplement costs, is, again, limited. Witt, Sykes and Dartus point out that personal disposable income is not always used to pay for conference attendance costs as in many cases, the companies or academic institutions pay or, if attendees do pay, the amount is tax deductible. They do note, however, that, as the potential participant is required to make a decision within budget constraints, whether these be imposed by their own personal financial situation or by the amount of funding they are given, then the decision-making process remains the same (Witt et al., 1995). Further research into the percentages of delegates being self-funded or funded by their organisations – and the impact of this on the decision-making process is needed.

Cost, however, is not considered in the literature simply as financial cost. In Zhang, Leung and Qu's refined model of the factors that affect convention participation decision-making, one of the subcategories of the 'total cost factors' is 'time cost' (Zhang et al., 2007). Var, Cesario and Mauser point out that not only should living expenses (including hotels, meals, et cetera) and air/ground transportation costs be included in the costs of attending a conference, but so should time (Var et al., 1985). They consider the value of time to be an important cost and see the decision to attend a conference as entailing a consideration of 'trade offs' between the time to be spent at the conference set against time at the office, time with friends, time with family, or at home (Var et al., 1985:198) Oppermann (1995) found that schedule conflicts and overlapping conferences were the second most important reason for non-attendance and Zhang et al point out that attendance at a conference might also result in foregoing other alternative opportunities, another cost factor to take into account (Zhang et al., 2007:1125).

### **3.3.3.iii Safety and Security**

Safety, security, and health issues must inevitably play a role in whether delegates decide to attend a conference at a particular destination and, therefore, whether planners select a particular site there. In Yoo and Chon's study, one of the five main dimensions of convention participation decision-making was found to be the 'Safety and Health Situation' (Yoo and Chon, 2008). According to their research, relevant indicators in this dimension include: i) the safety/security situation at the convention destination; ii) hygiene standards at the convention destination; and iii) my health conditions for travel. The third factor has been discussed above under 'Travelability: Cost' (see 3.3.3.ii).

With regard to the first indicator, possible factors a planner might consider include: the possibility of terrorist attack or political instability which might result in civil disturbances with the potential to harm attendees (Davidson and Rogers, 2006); the existence and thoroughness of security measures at the destination; and whether any health dangers are particularly relevant to the location.

Visitors' safety from petty theft, harassment on the street and violent crime are all important factors in providing a safe conference destination. Conference venues also need

to be designed so that they act in accordance with health and safety issues (for example, by complying with fire regulations and having emergency response plans in place (Krugman and Wright, 2007). As Meyers points out, there is a need on the part of meetings organisers to ensure the safety of attendees by checking on the health, medical and weather conditions of the destination (Meyers, 1999).

No discussion of the second indicator, hygiene standards, is given by Yoo and Chon (2008); presumably, this indicator concerns health and cleanliness standards in food and drink preparation areas, and the overall level of cleanliness of the accommodation and the services provided. Hygiene standards would most probably have an effect on decisions to use the site again, and on the decisions of attendees to return to future conference held there. The third indicator they found, the health of the delegate, basically concerns the extent to which the health of the potential participant has an effect on their decision to attend. Clearly, this is not a factor that can be controlled in any way by the organisers of the conference.

Weber and Chon point to the growing prominence of safety and security issues in the tourist industry and say how consideration of these factors is critical for attracting attendees and assuring safety during an international meeting (Weber and Chon, 2002a:124). Yoo and Chon explain the highlighting of the health and security situation in their study as being possibly due to concerns over health crises and terrorism, pointing to how all sectors in tourism have been affected by recent international disturbances (Yoo and Chon, 2008). The terrorist attacks of 2001 are seen to have had a significant effect on attendees and associations in their planning of meetings (Rogers, 2003:66). Weber and Chon point out that the meetings and conventions industry suffered as a result of the events of September 11, 2001, with national and international meetings being particularly affected simply because of their reliance on air travel (Weber and Chon, 2002a). A more long-term effect of the terrorist attacks, they predicted, would be greater prominence afforded to safety and security measures in the future. However no research has been found that has looked at the extent to which this has been put into practice, or at whether this factor plays a role in the decision-making process of attendees or in the site-selection process of planners. Araña and León in their research into the effects of the terrorist attacks on leisure tourism, indicate that the effects they discuss are temporary and argue that 'more scrutiny should be devoted to the investigation of the long-run effects and to

the process of dynamic adjustments of destination images and tourist choices' (Araña and León, 2008:312); this is also the case for business tourism. The probability is that the effect of events such as the 11<sup>th</sup> September attacks on the *image* of certain countries, including Saudi Arabia, for example, was great; this issue was discussed further under 3.3.1.i (Image) above (see Al-Hamarnah and Steiner, 2004), although, again, no relevant research appears to have been done into the extent to which the image of countries which are international tourist destinations has been changed by certain terrorist events, or the extent to which this shift in image has affected attendees' decisions to attend meetings there and planners' selection of sites there.

### **3.4 Conclusion**

This review was divided into two main parts. The first provided an overview of the literature on the site-selection and attendance-decision-making processes and relevant factors associated with these. The second part provided a more detailed account of the literature into both these areas. The factors that the research to date shows to be most influential in the two processes include the accessibility of the destination, its location, its image, the standard of its venues, issues of safety and security, cost, and the extra-conference opportunities provided at the destination. One interesting new avenue of research was Yoo and Chon's focus on the attitudinal factor, based on this being the most frequently used in describing how a consumer makes a choice (Yoo and Chon, 2008). An additional factor which seems to have great scope for further, more detailed research, is image, particularly destination brand imaging. The research design of this study was informed by the above findings, and grounded in the precedents set in the existing literature, taking into account the gaps in the research and its relevance to the particular contexts being investigated, that is, Saudi Arabia and the UAE.

A number of gaps in the literature were identified. As pointed to previously, the conference industry - particularly the international conference industry - is a relatively young one and therefore the extent of research undertaken into the many different sectors within it, and the multiple factors affecting its development is, as yet, limited. The bulk of previous research studies have focused on national destinations rather than international ones. Most looked at the selection of sites within a country (by planners also based in that

country) or with a focus on one country (for example, Chon's 2006 study of planners choosing destination in Taiwan). One gap in the research was a focus on what priority planners and delegates from different countries would give to the different factors if they were choosing an international destination, or deciding whether to attend conferences at international destinations, or even what other factors might come into play when international destinations were being considered. It seems likely that if the destination at which the conference is held is culturally unfamiliar, factors affecting decisions to attend might differ from those already recognised, or, at least, differ in terms of the priority given to them.

A further gap in the literature was the lack of a focus on the demands, needs and expectations of delegates; despite a shift towards recognition of the importance of satisfying delegates, most research has been carried out into the needs and demands of events planners. With regard to methodology, most research to date has been based on quantitative rather than qualitative methods. Again, particularly with regard to international destinations, more qualitative research would be suitable in initial investigations of factors affecting attendance at international conferences, and evaluation of those conferences, in unfamiliar destinations. This would mean participants would not be restricted to mentioning only those factors laid out in a questionnaire, for example.

The most significant gap in the research, however, from the perspective of the researcher, was that none of it focused on the meetings industry in the Middle East, with its emergent conference destinations, or, more specifically, on the industry in Saudi Arabia or the UAE. Research studies undertaken into each of the themes reviewed in this chapter had limitations because the research had not been carried out in this region and therefore any factors, or subtle differences in these, which were relevant to this context were not brought to light. Having said that, many of the points from the western-based literature have, to a greater or lesser extent, clear relevance for the KSA as a potential international destination and were used to inform the research design of the study.

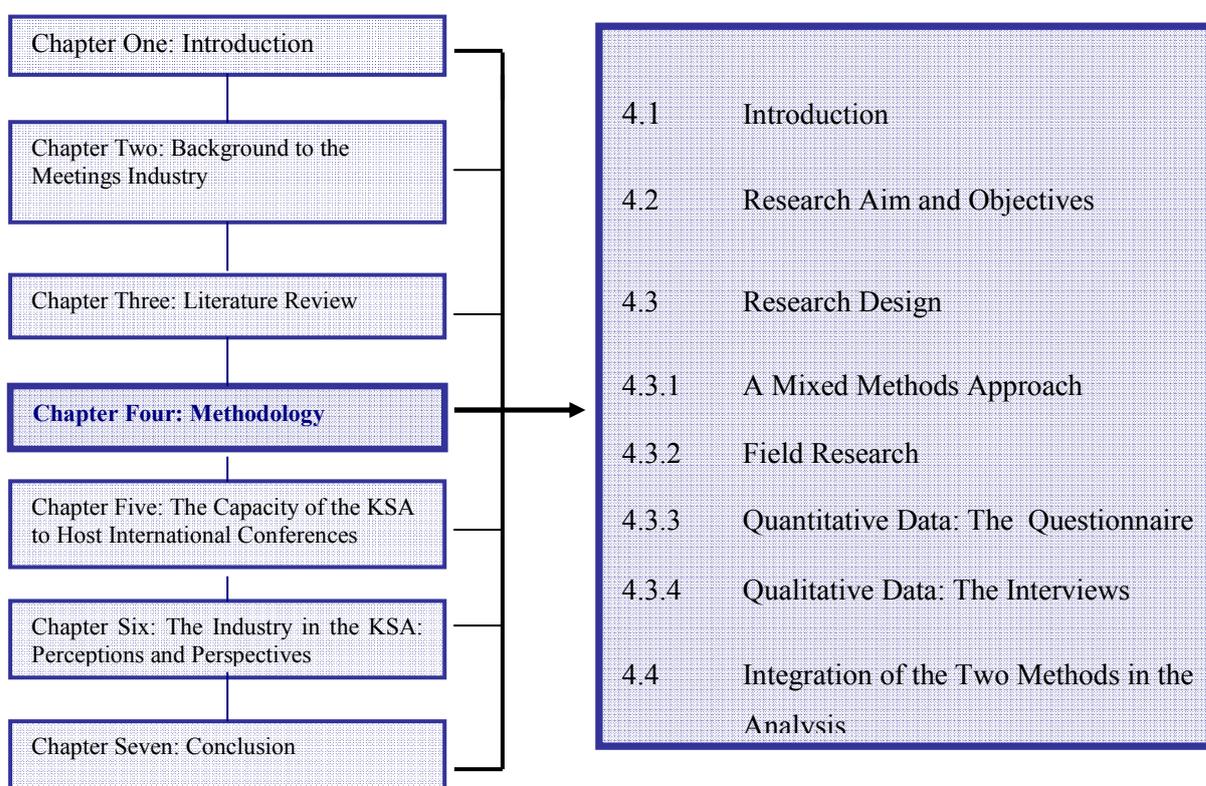
# CHAPTER FOUR

## METHODOLOGY

### 4.1 Introduction

Having provided an overview of the meetings industry both globally, in the Middle East and in the Gulf region, and having reviewed research carried out into the processes off site selection and attendance decision-making, the purpose of this chapter is to describe and assess the research design of the study, focusing on the methods applied by the researcher to achieve her objectives. This chapter prepares the ground for the following three chapters, in which analysis and discussion of the data are carried out. Figure 4.1 below positions the chapter within the thesis and outlines its structure.

Figure 4.1: Outline of Chapter Four



Source: Author, 2010

The chapter begins by detailing the research aim and objectives. It then considers the methods employed to fulfil these objectives and provides a detailed analysis of the field work. This latter section begins with a full description of the four conferences in order to contextualise the environment in which the data collection was carried out. The methods of data collection in the field and analysis of the data is then divided into two sections. The first deals with the quantitative data and is presented in six sub-sections: a justification of the use of questionnaires; the design of the questionnaire; the pilot study; the sample groups; the methods of analysis; and, finally, data collection difficulties. The second section is concerned with the qualitative data collection and analysis and is divided into four main areas: a justification of the use of interviews; a description of the design of the interviews and their organisation; a description of the sample groups; and, finally, an account of how the data were analysed. Pulling together these two sections is a report of how the two fieldwork methods were integrated in the final analysis. The chapter ends with a consideration of the quality of the data and a discussion of the extent to which it met the aims of the research study.

## **4.2 Research Aim and Objectives**

As discussed in chapters 1 and 2, Saudi Arabia is working to develop alternative sources of revenue to oil and the international conference tourism industry is one potential source that is under review for development. There has, however, been a dearth of research into the potential for this industry to be successful in the Kingdom and this study aims to address this lack. In order to gain an understanding of the factors which support or hinder the development of the industry generally, a review and analysis of the literature and research relevant to the conference tourism industry, and its development in the global and regional contexts, was carried out (see chapters 2 and 3). The aim of this research is to assess the KSA's potential to become an international conference destination through an exploration of how the factors connected to the successful development of this industry might be affected by socio-cultural and political features of Saudi Arabia which are relevant only to that context, and whether, on a practical level, it has the resources and capacity necessary to host international conferences, or at least the potential to develop these.

Research was also carried out into the UAE (a Gulf country which has successfully established itself as an international conference destination) as a way to shed light on factors relevant to the above two objectives. The UAE and the KSA to a large extent share many characteristics: they have similar cultures, religions, climates, are in similar locations, and are both wealthy countries targeted for foreign investment. The researcher felt that gaining insights into the situation in a country that had recently established the industry would shed light on the factors that had helped them succeed that might also be relevant to the KSA - and on the factors that might act as a hindrance to the development in the Kingdom. Similarly, it might also bring to light factors that the KSA might be in possession of that were particular to it and that might therefore add to (or detract from) its potential to succeed. The data from the UAE were therefore used as a benchmark against which to assess the KSA's potential; factors illuminated by exploring the two sets of data side by side might not have been so easily distinguishable if only Saudi Arabia had been studied.

The aim of this study was, therefore, to assess the potential for Saudi Arabia to become an international conference destination. This assessment was based on a focus on the three objectives and associated research questions presented in chapter one (see 1.3) and outlined below in Table 4.3.1.

### **4.3 Research Design**

In order to achieve the objectives, two different methods were used. With regard to the data collected from delegates, both qualitative (through interviews) and quantitative (through a questionnaire) methods were used. Because the success of a destination depends to a large extent on how *delegates* perceive it (see Severt et al., 2007, for example), the bulk of this research focuses on their views, perspectives and experiences of conferences in Saudi Arabia and the UAE. Generally, as was pointed out in chapter three, much research in this field has focused on the perspectives of event planners with regard to site selection, top convention destination locations, and image of destination city; this has meant that research into the factors motivating attendees to, or deterring them from, attending a meeting is underdeveloped (Severt et al., 2007, Zhang et al., 2007). The researcher believed that it was essential to gain information from delegates for

two reasons: firstly, in order to gain firsthand and direct views of the conference experience they had had and the factors they perceived as impacting on the success or otherwise of conferences; and secondly, because the success of a destination relies to a great extent on how delegates perceive it.

The views and objectives of the officials engaged in the industry were explored through interviews. Data gained from interviews with officials provided a broader focus than that of delegates; the focus extended outside the parameters of the four conferences in the study and was more factually based in actual knowledge and experience of what affects the organisation and success of conferences, both positively and negatively. The methods used to achieve the objectives of the research study were therefore a mixture of both qualitative and quantitative ones. The following section details the reasoning behind the decision to use a mixed methods approach to data collection and analysis.

### **4.3.1 A Mixed Methods Approach**

An overview of the different methods used to achieve the objectives in the study is given in table 4.1 below.

This research study employed both qualitative and quantitative methods to gather and analyze the data necessary to meet the aims. The primary sources of data were delegates and officials in the field whose views and knowledge were obtained through the use of both questionnaires and interviews. The use of at least two distinct approaches, as in this study, is considered by some to be a third approach in its own right, namely a mixed methods approach. This approach is defined by Cresswell (2008: 217) as:

‘... research in which the inquirer or investigator collects and analyzes data, integrates the findings, and draws inferences using both qualitative and quantitative approaches or methods in a single study or a program of study.’

Table 4.1: The Mix of Methods used to Achieve the Study Objectives

<b><u>Research aim</u></b>		
<b>To assess the potential for Saudi Arabia to become an international conference destination.</b>		
<b><u>Research Objectives</u></b>	<b>Questionnaire</b>	<b>Semi-structured Interviews</b>
This assessment was carried out through a focus on the following three objectives and associated research questions:		
To assess the capacity of Saudi Arabia to host international conferences		
1.i What is perceived as being positive / negative about current provision of international conferences in the KSA?	<b>X</b>	x
1.ii How is the capacity of the KSA to be an international conference destination perceived?	<b>X</b>	x
2. To explore the social and political feasibility of the Kingdom of Saudi Arabia developing as an international conference destination		
2.i. What socio-political factors come to light in the views and information gained from officials in the KSA?	-	<b>X</b>
2.ii. What socio-political factors arise in the views and perceptions of international delegates at conferences in the KSA?	x	<b>X</b>
3. To use the data gained on the United Arab Emirates as an established international conference destination in order to illuminate the factors that support and inhibit the potential of the Kingdom of Saudi Arabia to be an international conference destination		
3.i What is perceived as being positive / negative about current provision of conferences in the UAE?	<b>X</b>	x
3.ii How is the capacity of the UAE to be an international conference destination perceived?	<b>X</b>	x
3.iii What socio-political factors come to light in the data gained from officials in the UAE?	-	<b>X</b>
3.iv What socio-political factors arise in the views and perceptions of international delegates at conferences in the UAE	x	<b>X</b>

(**X** = data **mainly** acquired through this method and **partly** through the **X** method for this research question)

This is quite a straightforward definition of an approach which calls into question a number of methodological and philosophical issues, relevant ones of which will be considered below. According to Johnson and Onwuegbuzie (2004) there are two major types of mixed-method research on which designs can be based: mixed-model and mixed-method. The mixed-model type is based on mixing qualitative and quantitative

approaches within the different stages of the process or across all the stages. The mixed-method type, however, uses the qualitative approach in one phase and the quantitative approach in another distinct phase; it amounts to conducting, within one research study, a quantitative study and a qualitative study. Despite there being one instance in this research study of the mixed-model type (when a qualitative, open-ended question is asked in the (quantitative) questionnaire), the research design is based on the mixed-method type. In order to construct this design, decisions over i) whether to operate mainly within one particular paradigm (for example, with quantitative data being given higher priority than the qualitative data) and ii) whether the phases are to be conducted concurrently or sequentially, need to be made (Johnson and Onwuegbuzie, 2004:19; Brannen, 2005:14). Figure 4.2 below illustrates possible mixed-method designs based on these two decisions, although Johnson and Onwuegbuzie do point out that it is essential to recognize that there are many more possible (and more complex) permutations, all of which should be based on how effectively they are likely to answer the research questions. However what Johnson and Onwuegbuzie see as essential in a mixed methods approach is that the findings are mixed or integrated at some point; when different methods are carried out concurrently, as in this research study, this would be at the stage of discussion and interpretation of the findings. They see the potential for a range of different research designs as being a major advantage of mixed method research designs, pointing out that it contrasts not only with researchers having to choose from a list of possible methods within traditional quantitative research, but also with them having to make the stark choice between the qualitative and quantitative approaches, and arguing that the mixed approach allows the researcher to be creative and responsive to the demands of the study and the information it unearths. Brannen (2005:8) argues that, if research paradigms are 'all important' in shaping the choice of methods, then this prevents the researcher from choosing methods that are most appropriate to the unfolding context as the research proceeds.

Figure 4.2: Mixed Method Design Matrix

		Time Order Decision	
		Concurrent	Sequential
Paradigm Emphasis Decision	Equal Status	QUAL + QUAN	QUAL → QUAN QUAN → QUAL
	Dominant Status	QUAL + quan QUAN + qual	QUAL → quan qual → QUAN QUAN → qual quan → QUAL

*Note.* “qual” stands for qualitative, “quan” stands for quantitative, “+” stands for concurrent, “→” stands for sequential, capital letters denote high priority or weight, and lower case letters denote lower priority or weight.<sup>11</sup>

Source: Johnson and Onwuegbuzie (2004: 22)

The figure shows possible mixed method research designs, according to decisions made regarding time ordering of when the different approaches are used, and what paradigmatic emphasis is to be placed on the overall study. For example, the **QUAL → QUAN** design gives equal status to the data collected using a qualitative method and those collected using a quantitative method. It also indicates that the qualitative data were collected *before* the quantitative data and were used to inform methods for the quantitative data collection or analysis in some way(s). In the case of the research design of this study, equal status was given to both the data collected through the questionnaire and the data collected through the interviews (reasons for which will be discussed below). The data were also collected concurrently, with neither one of the sets of findings being used to inform the method, or general approach, chosen for the other. The design therefore matches the **QUAL + QUAN** one in Figure 4.2. The mixing of the methods in this study therefore becomes apparent during the final data interpretation stage when the findings from both sets of data are integrated.

There are many debates over, and criticisms of, the mixing of approaches which are based on philosophical stances with different principles (these being seen as paradigms when they are seen to be competing) (Brannen, 2005). Brannen points out that it can be

philosophical assumptions and principles that drive a researcher's choice of methods and 'frame the researcher's frame of reference' (Brannen, 2005). In this case, it seems difficult to reconcile the use of the two paradigms if they are diametrically opposed in their view of what constitutes reality. Table 4.2 below gives an overview of the main assumptions held by quantitative purists (associated with the *positivist* philosophy) and qualitative purists (associated with an *interpretivist or constructivist* philosophy).

Table 4.2: Contrasting Paradigms

QUANTITATIVE RESEARCHERS' ASSUMPTIONS BASED ON THE POSITIVIST PARADIGM	QUALITATIVE RESEARCHERS' ASSUMPTIONS BASED ON THE CONSTRUCTIVIST / INTERPRETIVIST PARADIGM
<ul style="list-style-type: none"> <li>• Social observations should be treated as entities in much the same way that physical scientists treat physical phenomena</li> <li>• The observer is separate from the entities that are subject to observation</li> <li>• Social science inquiry should be objective:               <ul style="list-style-type: none"> <li>i) time- and context-free generalizations are desirable and possible;</li> <li>ii) real causes of social scientific outcomes can be determined reliably and validly</li> </ul> </li> <li>• Biases should be eliminated:               <ul style="list-style-type: none"> <li>i) maintain emotional detachment from the objects of study</li> <li>ii) avoid involvement with the objects of study</li> </ul> </li> <li>• Use a formal writing style to indicate neutrality</li> </ul>	<ul style="list-style-type: none"> <li>• Multiple-constructed realities abound</li> <li>• Knower and known cannot be separated because the subjective knower is the only source of reality</li> <li>• Time- and context-free generalizations are neither desirable nor possible</li> <li>• It is impossible to differentiate fully causes and effects</li> <li>• Research is value-bound</li> <li>• Logic flows from specific to general (e.g., explanations are generated inductively from the data)</li> <li>• A more direct, 'rich' and informal writing style</li> </ul>

Source: Adapted from Johnson and Turner (2003: 14)

According to Brannen (2005:7)

'Quantitative researchers have seen qualitative researchers as too context specific, their samples as unrepresentative and their claims about their work as unwarranted – that is judged from the vantage point of statistical generalisation. For their part, qualitative researchers view quantitative research as overly simplistic, decontextualized, reductionist in terms of its generalisations, and

failing to capture the meanings that actors attach to their lives and circumstances.’  
(Brannen, 2005:7)

Although the bases of both the approaches outlined in Table 4.2 above can be seen to be fundamentally different, it does not necessarily need to be philosophical assumptions about ‘ideas and their origins’ (Brannen, 2005:10) which drive a research design. Johnson and Onwuegbuzie argue that, with mixed methods research, the objective is not to replace either of them, but ‘rather to draw from the strengths and minimize the weaknesses of both ...’; at the same time, they recognize that ‘some philosophical differences may lead to important practical consequences while many others may not’(Johnson and Onwuegbuzie, 2003:14). Brannen points out that the issues around paradigms and associated methods are far more complex than they might initially appear and that ‘[w]hile the key research question or questions in a piece of research may be underpinned by realist assumptions, some research questions may be underpinned by interpretivist assumptions’(Brannen, 2005: 8). Brannen argues, for instance, that surveys do not necessarily need to be based on or conducted according to positivist assumptions and points to Bryman’s discussion of how participant observation (usually associated with the interpretivist tradition) can be carried out from a realist perspective (Bryman, 1984:89 cf. Brannen, 2005 ).

Johnson and Onwuegbuzie’s response to the debate over methods and paradigms is to say that, from a philosophical stance, it is a ‘third research movement ... that moves past the paradigm wars by offering a logical and practical alternative’ (Johnson and Onwuegbuzie, 2004:17). They argue that the approach uses the logic of inquiry of induction (looking to discover patterns in data), deduction (looking to test hypotheses and theories) and abduction (looking to distinguish between possible sets of explanations for understanding one’s data and deciding on one which best explains it). The mixed methods approach is seen by them as firstly, as a more pragmatic approach to research and choice of methods, which neither restricts nor constrains the researcher; secondly, as a ‘creative’ and ‘expansive’ form of research; and thirdly as ‘inclusive, pluralistic and complementary’. They stress, however, that the most important consideration when constructing a research design is the research questions and how the methods that are decided upon are the ones perceived to have the best chance of ‘... obtain[ing] useful answers’ (Johnson and Onwuegbuzie, 2004:18). Brannen’s discussion of the pragmatist, as opposed to the

paradigmatic, approach to research considers how the paradigmatic approach is based on an interest in ‘... ideas and their origins’, whereas a pragmatic approach is ‘less purist in terms of methods and preconceptions (about theory and methods)’ and more oriented to ‘open[ing] up the world to social enquiry’ (Brannen, 2005:10). Relevant to this research study is the description of pragmatist researchers as being open to responding to research practicalities and questions with the use of an appropriate mix of methods (not just, presumably, regardless of whether they come from the same philosophical principles, but possibly *because* they do and because they offer distinct advantages). Brannen cites Hammersley as describing such researchers as being ‘oriented to the production of research results that they seek to link to practical and policy ends’ (Hammersley, 2000, cf. Brannen 2005: 10).

The use of a mix of methods to explore the potential for Saudi Arabia to develop as an international conference destination has its rationale in the usefulness of this approach in the final, interpretation, stage of research. Although many perceive a major benefit of using mixed methods as being the opportunity to corroborate one set of findings with another, and therefore to validate the findings, this has led to one of the main criticisms of using methods based on different philosophical principles: that, at the data analysis and interpretation stage, the findings gained from the different methods are not comparable, based as they are on two different sets of philosophical principles regarding knowledge. This criticism seems to be mainly valid when it is directed at the use of triangulation. Initially, triangulation was seen as a way of strengthening the credibility of research findings or maximizing the measurement of validity of a particular unit of study by comparing the findings obtained using different methods (Rothbauer, 2008). This research study, however, does not make use of the (qualitative) interviews and the (quantitative) questionnaire in order to gather data which can be used to corroborate, confirm or cross-validate findings (Creswell, 2003:217). Rather, the purpose of using these two methods accords more closely with two of Greene, Caracelli and Graham’s five broad rationales of mixed methodology studies, these two being:

1. for the purpose of ‘complementarity’, that is, ‘seeking elaboration, enhancement, illustration, clarification of the results from one method with the results from the other method’; and

2. for the purpose of ‘expansion’, that is, ‘seeking to expand the breadth and range of inquiry by using different methods for differing components’.

(Greene et al., 1989)

Johnson, Onwuegbuzie and Turner build on this understanding of the purposes (referring also to work done by Sieber (1973) and Rossman and Wilson (1985) by looking at how the use of mixed methods brings ‘breadth’ to the findings by: providing a better understanding of what is being studied; providing a fuller picture and a deeper understanding of that area; enhancing description and understanding of the data gathered; and providing richer, more useful and more meaningful answers to the research questions (Johnson et al., 2007: 115). This position again leads to a criticism of the use of mixed methods, namely that findings based on data collection methods and data analysis methods that differ cannot be used to build up a picture of complementarity or enhancement as they are based on different priorities (one to gain numbers, for example, one to gain views) and obtained from different people in different settings with different amounts of time, for example, available to consider the questions). However, when considering the complexity of the question of how different sets of data can be used, one argument against dismissing the value of a mixed methods approach is that these different strategies ‘... offer evidence to inform judgements, not techniques that provide guaranteed truth or completeness’ (Hammersley, 2005:12). This removes to some extent the block created by an assumption that there is one truth that is being sought and that findings gathered from two different methods will more clearly illuminate that truth, although it still does leave open to question *how* findings can be integrated. There is also disagreement over the question of how one philosophical stance necessarily requires particular research techniques and methods; Halfpenny challenges this assumption by asserting that when devising research questions, constructing a research design and analyzing data, there are a number of logics that inform the process and these do not necessarily all stem from the same philosophical stance (Halfpenny, 2005).

The use of the mixture of methods in this research study was relevant to the aims. The rationale for each method (showing what it offers the study, as well as considering its drawbacks and possibly how these are addressed by the other method) is given in the relevant sections below (see 4.3.3.i and 4.3.4.i). However, it is important here to spend some time considering what each method contributed to the study that the other could not

and this is seen most clearly in relation to the two main objectives of the study (that is, the first and second objectives). In collecting data relevant to the first objective, concerned to assess the capacity of the KSA to host international conferences, a questionnaire was seen as being the most appropriate research tool. The questionnaire allowed for data on a broad range of practical factors (and views and perspectives of these) to be collected in a way that provided an indication of the main trends and tendencies. With the exception of a few factors (those of gender segregation and ease of visa applications), each of them was considered to be broadly applicable to any emerging destination: infrastructure, safety, the quality of facilities, entertainment, image, and organisation. They were chosen from the perspective of what the researcher believed to be important, based on her reading of previous research and general literature on the industry. The researcher was not concerned at this stage of the research to uncover new factors that might be relevant or to probe into the reasons behind respondents' attitudes and perspectives, but simply to gain a spontaneous response regarding the value of a range of factors, which would inform her judgment of what the general trends and tendencies were with regard to capacity. The functions of a questionnaire – to collect factual information, and to look at basic attitudes and opinions – were seen as being appropriate for this aim. Interviews would not have enabled the researcher to gather information on such a range of factors from such a large number of participants.

Questionnaires are not generally considered to be appropriate for exploring complex issues in great depth or for exploring new or difficult or potentially controversial issues. With regard to the second objective, concerned to explore the socio-political feasibility of the KSA becoming an international conference destination, the picture becomes more complex and there was a need for more in-depth input from participants. The focus changes from practical factors to more abstract ones. Because the KSA is an emerging destination, because there had been no previous research conducted into this industry – or indeed into the impact of the socio-political situation on any sphere of activity in the kingdom - and because the Kingdom is markedly different in many respects from other parts of the world, a research tool was needed that would elicit as much information as possible without constraining the respondent within the bounds of specific questions. Unlike the questionnaire tool, where the type of information elicited is controlled by the researcher, the interview allows the respondent the space and freedom to provide information they deem important or pertinent, regardless of what the interviewer may

think. Although results from the questionnaire data clearly indicated an interest on the part of the delegates in the culture of the country, it was only in the interviews that the strength of this interest, and the dissatisfaction regarding limited access to the culture, became apparent. Similarly, although the author was somewhat aware of the complexity of bureaucratic procedures generally in the kingdom, it was only through interviews with officials that the actual procedures were described – and the negative impact they had on the organisation of conferences clarified. Such information would have been very difficult to elicit in a structured questionnaire. Indeed, any questions designed explicitly to gather data on the knowledge, understanding and opinions of participants with regard to such aspects of the socio-political situation in Saudi Arabia would have been difficult to respond to; as suggested by the wording of the second objective and its associated research questions, the aim was to ask questions about a range of issues and to see what came ‘to light’ or what information might ‘arise’ in the course of the conversation. The interviews therefore enabled the researcher to stand back and see what came up and to see in what ways this information might illuminate aspects of the socio-political situation that may impact on the development of the industry. This would not have been possible through a questionnaire.

As mentioned at the beginning of this section, a more theoretical and detailed justification for using a questionnaire in this study is given in section 4.3.3.i below. Similarly, a focus on why interviews were used in this research – and what the advantages of drawbacks of this research tool are – is given in section 4.3.4.i below. The mixing of the two methods in this study undoubtedly added to the breadth and depth of information the researcher was able to gather from all research participants.

### **4.3.2 Field Research**

In order to fully contextualise the situation in which the field research was carried out, this section will provide an overview of the four conferences at which the data were collected and a justification of why they were chosen. The two conferences in the KSA included the Gulf Investment and Tourism Forum (henceforth GITOF) and the JEF (henceforth JEF), both of which were held in Jeddah in February, 2008, with the former concentrating on tourism and the latter on the creation of economic partnerships. The two

conferences in the UAE included the Gulf Meetings and Events Conference (henceforth, GMEC), held in Dubai, and the Gulf Incentive Business Travel & Meetings Exhibition (henceforth GIBTM), held in Abu Dhabi, both of which took place in April 2008 and both of which were concerned with the meetings industry. All four conferences were of between two and three days long and included talks, workshops, and an exhibition. The following justification of the choice of the four conferences will consider the selection of the two conferences in Saudi Arabia first and then turn to a justification of the two conferences in the UAE.

The JEF was chosen because it is the most established international conference held in Saudi Arabia, having run for nine consecutive years, and has extensive experience of organising international speakers and hosting international delegates. It was therefore considered that the data gathered from delegates on this conference would provide a clear picture of the strengths and weaknesses of international conference provision in the KSA; any weaknesses focused on in the provision of this conference were likely to be representative of weaknesses of conference provision in the kingdom in general, and the strengths were likely to represent what the KSA is currently capable of. The research was aimed at gaining the views and attitudes of international delegates of conferences in the KSA and, as a large international conference, it was guaranteed that there would be a substantial number of international delegates from outside the Gulf attending it who might be prepared to participate in the study.

Due to reasons of time, and because the researcher needed to travel to collect the data, it was necessary to choose another international conference which was held in the same period as the JEF. The GITOF conference was chosen because it would be attended by international delegates. The researcher considered that data gathered on this conference would contrast with that gathered on the JEF because the conference was not so well established (having run for only 3 years at the time of the study) and the organisers did not therefore have so much experience with international events. This conference was therefore more likely to be representative of standard conferences held in the KSA.

Gathering data from two conferences enabled the researcher to gain a fuller picture of the provision of international conferences in Saudi Arabia than would have been possible if only one conference had been focused on. The views of international delegates on the provision of conferences in Saudi Arabia, which would contribute to the image being formed of the country as a potential international conference destination, would not only be those on a more well-established and well-organised conference, but also those on a conference more likely to show a greater range of weaknesses.

A further reason for choosing these two conferences was that it would be easier in Jeddah to gain access to male delegates. Had a conference been chosen in the more conservative Riyadh, for example, there would have been greater constraints placed on the researcher's access to male delegates, which would have severely limited the number of participants in the study. Having said that, a limitation in the choice of conferences, and therefore in the research, is that only views and information on conferences in one part of the country, Jeddah, were chosen, which might therefore not have been representative of views on conferences held in other parts of the country where there can possibly be greater constraints placed on certain aspects of conference provision such as stricter segregation rules, more guarded attitudes to international visitors, and possibly more restrictions placed on entertainment outside the conference centre. Data gathered from delegates at conferences in other parts of the country may therefore have indicated different views, perspectives and attitudes than those gathered from delegates to conferences in Jeddah.

Unlike in the KSA, the UAE permits outside organisers and hosts to hold conferences there. The two conferences in the UAE (GIBTM and GMEC) were chosen for a number of reasons. Firstly, they were organised and hosted by internationally respected organisations (Meetings Professionals International and Reed Exhibitions) and could be expected therefore to be of an internationally high standard and likely to exploit all facilities and services provided in the UAE. The fact that these two organisations had chosen the UAE is also an indication of that country's standing as an international conference destination. Because the theme of the conferences was the meetings industry (both internationally and in the Gulf), it was anticipated that participant responses would be based on a greater understanding and awareness of the industry and the factors that

lead to the successful establishment of a country and a venue as an international destination. It was expected, as a result of the above, that informed and focused responses would prove useful for creating quality benchmarks against which to measure Saudi Arabia's development, this being the main reason for including conferences in the UAE in the research study. Because of the international nature of these conferences, it was also expected that there would be a large number of international delegates from which the sample group could be taken. A final, very practical, consideration when selecting these two conferences was the convenience of the dates on which they were held; because they were close together, this enabled the researcher to collect data within a fixed time period rather than needing to make separate visits to the UAE from her base in Great Britain or in Saudi Arabia.

Having provided a general overview of the four conferences in the above justification, the focus now turns to providing a more detailed description of them, which is outlined in Table 4.3 below.

As far as the two conferences in the KSA are concerned, an important factor to note is that the closed nature of the system in KSA (see chapter one) requires that there is absolute control by the organisers over every aspect of the conference, from the speakers and delegates invited, to the themes that are selected, a factor which is, in itself, of great significance. A further very important characteristic of conferences in Saudi Arabia which needs emphasising is the fact that, due to the laws on gender segregation, they are organised differently to those in the UAE (and the rest of the world). This aspect is discussed below but it is important to emphasise that gender segregation at conferences is unique to the KSA and this may have an influence on the responses of delegates in the KSA to questionnaire and interview questions.

Table 4.3: The Four Conferences

	KSA Conferences		UAE Conferences	
	Gulf Investment & Tourism Forum GITOF	Jeddah Economic Forum JEF	Gulf Meetings and Events Conference GMEC	Gulf Incentive Business Travel & Meetings Exhibition GIBTM
<b>Date</b>	16-18 Feb 2008	23-25 February 2008	5-6 April 2008	8-10 April 2008
<b>Place</b>	Jeddah	Jeddah	Dubai	Abu Dhabi
<b>The Organizers</b>	The Prince Sultan College of Tourism and Management and the Jeddah Chamber of Commerce and Industry	<u>Jeddah Marketing Board</u> , which is a part of the <u>Jeddah Chamber of Commerce &amp; Industry</u> and in association with <u>Duke Corporate Education</u>	Meeting Professionals International	Reed Travel Exhibitions
<b>Theme</b>	Round the year tourism & investment	Value Creation Through Alliances and Partnerships	Current topics and issues affecting the meetings and events industry today	Business Travel and Meetings in the Gulf
<b>Format</b>	Talks and Exhibition	Talks and Exhibition	Talks and Exhibition	Educational Seminars and Exhibition
<b>The Speakers</b>	From the Gulf-Middle East region / the West	Economists, leading business people, entrepreneurs and academics from Gulf-Middle East region / the West	Meetings professionals from the UAE & the West	Meetings professionals from the UAE & the West
<b>The Delegates</b>	Unknown number of participants	Estimated 2500 visitors	175 visitors	1500 visitors
<b>Venue</b>	Hilton (Hotel) Convention Centre	Jeddah International Exhibition and Convention Centre	InterContinental Hotel Dubai Festival City	Abu Dhabi National Exhibition Company Centre (ADNEC)
<b>Languages</b>	English & Arabic	English & Arabic	English	English

Source: Author, 2009

Segregation of men and women, due to laws based on religious and cultural observances, is mandatory in the KSA. At both conferences in this study, men and women were segregated. The delegates sat in one large hall to hear the presentations (delivered by speakers on a stage at the front of the hall) but men and women were divided by a transparent barrier. In Jeddah, unlike in Riyadh, women, particularly international female visitors, have more flexibility in that they are permitted to sit on the men's side if they

wish; men, on the other hand, are not permitted to sit on the women's side. Similarly, the dining area consists of two halls – one for the women and one for the men – and women can join the men but not vice versa. However, men serve the food in both halls. Female toilets are located next to the part of the presentation hall where the women sit and men's toilets are similarly located next to their part of the hall. The entrance hall to the conference centre, or hotel, is the only place where segregation is not enforced.

It must be pointed out, however, that the two conferences on which this research is based took place in Jeddah, which tends to have a more liberal attitude towards segregation than other parts of the KSA. Conferences that take place in Riyadh, for example, would adopt a far stricter stance and insist on absolute segregation. A conference centre in Riyadh, for example, is organised over two floors, one of which is for the use of women and one for the use of men. Women view conference proceedings and presentations via video link and can participate only through a microphone. Men are in the main hall and have direct access to the conference speakers. Women are not permitted to join the men's areas at any time. Having said that, the fact that the genders were segregated at the two conferences in Saudi Arabia did impact on both the quantitative and qualitative data collection; this impact will be discussed in more detail, when relevant, in the parts of the chapter below dealing with data collection.

At both conferences in the KSA, the speakers were both Arabic and Western. A mixture of Arabic and English was used (and translation aids were used) at the GITOF and at the JEF, occasional talks were delivered in Arabic (and translation aids were mainly used for Arab delegates for those talks presented in English). With regard to the organisation of the two conferences, both the logistical organisation (for example, catering, facilities, seating, and so on) and the content organisation (for example, the programme, the choice of themes, the selection of speakers, and so on) was carried out by the Jeddah Chamber of Commerce and Industry.

With regard to the Gulf Investment & Tourism Forum (GITOF), this is organised by the Gulf Tourism Committee of the Federation of GCC Chambers of Commerce, in cooperation with the Jeddah Chamber of Commerce and Industry and the Prince Sultan College of Tourism and Management. Participants included those Ministers responsible for investment, tourism and development and those officials in the different tourism sectors throughout the Gulf countries. Representatives of Arab Chambers of Commerce

attend as well as those from joint Arab-foreign chambers. Research at this event was carried out over the three days, 16<sup>th</sup> to 18<sup>th</sup> February, 2008. The papers were presented over two days (the 17<sup>th</sup> and 18<sup>th</sup> of February, with the 16<sup>th</sup> being spent on registrations and the Gala Opening). The majority of the speakers were from Gulf countries and, from outside the Gulf, there was one speaker from Australia, one from South Africa and one from Spain. The event was held at the Hilton hotel's convention centre, which was where the JEF used to be held before the convention centre was developed.

The second conference studied in the KSA was the JEF, which has been held annually for nine years (although it was cancelled this year, 2009, due to not having received government 'permission' (Ramkumar and Fareed, 2009). The aims of the Forum are:

'To examine, formally at the annual Jeddah Economic Forum and informally at other complementary events, the key issues, both short and long-term, which most effect the ability of the Middle East in general and the Kingdom of Saudi Arabia in particular to enjoy sustained economic growth generating new work opportunities and a stable business environment. To identify and prioritize the actions necessary to achieve these goals and to publish an annual report on the results of these discussions within three months of the Jeddah Economic Forum.'  
(JEF, 2010)

This research study is partly based on interviews with delegates, and questionnaires completed by delegates, at the 2008 Forum, which was held over three days in February, from the 26<sup>th</sup> to 28<sup>th</sup>. The focus of this Forum was on the theme of value creation through alliances and partnerships and Prince Khalid urged foreign businessmen to look at the kingdom and specifically at the Red Sea port city as a business and cultural centre which was keen to attract commerce and investment. More than 24 economists, leading businesspeople, entrepreneurs, and academics from around the world were scheduled to address the four-day forum. Some of the influential business leaders taking part in the forum included Nobel Prize winner and founder of the Grameen Bank, Muhammed Yunus, the chairman of the Virgin Group, Richard Branson, Palestinian Prime Minister, Salam Fayyad, and, via video linkup, the UK's Prince Charles. Key sessions at the forum were moderated by British broadcaster, Alastair Stewart, and CNN's John Deferios. The list of influential speakers reflects the growing prestige of this event. The event was held at the Jeddah Exhibition Centre, which was used for the first time for this event and

refurbished specifically to accommodate it. Whereas previously, at the Hilton Hotel Complex in Jeddah, which was used to host the Forum, there had been numerous and frequent security checks, the move to this venue meant there was only one security screen at the entrance. The Centre had 40,000m<sup>2</sup> of total area with 10,000m<sup>2</sup> of air conditioned exhibition space and a Conference hall.

With regard to the two conferences in the UAE, these were hosted by the Meetings Professionals International (MPI) and by the Gulf Incentives, Business Travel, and Meetings Exhibition (GIBTM), both organisations having global experience of organising meetings and exhibitions. Similarly to the conferences in the KSA, the speakers were of mixed nationalities and one conference (GMEC) was held in a hotel's convention centre, and the other (GIBTM) in a custom-built convention centre. However, the language used throughout both meetings in the UAE was English.

The Gulf Meetings and Events Conference (GMEC), is held yearly in Dubai and is one of the major conferences hosted by MPI in the Gulf. It was held for the first time in 2008 and runs in conjunction with GIBTM in Abu Dhabi (see below). Both events focus on delivering a programme of education, professional development, new business opportunities and networking to the region. GMEC aims in part to bring together professionals in the meetings industry from around the world, to act as a source of business-to-business opportunities, networking opportunities, and educational opportunities focused on attracting international business and developing international standards. The Conference in 2008, at which this research was carried out, was the first one and was held over two days, from 5 – 6 April. It was held at the Intercontinental Hotel Dubai Festival City and hosted 175 delegates from 19 countries.

The other conference in the UAE was the Gulf Incentive Business Travel & Meetings Exhibition (GIBTM), an international event in the Gulf region dedicated entirely to MICE, and specifically to the industry in the Gulf and the Middle East. This exhibition brings together buyers and suppliers and participants who range from meetings planners to professional organisers, to in-house travel managers. The aims of the event are to deliver business-to-business opportunities, networking opportunities and a professional education programme examining industry trend reports. With regard to the latter, the complementary professional education programme runs seminars presented by

international industry experts on a range of topics from the meetings industry, global and regional trends and best practice.

The conference is held at the Abu Dhabi National Exhibition Centre (ADNEC), which has 12 exhibition halls providing 55,000 square metres of inter-connected area and a visitor concourse measuring 18,000 square metres. It is the largest exhibition venue in the Middle East and provides for large scale public shows and international trade exhibitions. The space is fully air-conditioned with integrated I.T. facilities. The event has been running, annually, since 2007; the research carried out at this event was carried out at the second exhibition, held in 2008, from 8 – 10 April.

### **4.3.3 Quantitative Data: The Questionnaire**

This section is divided into six parts, each of which deals with a different aspect of the quantitative data. The first part provides a justification for the use of a questionnaire, and is followed by a description of the design of the questionnaire. The third part gives details of the pilot study and the fourth describes the sample groups. The fifth and sixth sections focus on data collection difficulties and analysis of the quantitative data respectively.

#### **4.3.3.i Justification for Using a Questionnaire**

Clearly one of the main reasons for undertaking quantitative research is a desire to be able to measure something. Bryman and Bell point out that measurement allows a researcher to make fine distinctions between people's attitudes or the factors affecting them and to make more precise estimates of the degree of the relationship between concepts (Bryman and Bell, 2007:158). With regard to the former, the questionnaire enabled the researcher in this study to make distinctions between the indicators of satisfaction or dissatisfaction with the conference provision and the wider experience of visiting Saudi Arabia and the UAE; for example, to measure the importance of their attitude towards safety at the venue, or the influence of heritage on their decision to attend, or their attitudes towards returning. As far as making more precise estimates of the relationships between factors is concerned, the questionnaire enabled analysis, for example, of the proportion of female

and male delegates who found gender segregation to be a negative influence on their desire to attend conferences in the KSA.

Another reason for undertaking quantitative research, as discussed by Bryman and Bell is 'generalization', the ability to generalize out from the findings to the larger population from which the sample was taken (Bryman and Bell, 2007:169). However, the reason for using a questionnaire in this study was not for purposes of generalization, but rather to gather evidence, as Hammersley said, that would help to 'inform judgements' rather than to uncover 'guaranteed truths or completeness' (see section 4.3.1 above) (Hammersley, 2005: 12).

A further preoccupation of quantitative researchers is with causality: 'Quantitative researchers are rarely concerned merely to describe how things are but are keen to say why things are the way they are' (Bryman and Bell, 2007:168). As Davies says, data gained from questionnaires can clarify the importance of factors influencing outcomes (Davies, 2004:1). Bryman and Bell give the example of research being undertaken into motivation at work, saying that a quantitative researcher is unlikely to be interested simply in the proportion of employees who are motivated, or otherwise, but would want to look at the causes of the degree of motivation. In the context of this study, the focus in the questionnaire is not so much on measuring the proportion of attendees who are satisfied or not, but rather on examining what is behind their satisfaction or dissatisfaction with the conference and the destination.

Bryman and Bell consider the criticisms levelled at quantitative research (Bryman and Bell, (2007:174). Foremost is that quantitative researchers can tend to study people and institutions as though they are observable, immovable objects (of the natural, scientific world), rather than living breathing beings who interpret the world around them and whose interpretations may change as a result of numerous factors. A further criticism arising from this is that the sense of precision and accuracy in the measurement process is 'artificial and spurious'. They discuss how measurements can be skewed simply because respondents will have different understandings of terms used in the questions, for example. Although one advantage in this study of the use of a questionnaire was that it enabled the researcher to control the variables she wanted to gain information on, a

disadvantage could have been that understanding of terms used in the questions was not controllable. For example, the term 'expensive' in question 17 could mean something very different to somebody on a high salary and someone on a low salary; the values 'very good' and 'very bad' could include a wealth of different connotations for different respondents, of which the questionnaire format does not allow for exploration. Whereas in an interview, it is possible to 'unpick' responses and ask further, clarifying questions (even if this can lead to interviewees being 'led' in some way), a questionnaire does not allow for this. Another effect of a positivist view of the world is that quantitative researchers may fail to take into account the potential for imposing or assuming relationships between the variables they are studying, inventing relationships of causality, for example, without considering that that relationship might not be the only possible one, or even the true one.

Despite these criticisms, the advantages afforded by the use of a questionnaire were still considered to be reliable enough for use in this study. Regardless of whether respondents interpreted terms differently, the results would give the researcher indications of the values given to the factors she was researching; the results were seen as indicative of general trends and tendencies (in attitudes and perspectives), information about which would help in addressing the research aim. Clearly, a questionnaire imposes certain limitations on the gathering of data; it may be possible, for example, to discover how many respondents believe that Saudi Arabia has the potential to be a global leader as a conference destination, but the questionnaire does not allow for follow-up questions to this which might ascertain the different reasons why respondents believe this to be true, or not. The fact that the findings from the questionnaire will be considered in conjunction with the findings from the interviews will balance out some of the weaknesses discussed above.

With regard to the more practical advantages of using a questionnaire, Wallace points out that a questionnaire is more time-economical if a large amount of information needs to be collected (Wallace, 1998). The questionnaire in this study enabled the collection of data on a range of areas from the perspectives of as many delegates as possible and in the time context of conferences lasting for between two and three days, when delegates had limited time available. The researcher had very limited time to undertake the research as delegates were often in seminars and, when they weren't, were still often busy

networking. The use of a questionnaire was therefore convenient to both the researcher and the respondents, allowing for the distribution of a number of questionnaires directly to attendees at the conferences, and allowing for respondents to complete them at times that were convenient to them, such as breaks. Questionnaires also mean that respondents are not affected by interviewer variability as interviews are (that is, being affected by differences between interviewers in, for example, approach, personality, and so on) (Bryman and Bell, 2007:242). One of the tasks of the questionnaire writer is to avoid ambiguities, but one of the advantages of questionnaires is that respondents have to deal directly with the questions they are asked without the intervention of the questioner to clarify ambiguities and meaning (Seymour, 2001). According to Seymour, this means that responses are not coaxed out of the respondents by rephrasing of the questions in order to get a specific response and there is therefore, particularly if anonymity is clearly guaranteed, no coercion of the respondent and no sense of obligation or necessity to respond in particular ways (Seymour 2001),.

With regard to the disadvantages of questionnaires, Bourque points out, in contrast to the previous point above, that questionnaires must stand alone – that there is no interviewer present to clarify instructions or provide additional information (Bourque 2003). Bryman and Bell also see the lack of an interviewer who can prompt the participant or probe their answers more deeply, as a potential disadvantage of relying on questionnaires (Bryman and Bell, 2007:242-243). They, like Bourque, note that a questionnaire necessitates a reduction in the amount of data that can be obtained simply because it is difficult to ask a lot of questions and also because they must be dominated by closed-ended questions (the belief being that open-ended questions would deter respondents from completing the questionnaire unless they were highly motivated). Bryman and Bell also consider two factors which could have an impact on the reliability of the data: the fact that asking questions that are not salient to the respondent might result in them not completing the questionnaire (leading, therefore, to a situation in which it is difficult to gather particular, pertinent, data); and the fact that respondents can read through the whole questionnaire before completing it, thereby potentially being influenced by information and factors covered in later questions in their responses to earlier questions (Bryman and Bell, 2007: 243).

Many of these disadvantages of questionnaires are, to some extent, balanced out by the use of interviews in this research. The interviews afforded the researcher the opportunity to ask more open-ended questions, to probe, and to ask questions that, although not directly pertinent to the interviewee, would probably still gain a response. A discussion of the ways in which the mixing of methods contributes to the research study, and what exactly the questionnaire enabled the researcher to do, is given in section 4.3.1 above. A more detailed discussion of how the use of qualitative data collection through interviews might balance the disadvantages of quantitative data collection (and vice versa) will be given in section 4.3.4.i

#### **4.3.3.ii Design of the Questionnaire**

The questionnaire (see Appendix A) was designed to address, primarily, the first objective: to assess the capacity of the KSA to host international conferences. This was done by gathering data on perceptions of what was negative and positive about current provision of international conferences in the KSA, and on perceptions of the kingdom's capacity to be an international conference destination (see research questions 1.i and 1.ii). The questionnaire also directly addressed one of the research questions connected to the third objective of the study (see research question 3.i and 3.ii), using data gained on international conferences in the UAE to illuminate the factors that might support and/or inhibit the kingdom's potential in this field. Although it was not designed to directly address the second objective, with its focus on exploring the social and political feasibility of Saudi Arabia developing this industry, relevant findings from the quantitative data are integrated into the discussion of the findings from the qualitative data concerned with this aspect. Questions in the questionnaire connected to visas, entertainment, gender segregation, for example, as well as to participants' overall perceptions of the country as an international conference destination, were asked in the knowledge that these areas would impact on the country's capacity to develop the industry; the researcher was aware, however, that these factors were associated with the socio-political context in Saudi Arabia and that the results might therefore serve to clarify, illustrate or expand upon the main findings from the interviews, which were explicitly aimed at eliciting information connected to this context (see Table 4.1). For this same reason, the research question concerning socio-political factors in the UAE that

might illuminate those in the KSA (see research question 3.iv) was also addressed indirectly through the questionnaire.

The design of the questionnaire was based on an investigation of the literature and other research carried out in the area of conference tourism, which helped to identify the main themes and issues relevant to the field and to the research objectives. It was particularly informed by factors affecting the conference attendance decision-making process, which were framed within an expanded discussion of three of Yoo and Chon's five categories: destination stimuli, safety and health, and travelability (Yoo and Chon, 2008). One item in the questionnaire that was not the focus of any previous research in the field was gender segregation, a factor relevant to the Saudi context that it was thought necessary to include.

The first section was designed to elicit general demographic information about the respondents (including information on gender, region of origin, type of work they were involved in, and region of work). Significant results from this section, showing, for instance significant differences between the sample group in the KSA and in the UAE, were used, if relevant in discussion of the findings in the conclusion to chapters 5 and 6, and in chapter 7.

As a means of gaining information on the extent to which participants' responses were influenced by previous experiences of international conferences, and any experience of the Middle East (and Saudi Arabia and the UAE specifically), questions 5 to 14 in the questionnaire focused on these areas. A further aim was to distinguish whether any of the 'pull factors' of other Middle East destinations, as identified by participants, might be applicable to the KSA and therefore contribute towards its potential to attract delegates and meetings planners to international conferences there.

The following four questions, numbers 15 to 18, formed the main body of the questionnaire. They were designed to specifically elicit data that would address the research objectives, with each question drawing out participants' views and perceptions of, for instance, factors connected to the practical provision of the conferences, factors connected to the broader context in which the conferences were held and factors connected to their impressions of the capacity of both countries to be international

conference destinations. Questions 15, 17 and 18 were Likert-scale questions, measuring respondents' views of importance, agreement and assessment of the quality of a range of factors. Question 15 focused on the importance respondents attributed to a variety of factors in their choice of the destination (either the KSA or the UAE). Question 17 was designed to measure respondents' agreement with a number of statements regarding the destination and the provision and organisation of conferences there. Question 18 aimed to measure respondents' post-conference attitudes towards the KSA / the UAE, in order to ascertain whether their perceptions had changed to become more positive or more negative. This would provide information as to whether delegates were likely to return and to recommend the destination to others.<sup>3</sup>

The final question in the questionnaire was an open-ended one asking for what participants perceived to be the main problems with attending conferences in the KSA / the UAE. The question was designed to obtain any information the researcher may not have been aware of and to give respondents the opportunity to express in their own words their views on what they perceived these to be. The benefits of open-ended questions are various, but in this instance, included being able to avoid limiting subjects to pre-defined areas and to avoid cueing non-spontaneous themes or issues (Elig and Frieze, 1979:46).

The English version of the questionnaire is given in Appendix A and the Arabic translation in Appendix B. It was translated into Arabic to enable a greater number of Arabic speakers to complete it. All Arab delegates were given the choice of the English or Arabic versions; the majority chose the English version. The translation was examined by native Arab speakers who were fluent in both languages.

The reliability of the questionnaire was tested. Reliability may be defined as the level of internal consistency or stability of the measuring device within each application and over time (Nunnally, 1970). Cronbach's reliability coefficient was used to test the reliability of the scales in the questionnaire; because of the high degree of sensitivity this method offers in comparison with its alternatives, it is the most recommended method for assessing reliability (Suen, 1990). Cronbach's reliability coefficient was computed for each factor (domain) and total scale to measure internal consistency. An item-total

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<sup>3</sup> Question 16 was used as a means of testing the validity of the answers to Question 17

correlation between an individual item and the sum of the remaining items on a factor or total scale was calculated to further assess reliability.

Cronbach's alpha reliability coefficient normally ranges between 0 and 1. However, there is actually no lower limit to the coefficient. The closer Cronbach's alpha coefficient is to 1.0 the greater the internal consistency of the items in the scale (Gliem and Gliem, 2003). George and Mallery provide the following rules of thumb: ' $> .9$  = Excellent, ' $> .8$  = Good, ' $> .7$  = Acceptable, ' $> .6$  = Questionable, ' $> .5$  = Poor, and ' $< .5$  = Unacceptable (George and Mallery, 2003:231). Gliem and Gliem mention that an alpha of .8 is probably a reasonable goal (Gliem and Gliem, 2003). In the same respect, Nunnally mentions that reliability coefficients above 0.90 are considered necessary to make individual decisions with instrument results; above 0.8 are considered suitable for research; and above 0.70, useful for initial group decisions that will be tested through additional means (Nunnally, 1970).

In this research, Cronbach's coefficient alpha was used to calculate the internal consistency coefficients of the items included in sub-scales A, B and C, the scales in part three of the questionnaire. Results of the reliability analysis showed that the items in these scales had a satisfactory discriminating power.

As shown in table 4.4, results of the reliability analysis showed that the items in these scales had a high internal consistency (see Appendix C for total-item statistics). The reliability coefficient alpha obtained for the scale (32 items) was 0.86. As far as the subscales were concerned, the reliability for subscale A (9 items measuring the 'Factors influencing the choice of KSA and UAE as international conference destinations' was 0.60; the reliability for subscale B (15 items measuring perceptions and attitudes of conference venue and destination) was 0.79; and the reliability for subscale C (6 items evaluating the conferences and the destinations) was 0.84.

Table 4.4: Total Reliability Statistics

Scale	Cronbach's Alpha	N of Items
<b>Total</b>	<b>.86</b>	<b>32</b>
Q 15 (Sub- scale A) Factors influencing the choice of KSA as an international conference destination	0.60	9
Q17 (Sub- scale B) Statements measuring perceptions and attitudes of conference venue and destination	0.79	15
Q18 (Sub- scale C) Statements evaluating the conferences and the destinations	0.84	6

Source: Author, 2009

#### 4.3.3.iii The Pilot Study

Prior to being piloted, the questionnaire was given to two colleagues and supervisors in order for them to check the accuracy and clarity of the phrasing of the questions and the appropriateness of the question types, as well as to give their opinions on the content. In order to assess more accurately the comprehensibility of the questions, to identify any unclear content or flaws in the design, and to allow opportunities for review and development of the questions, a pilot study was undertaken. This also allowed for assessment of the time taken to answer the questions since, as Kitchin and Tate (2000:219) point out, the quality of responses can be negatively affected and validity therefore compromised, if the questionnaire takes too long.

The pilot study was carried out on the first day of the GITOF conference in Jeddah, the first day being considered to be less likely to furnish the researcher with experience-rich data. The questionnaire was given to ten delegates and analysis of their responses indicated that there was no difficulty with the questions. The respondents were approached during the lunch break to ensure they would have had at least some experience of the conference on which to base their answers. Only international participants were approached, as the research was aimed at international delegates, and participants were chosen randomly. Analysis of the results, as stated above, indicated that there were few problems with answering the questions.

Respondents were asked to note how long it had taken them to complete the questionnaire so that an estimated time for completion could be given to respondents in the final study. The time varied between ten and fifteen minutes. Two participants in the Pilot looked reluctant to answer the questionnaire and asked how long it was; they were given a copy to scan and expressed relief that it didn't look too weighty. This was some measure of confirmation that the layout and size of the questionnaire would not detract people from answering it.

#### **4.3.3.iv The Sample Groups for the Questionnaire**

In this study, the sample was chosen on the basis of convenience: 'In convenience sampling, participants are selected because they are accessible and are therefore relatively easy for the researcher to recruit' (Saumure and Given, 2008) and because they meet the criteria of the research (Phua, 2003). The researcher was able to travel to the two conferences being studied and was aware that the delegates there made up a "captured" group (Phua, 2003), with the only three pre-established criteria for framing the population at the conferences being: firstly, that the population was international (that is, in Saudi Arabia, it included people from outside Saudi Arabia, and in the UAE, included people who came from countries outside the UAE); secondly, that the population were not based in the country where the conference was held; and thirdly, that the population consisted of people whose sole reason for being there was to participate in the conferences chosen for the research study. The empirical evidence gained from the sample group was not required in order to present statistical truths that would answer the research aim and objectives; rather this evidence was required as a contribution to increased understanding of the situation in the KSA. For this reason, the use of a sample selected according to convenience, and not selected according to probability (necessary for ascertaining 'truths'), was deemed sufficient.

Questionnaires were distributed at each of the four conferences described above. They were mainly distributed at the beginning of the day as delegates arrived at the conference centre, although some were distributed during break times if insufficient numbers had been targeted previously. The questionnaires were distributed by the researcher, her husband when necessary (due to segregation requirements) and two volunteers. A full

explanation of the aims of the survey, the promise of confidentiality and the independent nature of the research was clarified at the top of the questionnaire. The researcher and helpers circulated throughout the day to collect completed questionnaires (see 4.3.3.5 below for a discussion of these) and informed delegates that they could hand them back to one of the conference assistants on the door if they had not been collected by the end of the day. The final sample consisted of one hundred and fifty seven conference delegates: seventy one attending the two conferences in the KSA and eighty six attending the two conferences in the UAE. There are various inter-connected reasons for the sample group being small in Saudi Arabia. Although statistics showing the percentage of international visitors to the two conferences were unavailable, the researcher observed that the proportion of international visitors to national visitors was small at both conferences, thereby limiting the number of delegates available to participate. Added to this were the difficulties created by segregation; as the majority of delegates at the Saudi conferences were male, and the researcher is female, it was difficult gaining access to male delegates; had the researcher been male, it would have been possible to have attended all sessions alongside the delegates, and spent break times with them, and this would have afforded more opportunities to ask delegates to participate. Coupled with this was the lack of practical support given to the researcher by the organisers of the conferences; a system could have been created, if the value of the research been appreciated, that would have eased access to male international delegates. These difficulties are discussed in more detail in the 'Data Collection Difficulties' section (4.3.3.5) below.

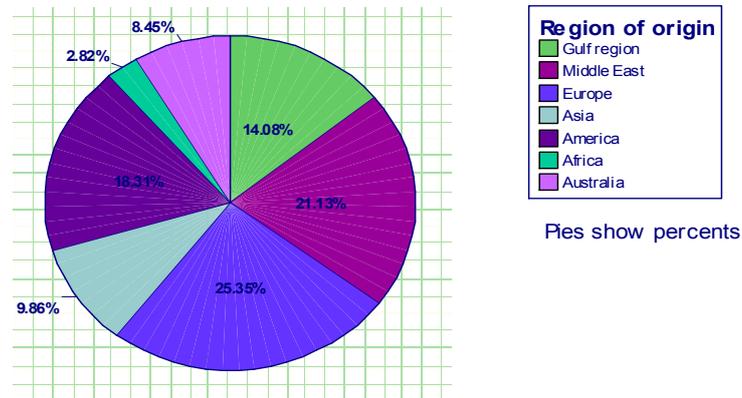
Table 4.5 below gives a breakdown of the nationalities of survey participants at the conferences in the UAE and the KSA. The table indicates the spread of nationalities of the delegates attending the conferences who agreed to participate in the research. In Saudi Arabia, participants came from a total of twenty nine countries, twenty of which were outside the Middle East region. In the UAE, participants came from a total of twenty three countries, twenty of which were outside the Middle East region. These figures indicate the international flavour of the conferences.

Table 4.5: Nationalities of Delegates

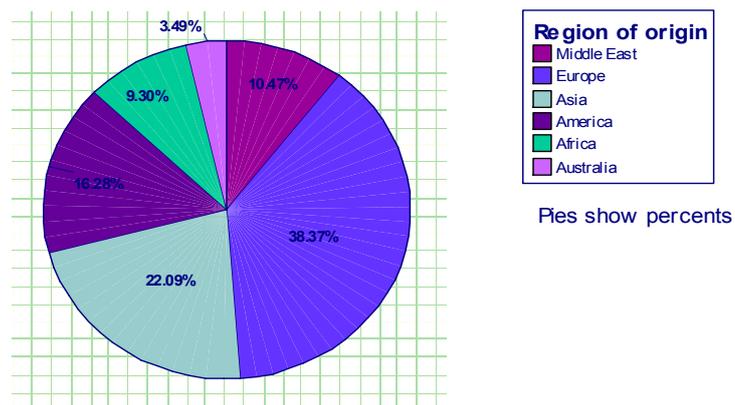
KSA			UAE		
Nationality	Frequency	Percent	Nationality	Frequency	Percent
American	9	12.7	American	9	10.5
Egyptian	8	11.3	British	8	9.3
Australian	5	7.0	Indian	8	9.3
British	4	5.6	South African	8	9.3
German	4	5.6	German	7	8.1
Omani	4	5.6	Canadian	5	5.8
Armenian	3	4.2	Italian	5	5.8
Canadian	3	4.2	Singaporean	5	5.8
Indian	3	4.2	Belgian	4	4.7
Lebanese	3	4.2	Egyptian	4	4.7
Bahraini	2	2.8	Russian	4	4.7
Jordanian	2	2.8	Lebanese	3	3.5
Kuwaiti	2	2.8	Australian	3	3.5
Palestinian	2	2.8	Dutch	2	2.3
South African	2	2.8	Malaysian	2	2.3
Swiss	2	2.8	Syrian	2	2.3
Austrian	1	1.4	Thai	1	1.2
Bangladeshi	1	1.4	Vietnamese	1	1.2
Chechen	1	1.4	Chinese	1	1.2
French	1	1.4	Netherlands	1	1.2
Greek	1	1.4	Austrian	1	1.2
Irish	1	1.4	Spanish	1	1.2
Malaysian	1	1.4	Austrian	1	1.2
New Zealand	1	1.4			
Qatari	1	1.4			
Russian	1	1.4			
Singaporean	1	1.4			
Spanish	1	1.4			
UAE	1	1.4			
Total	71	100.0	Total	86	100.0

Source: Author, 2009

Figures 4.3 and 4.4 below provide a breakdown of regions of origin of survey participants. What is apparent is that in both the UAE and Saudi Arabia, over 50% of the participants sampled were from the West (58.13% and 52.11% respectively). The regions of origin of survey participants in both countries differed in that in the KSA, just over a third (35.21%) of participants were from the Gulf and the Middle East regions, whereas in the UAE, only one tenth (10.47%) of participants were from the Middle East, and a larger percentage of participants were from Asia (22% in the UAE compared with not quite 10% in the KSA).

Figure 4.3: Sample by Region of Origin: KSA

Source: Author, 2009

Figure 4.4: Sample by Region of Origin: UAE

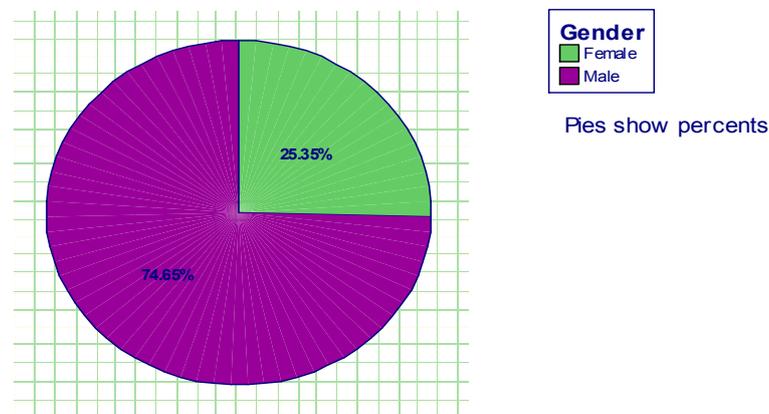
Source: Author, 2009

As far as potential bias in the findings is concerned, it seems probable that the delegates from the Gulf region might base their responses on information, knowledge and understanding that the other research participants do not have. For example, in response to questions regarding safety, their familiarity with the culture might make them feel a greater sense of safety than participants with no familiarity with the culture (or with a negative image of the culture) would feel. A skew in the results might also be apparent, for example, in the part of question 15 asking whether the opportunity to experience Saudi culture influenced their choice of the KSA as a destination. On the other hand, in response to questions asking for their opinions of the potential of the KSA to become an

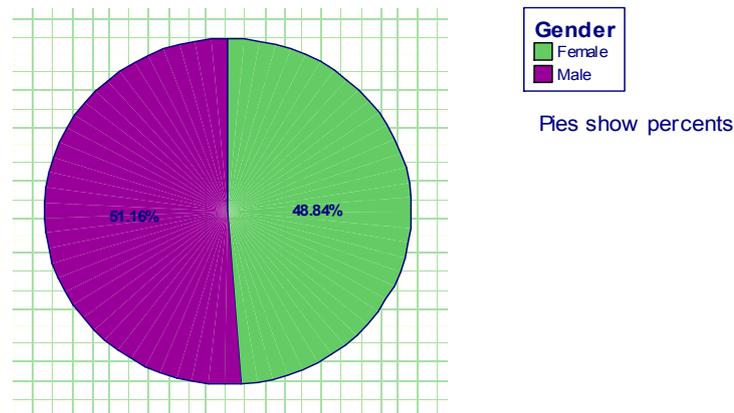
established international conference destination (see question 17), it was possible that survey participants from the Gulf might be more critical if they compared the provision of conferences in the KSA (taking into account such factors as infrastructure, segregation, practical organisation, and so on) to provision in their own country (particularly in light of them sharing cultures and having similar capabilities).

With regard to gender, Figure 4.5 and 4.6 below show the percentages of females and males making up the research sample at both conferences. Again these percentages reflect the composition of the total population. The percentage of female participants in Saudi Arabia makes up only 25% of the total, a quarter as opposed to half the number of participants in the UAE. This reflects the situation with regard to the barriers placed on the equal participation of women in public contexts in Saudi Arabia (and the lack of these barriers in the UAE).

Figure 4.5: Sample by Gender: KSA



Source: Author, 2009

Figure 4.6: Sample by Gender: UAE

Source: Author, 2009

#### 4.3.3.v Data Collection Difficulties

In order to conduct the research at the four conferences, permission was needed. Permission was granted by the relevant bodies and support for and interest in the research expressed. However, the attitudes of the organisers of the conference did not match the enthusiasm for the research shown by those giving permission and very little was done to assist with, and show support for, the logistics of distributing and collecting the questionnaires.

At the JEF, for example, the researcher was not given permission to place a box for returned questionnaires on the table in the conference entrance hall. This would have enabled a more professional and measured approach to the collection of the questionnaires and may thus have granted the research more credibility, possibly leading to the return of a greater number of completed questionnaires. No reason for the refusal was given. As it was, the method for collecting the completed questionnaires was based on the researcher and her team moving around and randomly asking people if they had completed questionnaires to hand in.

The researcher was permitted, however, to inform delegates that they could leave their completed questionnaires with a conference helper at the reception and information point by the door. The problem with this was that the helpers at the information point changed

shifts and it was difficult to ensure that all questionnaires would be handed on to the following helper, who would then assume responsibility for ensuring they were returned to the researcher. If the conference organisers had recognised the possible significance of the research to their work, they may have been more likely to have been supportive of the efforts to gather data.

The reasons for this reluctance to support the research are difficult to assess although it is likely that the simple lack of a research tradition in the kingdom leads to a lack of understanding of, and respect for, its value. The researcher also questions whether there was a reluctance on the part of the organisers to have their name associated with a research study that they had no control over..

Similarly, although the organisers of GIBTM in Abu Dhabi were supportive of the research and granted the researcher permission to hand out the questionnaires during the conference, they would not permit the researcher to place a questionnaire in the information bag given to each delegate at the beginning of the conference. They did, however, express a marked interest in the results of the research and themselves carry out a similar survey each time GIBTM is hosted: the results of their surveys could usefully have been compared with the results of this survey.

A further area of difficulty with the data collection was created by the segregation of men and women at the conferences in Jeddah. Because of this segregation, it was necessary to ask men working at the conferences to distribute questionnaires in the men's hall. They needed to be flexible enough to be able to fit this in with their other duties and to be able to persevere with distributing questionnaires at different times. The researcher was not able to be fully in control, as a result, of the methods and efficiency of the distribution. Two female organisers at the conference were also asked for their assistance with distributing the questionnaires but were not prepared to offer it, leaving the researcher solely responsible. It was therefore difficult to put into practice a systematic approach for distributing and collecting the questionnaires.

The difficulties discussed above also impacted on the data collection process based on interviews, particularly with regard to the lack of easy access the researcher had to male delegates and the complications of needing to be accompanied by a male when

interviewing male delegates and officials. These, and other difficulties, will be pointed to, when relevant, in the following section.

#### **4.3.3.vi Analysis of the Quantitative Data**

The main analysis was carried out using the SPSS 15.0 system for Windows, which allows a range of statistical techniques to be used. Before conducting the main analysis, a preliminary investigation of the data was carried out. The purpose of this was to ‘inspect the data file’ and ‘explore the nature’ of the variables (Pallant, 2007:51). Frequency testing was used on each of the items in the questionnaire. A frequency distribution gives the number of cases in each category (Bryman and Cramer, 2001) and can lay the basis for more complex analysis afterwards. The descriptive and frequency statistics produced in the preliminary stage had a number of uses. Firstly, they enabled checking for errors and making necessary omissions. They also provided an overall picture of the coverage of the data: describing and summarizing variables as separate units; considering the range of values; noting the central tendencies in the values; and examining the patterns of responses to the individual variables. Finally, it served to isolate extreme values (outliers) so that results were not distorted by them, and to ensure that they were not the result of inputting incorrect data (for example, the number ‘7’ instead of the number ‘79’).

The preliminary investigation provided information on mean scores, median scores, standard deviations, skewness and kurtosis. The main analysis of the quantitative data, carried out through means scores, percentages and standard deviation scores for each location, was based on the descriptive statistics. In order to ascertain whether there were differences both within each sample and between the two samples, when relevant, results were cross-tabulated: cross-tabulation describes two or more variables simultaneously and reflects the joint distribution of these with a limited number of categories or distinct values (Malhotra, 1999).

Once the existence of any differences was established, various tests were used to check for the significance of these differences. Chi-square tests, t-tests or Mann-Whitney U tests were used depending on the results of the normality test. If the results were not normally distributed, non-parametric tests (in this case, Chi-square tests and Mann-Whitney U

tests) were used. Chi-Square Tests for independence are used when there are two categorical variables, with two or more categories, in order to determine whether they are related. A comparison is made between a) the observed proportions or frequencies of cases that occur in each of the categories, and b) the values that would be expected if there were no relationship between the two categorical variables (Pallant, 2007: 214). Mann-Whitney-U tests are used to test for significant differences between two independent variables on a continuous measure (Pallant, 2007:220). One of the variables needs to be categorical, with two groups, and the other needs to be continuous. This test compares median scores rather than mean scores (in contrast with t-tests). If the results were normally distributed, t-tests were used. T-tests compare the mean scores on a continuous variable of two groups and show whether there is a statistically significant difference between these. Independent sample t-tests were used as the two groups being compared were different (independent) groups of people (Pallant, 2007: 101) (in this case, people in the KSA and people in the UAE).

A Factor Analysis was carried out to derive a relationship among a small number of 'factors' or dimensions from the larger number of items (Green et al., 2000). To test for the appropriacy of a factor analysis, by checking for sampling adequacy and the significance of the factor loading, the Kaiser–Meyer–Olkin (KMO) test and the Bartlett's Test of Sphericity were employed: these tests indicated that the data and the sample size were adequate for a factor analysis to give stable factors. Before comparing the component scores of the KSA and the UAE, a Kolmogorov-Smirnov test was carried out to assess the normality of the distribution of scores; this enabled decisions over whether to use t-tests or Mann-Whitney U tests to check for significant differences between the two groups.

#### **4.3.4 Qualitative Data: The Interviews**

This section will describe the factors associated with the qualitative research methodology used in this study, carried out through interviews. It will be structured similarly to the previous section on the questionnaire, looking at: the justification for using interviews; the design of the interviews; the sample groups; the methods of analysis

of the data collected; and, finally, an account of the difficulties encountered in carrying out the interviews. It is important to point out that this phase of the data collection involved not only attendees at the conferences, but also officials involved in the organisation and management of the meetings industry in the two countries. Not only was it considered that the two methods would complement each other, but it was also thought that data gained from the different participant groups could also do this, serving to broaden the range of the enquiry and to elaborate on each other.

#### **4.3.4.i Justification for Using Interviews**

According to Creswell, qualitative research is conducted because ‘a problem or issue needs to be explored’ (Creswell 2007:39). As a way to explore Saudi Arabia’s potential to develop this niche, it was considered that interviews would be effective in gaining the perspectives of delegates on the conferences in the KSA and the UAE, and in gaining the views and knowledge of people involved in the organisation and management of conferences in these countries. With regard to the delegates, interviews were seen as a way to enhance the data gained from the questionnaire (Bryman, 2006): interviewees were given the opportunity to elaborate on their views and understanding of the conferences in question – and of the wider issue of the UAE’s and the KSA’s suitability as international destinations. Data gained from interviews with the officials would also serve to enhance, clarify and illustrate the data gained from interviews with the delegates and the findings of the questionnaire completed by the delegates. In the section ‘Mixed Methods’ (4.3.1 above), one of the rationales for using mixed methods pointed to by Greene, Caracelli and Graham was for the purpose of ‘expansion’, that is, ‘seeking to expand the breadth and range of inquiry by using different methods for differing components’ (Greene, Caracelli and Graham, 1989, cf. Johnson et al 2007; 116). However, in this case, it is not only different methods that are used to expand the breadth and range of the inquiry, but different sample groups with different perspectives and different understandings of the industry - data gained from interviews with the officials would add breadth and knowledge and more factual understanding of policies and official data and objectives to the more experientially-based observations and views of delegates. Whereas the delegates might not know these details, and there might therefore be gaps in their understanding of the situation, it is also true that the officials might have a through

understanding of such details but be unaware of how delegates are experiencing the conferences and the wider provision. Both sides of the picture are necessary to gain an overall view.

Interviews would also help to clarify participants' main concerns and views or uncover new viewpoints or contradictions that would add to the exploration of how people were viewing the potential of the KSA and the UAE to be international conference destinations. Whereas the data gained from the questionnaire gave indications of the attitudes and beliefs of delegates, it was hoped that the data gained from the interviews with both groups would serve to explain and illuminate the reasons behind these attitudes, providing, according to Johnson, Onwuegbuzie and Turner 'richer, more useful and more meaningful answers to the research questions' (Johnson et al., 2007:121).

Unlike with quantitative research, the purpose of conducting interviews is not to look for consistency in findings, but to see what different people say (Donmyer, 2008:714) - this range of perspectives may be similar or not, but will create a broader picture of how Saudi Arabia and the UAE are being perceived and rated as conference destinations by the delegates, and how they are being conceived of with regard to development, by officials. Bryman and Bell point to the differences between qualitative and quantitative research, state as being that whereas quantitative research is carried out from the perspective of the researcher, qualitative research focuses on the point of view of the participants (Bryman and Bell 2007:425). In this study, although the questionnaire was based very much on the perspective of the researcher and her reading of the literature and previous research, and although this fed into the types of questions asked in the interviews, the interview gave participants more space to express their views, expand on their views, and to express what they wanted to without being constrained by the question to the same extent as they would have been in the questionnaire. The space was available for unprompted, genuine responses to be made and, therefore, offered the researcher the opportunity to see 'through the eyes of the people being studied' (Bryman and Bell, 2007:416).

A discussion of the ways in which the mixing of methods contributes to the research study, and what exactly the interview enabled the researcher to do, is given in section 4.3.1 above.

#### 4.3.4.ii The Sample Groups for the Interviews

Two different groups were interviewed. The first group included delegates attending conferences in the KSA or in the UAE. These participants were selected during the questionnaire phase: delegates who returned their questionnaires to the researcher were asked whether they would be prepared to participate further by being interviewed. The delegates therefore formed convenience samples as they were the ones 'readily accessible to the interviewer' (Phua, 2003). The second group included officials involved in the conference industries in the KSA and the UAE. These officials were selected as they were most likely to have a thorough and direct understanding of the workings of the industry in those locations because of the work they did; for reasons of confidentiality, it is not possible to give full details of the positions they hold. This sample was therefore selected purposively and judgmentally; the interviewees were selected using personal judgment based on knowledge of their positions and experience (Saunders, 2000).

With regard to the first group, five western delegates attending the two different conferences in Saudi Arabia were interviewed (see Table 4.6). Three people from this group - Nick, Dora and Pedro (respectively, two academics involved in tourism, the first from Australia and the second from South Africa, and a Spanish member of the World Tourism Organisation) - were attending the Gulf Investment and Tourism Forum (GITOF), 2008. The remaining two participants - Sally and Flo (respectively, a Swiss journalist and an Australian whose profession is unknown) - were attending the JEF, 2008. The size of this sample was dictated to a large extent by the constraints imposed on the interviewer as a female in a segregated context. There were more male delegates than female delegates at the conferences (see Figure 4.5 above) and a male would have had greater opportunities to gain access to these delegates. However, the length of the interviews (over an hour each) and the amount of rich data collected, to some extent balances out the small sample size, as does the fact that four of the five delegates had previously visited the KSA and therefore had a broader experience of the country to draw on in their responses.

Table 4.6: Participants at Conferences in Saudi Arabia

Interviewee	Gender	Origin	Nature of Expertise	First Visit?	Conference Attended
Dora	Female	South Africa	Academic, Tourism	No	GITOF
Nick	Male	Australia	Academic, Tourism	No	GITOF
Pedro	Male	Spain	WTO Member	Yes	GITOF
Flo	Female	Australia	Unknown	No	JEF
Sally	Female	Swiss	Journalist	No	JEF

Source: Author, 2009

Three (male) western delegates attending both of two conferences in the UAE, the GMEC and the GIBTM were also interviewed (see Table 4.7). Only three of the people approached for interview responded and, as the interviews with these three were conducted by e-mail, the responses from this group tend to be more limited than those of the delegates interviewed face-to-face. However, two of the three delegates attending conferences in the UAE work directly in the conference industry, and this may have an impact on the level of understanding and information they draw on in responses to the questions in the interviews. For reasons of anonymity, further information regarding their roles in the industry cannot be disclosed. Again, the size of the sample here is relatively small; this was due to different reasons to those given for the size of the sample in the KSA. In the UAE, because delegates were busy attending the range of workshops and seminars on offer, as well as the exhibition, and because many were attending both conferences, very few of them were able to spare the time for interviews, and those who did offer to participate could only spare the time to do so through email interviews<sup>4</sup>. However, the limitations created by the small sample size were to some extent outweighed by the breadth and depth of experience of international conferences that the interviewees had to draw on.

Table 4.7: Participants at Conferences in the UAE

Interviewee	Gender	Origin	Nature of Expertise	First Visit?	Conferences Attended
Darren	Male	USA	Hospitality Industry Leader	YES	GMEC & GIBTM
Keith	Male	Canada	Corporate Purpose Definer & Events Designer	NO (2 <sup>nd</sup> visit)	GMEC & GIBTM
Duncan	Male	USA	Leader in Global Meetings Industry	NO (7 <sup>th</sup> visit)	GMEC & GIBTM

Source: Author, 2009

<sup>4</sup> The advantages to, and limitations of, email interviews in qualitative research are discussed under the section entitled 'The Design of the Interviews' (see 4.3.34.iii below).

As far as the delegate groups were concerned, the trustworthiness of their responses was established primarily by them meeting the criteria for the sample group – they were international delegates at the conferences selected for the research purposes. The fact that interviews were conducted during the conferences meant their answers were more likely to be directly related to their current experience. Questions were asked which were designed to elicit their responses to these conferences and their overall experience in the countries concerned, to unearth any images they had of the countries as conference destinations that may have been based on other influences, and to illuminate any socio-political factors that were seen by them as being significant. The fact that two of the three delegates at the UAE conferences were involved in the meetings industry could have had an effect on the responses they gave which may not have been the case with delegates who had no direct experience of the industry. Responses could either have been more critical (as a result of them being more aware of all factors contributing to successful conferences and therefore what may have been lacking at the two being studied) or more positive (their work depends on the success and positive marketing of the industry).

With regard to the second group that was interviewed, this involved people from both the UAE and Saudi Arabia whose work is connected to the organisation and provision of conferences; their views on the development of this industry from both a global and a regional perspective are considered. Both people interviewed in Saudi Arabia work in the Saudi Chamber of Commerce, one in Riyadh and one in Jeddah, and both hold positions connected to conferences. Of the two people from the UAE who were interviewed, one works for the Dubai Convention Bureau and the other for the MICE industry in Abu Dhabi. The size of this sample group is also small, but this is mainly due in the KSA, to the limited development of the industry there: there are few people who would be able to fully respond to the questions asked. Responses from both participants were, however, full and relevant. During the interviews with the officials in Saudi Arabia, the researcher needed to be accompanied by her husband; however, the researcher was still a female in the highly unusual situation in Saudi Arabia of asking a male questions and whether or not this impacted on the length and quality of information communicated is impossible to prove. However, the responses seemed full and transparent and the interviews proceeded smoothly.

#### 4.3.4.iii The Design of the Interviews

The interviews were designed to meet the objectives of the study (see Table 4.1), particularly the second objective concerned with exploring the social and political feasibility of the Kingdom of Saudi Arabia developing as an international conference destination. Different questions were asked of the two groups, (the officials and the delegates). The questions for both groups, however, were designed to elicit answers that might contain information about socio-political factors, rather than directly asking for this information. The fact that the interviews were semi-structured meant that the questions were pre-determined, giving the interviewer control over the topics discussed (for instance, information and views on the participation of women, on obstacles to the development of the industry, on the potential of the countries to develop as international conference destinations and so on). The fact that the questions were also open-ended allowed for a range of responses (Ayres, 2008:810). This meant that it was possible not only for factors to arise which the interviewer may not have considered, but also for the potency of these factors, from the perspectives of the interviewees, to be explored. This reflects a further advantage of semi-structured interviews, they ‘have a flexible and fluid structure’ which ensures ‘flexibility in how and in what sequence questions are asked, and in whether and how particular areas might be followed up and developed with different interviewees’ (Mason, 2003).

A list of questions, to act as a framework for the interviews, was drawn up for both delegates (see Appendix D) and officials (see Appendix E) and were asked (or not) depending on what information had been given (or not focused on) in the interviewee’s previous responses. Additional questions were asked if further clarity was required or if a subject was raised that seemed to be relevant to the objectives.

Four of the five delegates from the conferences in the KSA were interviewed face-to-face and one was interviewed by email. The three delegates from the two conferences in the UAE were interviewed via email after the conferences, as they were unable to find the time during the conference to be interviewed face-to-face. Although email interviews differ from face-to-face interviews, there are a number of advantages to them. They are efficient and serve as a written resource to refer to. The richness of the data may be affected by the individual’s communication style but the synchronicity of the format

allows more time for reflection, and this may therefore, and in contrast, produce a richer quality of data (Egan, 2008:244). In direct opposition to this view is Selwyn and Robson's view that they do not provide such accurate reflections of a respondent's thought (Selwyn and Robson, 1998), and this could be because the chance of a spontaneous answer to a question is smaller, because the interviewee has more time to reflect on the question (Opdenakker, 2006) or even to research it. The spontaneity which is an advantage of face-to-face interviews (which also allow for observance of the process of coming to an answer rather than simply receiving the finished product of that process) is lacking in email interviews, and, as Opdenakker points out, 'spontaneity can be the basis for the richness of data collected' (Opdenakker, 2006). A further drawback of email interviews is that the interviewer does not have the opportunity to respond immediately to responses and that it is necessary to be very specific with the questions so as to avoid misinterpretations of what is being asked for (Dube, 2003). However, the necessity to employ email interviews was, dictated by the fact that a number of the delegates could not afford the time for an interview but offered to respond to questions by email.

Three of the four officials consented at the actual conferences to take part in face-to-face interviews. The fourth one did not attend the conference so he was contacted by phone and asked for his agreement. Each interview lasted for a minimum of one hour. In the UAE, the interviews were face-to-face took place during the conferences and lasted approximately one hour. Both the Saudi officials were interviewed in their offices after the conferences had finished. Because of the strict segregation laws in Saudi Arabia, I was required to be accompanied by my husband when interviewing the Saudi officials; females are seen in government offices extremely rarely in Saudi Arabia and prior to visiting the offices to conduct the interviews, I had thought it would have been impossible for me, as a woman, to enter the buildings. Clearly it is impossible to say how the interviews may have developed had the researcher been a male – would a man have asked different questions and would the responses have been more detailed and full? Despite some concerns that this may have affected the responses given to the questions, the researcher considered that the interviews developed into an open and full discussion of the issues and areas being focused on (taking into account the flow of interaction and the sense of ease) and did not feel a need to remove any of the questions on the schedule.

All the face-to-face interviews were audio-recorded and therefore needed to be transcribed into textual data for the analysis. A main advantage of audio-recording interviews is the fact that what is said during the interviews is accurately recorded and can be easily and frequently accessed if necessary. Transcripts are also a valuable source of direct quotations. The main disadvantage of audio-recording is that it can inhibit the interviewee from providing information that may be given if the responses were not being recorded (Morgan and Guevara, 2008:40). Interviewees were informed that their anonymity was guaranteed, so that there was more likelihood that they would discuss their views and experiences in an open way, and would not exclude issues that may be controversial through fear of this impacting on their work and privacy.

Although the term respondent (that is, respondent to a questionnaire survey) suggests a certain level of passivity, the term participant conjures up a more active, involved role (Seymour, 2001); to some extent, this can also lead to an interview being less of a neutral context and more of a context entailing responsibility and a sense of shared goals between participants. The issue of the extent to which interviewees respond with what they feel the interviewer is asking for, rather than being completely transparent, needs to be taken into account and highlights the need to ensure that questions are worded in a way that is not leading. The researcher attempted to ensure that the questions were not leading although it is extremely difficult to completely guarantee this; delegate participants at Saudi conferences, for example, may have neglected to give full answers to questions asked by a Saudi interviewer if they felt these might have been overly critical. However, the responses gained did express negative views as well as positive ones.

#### **4.3.4.iv Data Collection Difficulties with the Interviews**

The lack of documentation available on the industry in Saudi Arabia, combined with the lack of previous research into the field, meant that there were no precedents on which to base the interview questions and no information on the state of the industry which might have guided what the interviewer asked.

The lack of easy access, as a female researcher, to male delegates, alongside the limited time available to delegates outside the demands of their work and the conference, impacted on the collection of data through the interviews, as it did on the collection of

data through the questionnaire. The interviews with the female delegates were more easily carried out than those with the men; there was no need for the researcher to be accompanied by her husband, or for complex arrangements to be made regarding the location of the interviews. However, the fact that there were fewer female than male delegates led to it being more difficult to find a number of them who would agree to be interviewed.

With regard to the interviews with the officials in Saudi Arabia, there was a lack of suitable participants due to there not being one body responsible for that industry, but rather different people in different bodies being responsible for different aspects of it. This meant that there were very few officials with a comprehensive understanding of the industry in Saudi Arabia. Coupled with this were the challenges facing the researcher as a female wanting to interview males. This was complex not only in terms of arranging a time and place to interview them (they were not available during the conferences) and a male escort to accompany her, but, more importantly, in terms of the social stress created by a female interviewing males in completely male-dominated workplaces.

#### **4.3.4.v Analysis of Interview Data**

The interviews were transcribed and then analysed manually to discover common patterns and themes. The thematic approach to analysing data is very common; the most common in the social sciences, in Holestein and Gubrium's view (1997). According to Ayres, thematic analysis is:

‘...a data reduction and analysis strategy by which qualitative data are segmented, categorized, summarized, and reconstructed in a way that captures the important concepts within the data set.’ (Ayres, 2008:867)

The questions that were asked were, to a greater or lesser extent, general, inviting respondents to answer with their own perceptions and knowledge, rather than being guided into talking about particular factors. The data gained were themed through a process of coding all similar responses in each group. The coding revealed a number of factors which were touched on repeatedly, such as, for example, visa regulations, procedures for gaining permission to organise conferences. These factors were then

grouped together under themes which seemed to represent the important concepts behind them. The example codes given previously, for instance, were grouped under the theme of 'bureaucratic regulations'. These themes were then explored from the perspective of the research questions connected to the first objective; because of the research questions, the analysis of the data from both groups was initially carried out separately; however, cross-references were made throughout the discussion of the results when relevant (when similarities or differences became apparent, or when one group's comments elaborated on or enhanced the other's, and vice versa). The final conclusion of the chapter integrated the key results from the data gained from both groups, focusing on patterns that had emerged that were relevant to the objective.

#### **4.3.4.vi Trustworthiness of the Qualitative Research**

Whereas it may be possible to judge the validity of quantitative research projects by applying broadly applicable standards and criteria (such as ensuring generalizability through precise and thorough sampling), the issue becomes more complex with qualitative research projects as they do not generally have as their aim a need to measure. Mason argues that the meaning of the measures for validity in quantitative research (reliability, validity and generalizability) can be used for qualitative research, without the stress on measurement; that what needs to be focused on are 'the quality, rigour and wider potential of the research' (Mason (1996:21). If this needs to be investigated, however, in order to ensure that the quality of the research is clear, Guba and Lincoln propose alternative criteria, the most applicable to this study being 'trustworthiness' (looking at credibility, transferability, dependability, and confirmability).

(Guba and Lincoln, 1994, cf. Bryman, 2008:377).

With regard to 'credibility', Bryman argues that it is the feasibility of the researcher's account, based on different accounts taken from different respondents, that determines its acceptability (Bryman, 2008:377) and Given and Saumure emphasise the consequent importance of accurate representation of data (Given and Saumure, 2008). As well as selecting participants for the interviews whose responses would be credible in that they would be based on experience of the international conference industry in Saudi Arabia (and from the very different perspectives of producers of the experience and consumers of the experience), the data gained from the interviews derived from answers to questions

that were not leading, a fact which adds to its trustworthiness. The credibility of the data was also reinforced by thorough analysis of their responses and of the researcher's interpretation of these. Bryman argues that 'it should be apparent that he or she has not overtly allowed personal values or theoretical inclinations manifestly to sway the conduct of the research and findings deriving from it' (Bryman, 2008:379). The researcher employed an independent researcher with no prior knowledge of the subject or the Gulf context to read through the argumentation and interpretations she had made and to ask for verification and explanation of any gaps or any areas that appeared to be based on subjective understanding rather than on information provided by the data.

A focus on the extent to which the findings are manifestly based on the data brings to the fore the concept of 'confirmability'. Whereas with quantitative research, one of the main criteria for ensuring validity is a measure of objectivity, in qualitative research, the strategy of confirmability is becoming increasingly utilised. Given and Saumure argue that rather than the focus being on the data being unbiased, it is instead on the extent to which the findings and interpretations can be seen to be supported by the data (Given and Saumure, 2008:895).

Clearly, one of the issues possibly affecting the credibility of any qualitative research is the difficulty in replicating it. LeCompte and Goetz argue the impossibility of 'freezing' both the circumstances of an initial study and its social setting in order to make it replicable (LeCompte and Goetz, 1982, cf. Bryman, 2008:376). However, with regard to this study and reliability, because the main findings indicate that the Kingdom's potential to develop as an international conference destination is significantly affected by systems, attitudes, cultural mores and values which are deeply embedded in Saudi Arabia, it seems highly unlikely that a similar research study would produce different findings.

What is clear is that a rigorous approach to qualitative research is needed in order for the trustworthiness of the research to be proven. As Miller argues, extending the focus out from the data to all aspects of the research process:

'[u]ltimately .... most who do qualitative work agree that the validity of all research is heightened by ensuring that research procedures remain coherent and transparent, research results are evident, and research conclusions are convincing.' Miller, 2008:909

The reliability of this study, and the extent to which the conclusions are convincing, is enhanced by the use of a mixture of methods (see section 4.3.1 above) as well as by the use of a mixture of research sources. Bryman's research into the rationales used for mixed methods in a variety of research studies in journal articles reporting the findings of mixed method research, includes four that are relevant to this study (Bryman, 2008:609). The first of these is called 'offset' and refers to the belief that the weaknesses of one method can be offset by the strengths of another. The second rationale he summarized as 'completeness', this concept being based on the belief that a 'more comprehensive account of the area of enquiry' can be gained through the use of both qualitative and quantitative methods. Both of these could be seen to be influential in a further rationale he cites – 'credibility', which he says refers to suggestions made by research participants in his study that the integrity of the findings is enhanced by the employment of both methods. The concept of enhancement is a further rationale in its own right, described as 'augmenting, 'building upon' or 'making more of' the findings gained from one method with the findings gained from the other. According to Merriam, validity can be improved by using different strategies such as multiple sources and multiple methods (Merriam, 1998). This study has done just that – relied on multiple sources and two methods.

#### **4.4 Integration of the Two Methods in the Analysis**

Andrew, Salmonson and Halcomb point to the growing popularity in the use of mixed methods but note the dearth of descriptions of the practical aspects of mixing qualitative and quantitative data in one study, arguing that the challenge of integrating the two is possibly the greatest complexity in mixed method research (Andrew et al., 2008). Indeed, very little description of this process has been found by the author. As mentioned above (see 4.3.1), Johnson and Onwuegbuzie insist that the *findings* of the different sets of data in a mixed methods research study at some point need to be integrated or mixed, and that when, as in this study, different methods are carried out concurrently, this integration will take part when the findings are interpreted and discussed (Johnson and Onwuegbuzie, 2004). Creswell and Tashakkori, in their suggestions for developing publishable mixed methods manuscripts, say that what is expected is that the conclusions from the two strands of research must be integrated in a way that provides a fuller understanding of the phenomenon under study. (Creswell and Tashakkori, 2007:108). However, the issue

with mixed methods research is the way in which this integration is carried out. Bryman says that these studies must integrate, link, or connect the “strands” in some way and suggests that findings are presented in terms of substantive issues, rather than in terms of the different methods, and that one way of doing this is to consider the findings from both sets of results in terms of themes (Bryman, 2008:676). The focus is then on the main themes that arise in the different sets of data. In this research study, each set of results (gained through quantitative and qualitative methods respectively) was analysed separately initially and then cross-referenced to show connections before being integrated according to which objective they were relevant to.

Analysis of the quantitative data went through four stages: results for each variable were analyzed separately; the variables were then divided into two groups according to whether they more closely addressed the first research question of objective two, or the second; within each of these two groups, the mean scores were used as a way to divide the variables into those that were perceived or rated positively, and those that were perceived or rated negatively; the links, or underlying themes between these sub-groups were then explored. What became apparent was that aspects of the country itself were being rated more highly than aspects of conference provision. The interest in the country was clear – and doubts concerning the country’s potential as an international conference destination were also clear. Also apparent was that the factors rated most negatively were those clearly rooted in the social and political situation in the country.

Analysis of the qualitative data went through three main stages: initially, the data were coded for the two groups of respondents – delegates and officials; then the themes that arose out of the coding were explored in terms of the objectives and research questions; connections between the themes and similarities between what the delegates pointed to and what the officials pointed to were then explored, in terms of the (first) objective. Patterns began to emerge which indicated that much of the data focused on three main areas: an interest in the country on the part of the delegates (as the quantitative data also indicated), gained quantitatively), rather than a great deal of faith in its capacity as an international conference destination; a sense, again on the part of the delegates, that the country was ambivalent about welcoming them, which was confirmed by what the officials said; and an overall picture that the difficulties that were raised were somehow linked to this ambivalence.

It is important to point out that the stages of analysis outlined above for both the quantitative and qualitative data seem very clear cut, whereas in reality, the process was a constant moving backwards and forwards between the two sets of data, and a constant distilling down of the data into comprehensible ‘chunks’ that in some way addressed the research questions of each objective. What became clear during this process was how closely the results from both the quantitative and qualitative data appeared to be indicating similar patterns: interest in the country; a lack of clear faith in its capacity to develop; and some sense that this lack of capacity was rooted in blockages in the social and political situation. Throughout the discussion of the results in chapters five and six, if the results from one method shed some light on, enhance, or have some relationship to the results in the other, then these are cross-referenced and commented on when relevant. However, the final integration of the results, and discussion of how the findings from both the qualitative and quantitative data address the aim of the study, is in chapter seven.

#### **4.5 Conclusion**

The aim and the objectives of this study arose out of an understanding of the KSA’s need to develop alternative sources of income to oil, as population levels soar and unemployment reaches record levels at the same time as peak oil becomes a serious concern. The aim of the study is therefore based in the concrete situation of the KSA looking to develop industry that would create new sources of revenue and employment – in this case, the international meetings industry - and of it joining the World Trade Organisation, and opening up the Kingdom to the outside world, as a way of doing this.

In order to assess the potential of Saudi Arabia to become an international conference destination, two different perspectives and sources of information were sought; that of officials involved in the industry and that of delegates experiencing conferences held there. These external and internal perspectives add breadth and depth to the exploration, as does the inclusion of the perspectives of delegates and officials in the UAE against which to offset them.

The methods used to collect and analyse the data were mixed and both methods were subjected to tests of reliability (of the quantitative data collection and analysis, see 4.3.3.2) and trustworthiness (of the qualitative data collection and analysis, see 4.3.4.6).

Although the interviews and the questionnaire were designed to meet objectives one and two, respectively, each method also contributed information and perspectives which helped to more fully meet the other objective. More importantly, however, it was only with the integration of the two sets of results, that it was possible to fully address the aim of the study. Not only did the mixing of methods allow for the strengths of each to be added to the other, and the weaknesses of each to be compensated for by the strengths of the other, it, crucially, allowed the author to use one set of data to build on the other and to create a more comprehensive picture of Saudi Arabia's current capacity and of its potential to become an international conference destination.

The difficulties experienced in the process of carrying out the research - the limited numbers of participants at the official level, the lack of available documentation on the industry, the lack of previous research into the field, and the lack of support and freedom for a female researcher to carry out the study, resulting in, for one thing, small sample sizes - to some extent call into question the quality of the data. Interestingly, however, on another level, these difficulties can be seen to be symbolic of some of the factors at play in the KSA which would hinder the development of the industry. In this sense, they add credibility to the findings of the study.

In the following three chapters, the data gathered are analysed and discussed. Chapter five considers the data gathered through the questionnaire; chapter six analyses and interprets the data gathered through the interviews with delegates and officials; and, finally, chapter seven integrates the results from these two strands of the research and discusses them in relation to the objectives of the study.

## CHAPTER FIVE

## THE CAPACITY OF SAUDI ARABIA TO HOST INTERNATIONAL CONFERENCES

**5.1 Introduction**

The aim of this chapter is to specifically address the first objective of the study through an exploration of survey participants' perceptions of Saudi Arabia's capacity to be an international conference destination. It assesses both their perceptions of practical strengths and weaknesses in international conference provision (research question 1.i) and their views of the country's overall capacity, taking into account the whole experience of attending conferences in that location (research question 1.ii). Where data arises that is relevant to socio-political factors that may impact on the feasibility of the KSA being host to international conferences (see objective 2), then this will be briefly commented on and linked to future discussion in chapter six. Throughout the chapter, analysis of the data on the UAE will be incorporated; emphasis will be placed on data that sheds light on those aspects of Saudi Arabia which might support its success in this industry, and those aspects which might pose a barrier to it.

The data was gained from a questionnaire (see Appendix A) given to survey participants in the two different locations. As stated in chapter four, this exploration is based on analysis of data gained only from attendees at the conferences and not data gained from officials. The chapter is divided into three sections. The first two lay the basis for the exploration of the data in the third part by providing a picture of the survey participants: demographic information is presented in the first section; and an account of their experience and understanding of international and Middle East conferences and of the characteristics of international destinations that they value is presented in the second. The purpose of this is to illuminate not only the extent to which previous experience might inform and enhance participants' responses, but also to shed light on possible 'pull factors' to Middle East destinations which might be shared by Saudi Arabia and which therefore may indicate a potential for the kingdom to develop this industry. The third

section is when the core data is analysed and the research questions for objective one are specifically addressed.

## 5.2 Profile of Sample Groups

This section describes the demographic profiles of both sample groups, based on the information given in responses to items one to four, as shown in Table 5.1. Significant differences between the two groups will be noted and used, if necessary, in the explanation and interpretation of results in the following sections. The statistics for the Chi-square tests carried out on each item in table 5.1 are shown in Appendix D.

Table 5.1: The Samples

		(KSA)		(UAE)		Asymp. Sig (2-sided)
		Frequency	Percent	Frequency	Percent	
a. Gender	Female	18	25.4	42	48.8	.003
	Male	53	74.6	44	51.2	
	Total	71	100.0	86	100.0	
b. Origin	Middle East	25	35.2	9	10.5	.000
	Non Middle East	46	64.8	77	89.5	
	Total	71	100.0	86	100.0	
c. Region of Origin	Gulf region	10	14.1	0	0	.000
	Middle East	15	21.1	9	10.5	
	Europe	18	25.4	33	38.4	
	Asia	7	9.9	19	22.1	
	America	13	18.3	14	16.3	
	Africa	2	2.8	8	9.3	
	Australia	6	8.5	3	3.5	
	Total	71	100.0	86	100.0	
d. Work	Middle East	25	36.6	12	14.0	.001
	Non Middle East	46	63.4	74	86.0	
	Total	71	100.0	86	100.0	
e. Organization	Public sector	20	28.2	10	11.6	.013
	Private sector	42	59.2	71	82.6	
	Voluntary sector	1	1.4	1	1.2	
	Other	8	11.3	4	4.7	
	Total	71	100.0	86	100.0	

Source: Author, 2009

The overall sample consisted of 157 conference participants, with 71 participants attending conferences in the KSA and 86 attending conferences in the UAE. There were significant differences between the two sample groups in terms not only of gender, but of region of origin and region of work. Table 4.5 and Charts 4.3 and 4.4 in Chapter 4 give a breakdown of the nationalities of survey participants at the conferences in the UAE and the KSA and indicate the wide range of nationalities attending them. However, when considered in the more general term of the participants' origins being Middle Eastern or not, the results showed that the majority of UAE conference participants (89.5%) came from outside the Middle East region, with none coming from the Gulf area (even though a small percentage had their work based there), in contrast with the fact that over a third of participants at the conferences in Saudi Arabia were from the Middle East, of whom a third were from the Gulf. Nevertheless, the work of the largest number of participants in both destinations was based outside the region. No significant difference was found between the types of organisation participants in both groups worked for, with the majority of survey participants working in the private sector. However, a further significant difference between the two groups did concern the gender make-up; whereas the proportion of male to female delegates at the conferences in the UAE was almost equal, in Saudi Arabia the proportion was 3:1. There could be a variety of explanations for the above differences: the fact that there were fewer female attendees at conferences in Saudi Arabia could be accounted for by the restrictions still placed on women in that country; with regard to the greater number of Middle East/Gulf attendees at conferences in the KSA, this could be because Middle East visitors were possibly less likely to be deterred by the marked cultural differences in a country whose society is still very closed to outsiders, as symbolised to some degree by complex visa and entry restrictions; and a final reason could be that the conferences in the UAE were organised by an international organisation and were probably also less well-known to regional participants than those in the KSA, these having been run for only three years (see 4.3.2).

### **5.3 Participants' Experience of International Conferences and of the Middle East**

Items five to fourteen in the questionnaire deal specifically with the sample participants' experiences of conferences generally, and their experiences of the region more specifically. This illuminates not only the extent to which participants' responses are

informed and/or enriched by previous experience, but also sheds light on possible ‘pull factors’ to Middle East destinations which might be shared by Saudi Arabia and which therefore may indicate a potential for the kingdom to develop this industry (see research questions 3.i & 3.ii). This section is divided into three main parts: the first considers participants’ experience of both international conferences and of the Middle East; the second part analyses any experience participants have had of the KSA and the UAE particularly, and the purposes of any previous visits to these destinations; the third provides a brief consideration of how participants learnt of the conferences in question and of the length of their stays in the two countries at the time of the conferences.

The majority of respondents in both Saudi Arabia (94.4%) and the UAE (95.4%), as shown in Table 5.2, had had previous experience of international conferences (Appendix E, 5.2a shows the statistical significance of these results). With regard to experience of conferences in the Middle East, the majority of respondents at the KSA conferences (93%) had had previous experience, as opposed to only 64% of respondents at the conferences in the UAE; this is a statistically significant difference (see Appendix E, 5.2b) which might be a result of the larger percentage of respondents in the KSA than in the UAE coming from that region. This previous experience gives the respondents a broader understanding (of international conferences, generally, and conferences in the Middle East, more specifically) on which to evaluate the conferences being studied in this research, thereby enhancing the reliability of their responses. Both groups of respondents had had previous experience of a range of Middle East conference destinations, and in both the KSA and the UAE samples, the location previously visited by the largest percentage of participants (69.7% and 78.2% respectively of those who had previously attended conferences in the region) was the UAE, an already established, internationally respected conference destination. Again, this experience is likely to be used as a benchmark against which their perceptions of the strengths and weaknesses of the destinations will be measured, and this will, in turn, provide more reliable indicators of the potential and capacity of Saudi Arabia to be an international conference destination.

Table 5.2: International and Middle East Conferences Attended

	KSA		UAE	
	Frequency	Percent	Frequency	Percent
Conferences Attended				
Domestic only	4	5.6	4	4.7
Overseas only	36	50.7	36	41.9
Both	31	43.7	46	53.5
First ME Conference				
Yes	5	7.0	31	36.0
No	66	93.0	55	64.0
Location of Conferences Attended in ME				
Saudi	25	37.9	9	16.4
UAE	46	69.7	43	78.2
Oman	12	18.2	2	3.6
Jordan	11	16.7	15	27.3
Egypt	27	40.9	17	30.9
Bahrain	16	24.2	13	23.6
Other	18	27.3	11	20.0
Favourite ME Location				
Saudi	13	18.3	3	3.5
UAE	30	42.3	45	52.3
Oman	7	9.9	7	8.1
Jordan	2	2.8	8	9.3
Egypt	8	11.3	10	11.6
Other	11	15.5	13	15.1
Reasons for Favourite ME Location				
Price	7	5.1	7	4.4
Exclusive	19	13.9	28	17.7
Atmosphere	43	31.4	54	34.2
Lack of hassle	29	21.2	21	13.3
Location	30	21.9	39	24.7
Other	9	6.6	9	5.7

Source: Author, 2009

Respondents were asked to state which Middle East destination they most favoured, as a stepping stone for gaining information on what they perceived to be important pull factors of destinations in the region. This would help to form an initial impression of what respondents found attractive about Middle East conference destinations – and, by extension, provide information against which to evaluate the KSA; does the KSA also have those pull factors and might they add to its potential to develop this industry? With regard to respondents' choice of favourite conference destination in the Middle East, the data from both samples was analysed together in order to gain an overall picture. By far the most favoured destination was the UAE, with 48% of all participants choosing them; the second and third most favoured were Egypt (with 11.5%) and Saudi Arabia (with 10.2%), indicating that the kingdom was already perceived by some to be an attractive destination. This is borne out by the results for the following question.

Respondents were given the choice of five reasons why they had chosen those particular Middle East destinations, or invited to give their own. They were asked to indicate two reasons. The results are shown in Table 5.2. As with the previous item, the data from both sample sets was analysed together in order to gain an overview of what qualities the different locations were perceived by all respondents to offer and whether different destinations were perceived to have different pull factors. The main reasons given by respondents for their choice of favourite Middle East conference destinations generally were ‘atmosphere’, ‘location’, ‘lack of hassle’ and ‘exclusivity’. ‘Atmosphere’ and ‘location’ were the two most important reasons given by all respondents. The implication for this study is that the KSA shares similar characteristics to those perceived to be the pull factors of the UAE, an already established international conference destination.

It was considered that, to some extent, previous experience in any capacity of the two destinations which are the focus of this study would enrich the responses participants would give regarding their experiences of the conferences there; participants would have a greater understanding of the places to draw on. Differences between the results for the KSA and the UAE were not statistically significant (see Appendix E, 5.2c) in terms of the amount of previous experience participants at the conferences in the two places had had. As is shown in Table 5.3 below, almost two thirds of the sample in the KSA (62%) had previously visited the kingdom, with 30% having previously visited either once or twice. One strength of there being more than a third of the respondents in the KSA with *no* previous experience of the country could be that the data is based on a mixture of both first impressions and more informed impressions. Those participants who had had previous experience of the countries were asked to indicate any number of purposes for their visits that applied to them, as a way of ascertaining what the main reasons were for people visiting (see Table 5.3). No respondent ticked more than two. The main reason given for previous visits to the KSA and the UAE was ‘business’, with 68.9% and 72.1% of respondents from the two countries respectively, choosing this. The second most popular purpose for prior visits, again in both countries, was for a conference: 37.8% of KSA respondents gave this reason, as compared with 50.8% of UAE respondents. A larger number of respondents in the UAE chose ‘holiday’ as their reason for visiting (21.3%) than in the KSA (only 8.9%). Clearly, the main reason most of the participants in both countries had previously visited the destinations was connected to work, indicating some potential for the KSA to develop this particular type of industry.

Table 5.3: Previous Experience of the KSA and the UAE

	KSA respondents		UAE respondents	
	Frequency	Percent	Frequency	Percent
No. of Previous Visits to Current Location				
0	27	38.0	25	29.1
1	8	11.3	11	12.8
2	14	19.7	14	16.3
3	5	7.0	11	12.8
4	3	4.2	6	7.0
5	1	1.4	7	8.1
6-10	9	12.7	5	5.8
Over 10	4	5.6	7	8.1
Purpose of Previous Visit(s) to Current Location				
Holiday	4	5.6	13	15.1
Business	31	43.7	44	51.2
Conference	17	23.9	31	36.0
VFR	3	4.2	0	0.0
Other	6	8.5	0	0.0
Missing	26	36.6	25	29.1

Source: Author, 2009

Respondents' actual experiences of, and perceptions of, the conferences being studied will be considered in far greater detail in the following section (5.4). Before this, data gathered on how respondents learnt about the current conferences and the length of their stays will be analysed.

With regard to the source of information regarding the conferences attended in the two locations, Table 5.4 shows that more than half of the respondents in Saudi Arabia learnt about the conferences from colleagues and friends (40.8% and 14.1% respectively), whereas, with regard to the UAE, respondents learnt about the conferences from a wider range of sources, with the largest number learning about them through other exhibitions. The percentage of UAE respondents who said they had learnt about the conferences through the media was 14%, as opposed to only 1.4% in the KSA. The source of information of almost half the UAE respondents therefore, was exhibitions and the media, with the organizers adding an extra 11.6%; this is indicative of the level of marketing of conferences carried out by the UAE and/or by the organizers, and of the established nature of the industry in that country, which is not indicated by the findings for the KSA. There is a statistically significant difference in how information regarding the conferences is disseminated (see Appendix E, 5.2e). Although conference destinations differ from leisure tourism destinations in many ways, there are still many similarities between them, particularly with regard to how they are marketed and how they attract people. If it is true that 'tourism is an information intensive industry' (Pan & Fesenmaier, 2006:809), it is

necessary to identify major sources of information and the type of information being disseminated. Overall, it seems as though the KSA has not yet developed coherent systems for marketing and promoting itself, which suggests a lack of commitment to developing the industry at the time of this study.

Table 5.4: Length of Stay and Source of Information: the KSA and the UAE

	KSA		UAE	
	Frequency	Percent	Frequency	Percent
Combined Length of Stay in Days				
1-5	52	73.2	62	72.1
6-10	13	18.3	21	24.4
11-15	4	5.6	2	2.3
16-20	1	1.4	1	1.2
Other	1	1.4	0	0
Total	71	100	86	100
Source of Information				
Friends	10	14.1	5	5.8
Media	1	1.4	12	14.0
Colleagues	29	40.8	15	17.4
Internet	16	22.5	9	10.5
Exhibition	0	0	27	31.4
Organization	5	7.0	10	11.6
Other	10	14.1	8	9.3
Total	71	100	86	100

Source: Author, 2009

As a way to understand whether there was a tendency for participants at these destinations to extend their stays or not – indicating whether aspects other than the conference were attracting them - survey participants were asked to give the total length of their stay at the destination where the current conferences were being held. As is shown in Table 5.4, almost three quarters of participants in the KSA and the UAE did not extend their stays (73.2% and 72.1% respectively). With regard to longer stays, 8.45% of survey participants in the KSA stayed for longer than ten days as opposed to 3.5% of participants in the UAE. Appendix E, 5.2d shows the statistical significance of any differences between the two locations. The length of stay was cross-tabulated with the region of origin (see Appendix E, 5.2f) and it was found that, of the six people in the KSA extending their stay beyond ten days, all of them were from outside the Middle East region and of the 3 UAE participants, two were from the Middle East. The reasons for these extended stays are not clear but they are an indication, particularly in Saudi Arabia, that stays can be, and are being, extended, despite the restrictions still being placed on foreign visitors. It is possible, however, considering the fact that the KSA is opening up to international investment and partnerships in business (see chapter one), and that it is still

relatively closed to international leisure tourism, that their stays were connected to doing business.

Taking into account participants' experiences of international conferences, including those in the Middle East, and of their experience of the KSA and the UAE, the following section focuses on how the research participants viewed their experience of the conferences being focused on in this study and their perceptions of and attitudes towards the two countries as international conference destinations.

#### **5.4 Perceptions and Attitudes**

The bulk of the data on delegate perceptions of what is positive and negative about current provision of international conferences in Saudi Arabia and delegates' attitudes towards its capacity to be an international destination (see research questions 1.i & 1.ii) came from responses to questions, 15, 16, 17, 18 and 19. The aim of question 15 was to investigate the extent of the influence of a range of factors in survey respondents' choice of the conference location. Respondents were invited to say whether the factor had influenced them positively or negatively, and to indicate whether the influence had been strong. The score on each item was a scale from 1 to 5, with 1 indicating a 'strongly negative influence' and 5, a 'strongly positive influence'. Question 17 required respondents to indicate the level of their agreement or their disagreement with 15 statements about the conference venue and the host country. The data was entered on a scale of one to five, with 'strongly agree' coded 1, and 'strongly disagree' coded 5. Question 18 asked respondents to evaluate their perceptions of their present location (as a country to visit and as a conference destination) and the conference itself, using an evaluation scale with points from 1 to 5, with 'very bad' coded 1, and 'very good' coded 5. With each of these scaled questions, coding and labels were reversed on all items in order that all high scores were representative of positive responses and all low scores representative of negative responses. Question 19 was an open-ended question where respondents were asked what they perceived as being the main problems with attending conferences in their location; because the question was open-ended, it was hoped that the responses would provide a more 'honest and personal' (Cohen et al., 2007: 330) account of respondents' views than the previous, fixed response questions, as respondents could express their own views and were not constrained by the pre-selected choice of issues. Answers were coded and analysed qualitatively.

This section is divided into three parts. The first one explores the data through a factor analysis. The factor analysis is carried out on the results for questions 15, 17 and 18. Research questions 1.ii (How is the KSA's capacity to be an international conference destination perceived?) and 3.ii (How is the UAE's capacity to be an international conference destination perceived?) are to some extent addressed by the factor analysis. The second part is concerned with analysis of those items from the questionnaire (specifically from questions 17 and 18) that are concerned with perceptions of the macro capacity of Saudi Arabia as an international conference destination. Analysis of this data is concerned with addressing objective 1, research question ii: How is the KSA's capacity to be an international conference destination perceived? Finally, the third part analyses items which represent the practical, tangible factors connected to international conference provision (items from questions 15, 16, 17 and 18). This part addresses objective 1, research question i: What is perceived as being positive and negative about current provision of international conferences in the KSA? At the end of each of the latter two divisions, the results from question 19, where relevant, will be integrated. Throughout the analysis, data gained on the UAE will be integrated when it is relevant, that is, when it serves to illuminate those factors that might support or inhibit the capacity of Saudi Arabia to develop the industry (see 3.i & 3.ii).

Analysis was carried out through factor analysis, means scores, percentages and standard deviation scores for each location. In order that any differences between the two locations (or between two variables) could be determined, the mean scores for delegates from each location were compared and subjected to either a Mann-Whitney U Test or a t-test of statistical significance.

#### **5.4.1 Factor Analysis**

In this section a factor analysis of the perception, opinion and attitude items is carried out to group together items on which responses tend to correlate. This reveals the underlying structure of the set of variables and reduces the large number of variables to a smaller more manageable number. Items are grouped according to topics to provide a different perspective. The 30 items in questions 15 (excluding 15g, gender segregation), 17 and 18 were reduced to a smaller, more manageable number in an attempt to identify a small set of factors that represents the underlying relationship among them. Tinsely and Tinsely point to the different purposes factor analysis can be used for, one of which is in order to

explore the data (rather than generalize out from the sample to the whole population) (Tinsely and Tinsely, 1987). This factor analysis was used as a tool for exploration of the data; it led to a greater understanding of the fundamental correlations between the variables which guides the subsequent analysis of the discrete items and the groups they were eventually placed in. The factor analysis helps to address research questions 1.i., 1.ii and 3.i: and gives an overall picture of both the KSA and the UAE, before being used as a basis for comparison between the two countries.

With regard to the suitability of the data for factor analysis, Pallant proposes that an ideal overall sample size should be 150 or over (Pallant, 2007). Tabachnick and Fidel suggest that the ratio of subjects to items is more important than overall sample size (with a minimum of five cases for each item being adequate in most cases) (Tabachnick and Fidel, 2007:613). Because factor analysis is not designed to indicate significant differences between two groups (although at a later stage in this analysis, a further technique will be used to look at differences between the UAE and the KSA), it was possible to collate the KSA and UAE samples into one group, thereby making the total sample size 157 and ensuring that the ratio of subjects to items exceeded 5:1. The analysis below shows the tests that were carried out to check for sampling accuracy. This is followed by the results of the factor analysis and a discussion of how it guided the exploration of the data.

Prior to carrying out the factor analysis, two statistical measures generated by SPSS (the Kaiser-Meyer-Olkin (KMO) test, to measure sampling adequacy, and the Bartlett's test of sphericity) were performed to test whether the data and the sample size were adequate for a factor analysis to give stable factors. The results of the Bartlett's test should be significant ( $p < .05$ ) for the factor to be considered appropriate. The KMO index ranges from 0 to 1, with .6 suggested as the minimum value for an effective factor analysis.

Table 5.5: KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.844
Bartlett's Test of Sphericity	Approx. Chi-Square	2312.601
	df	435
	Sig.	.000

Source: Author, 2009

The table above shows that the KMO value is 0.844, a very good value, exceeding as it does the recommended value of .6 (Kaiser 1970, 1974). The Bartlett's test of Sphericity also produces a highly significant result ( $p = 0.000$ ), confirming the appropriateness of factor analysis. Based on this, the factor analysis was run; the results of the analysis are presented in the following tables.

Table 5.6: Total Variance Explained

Component	Total Variance Explained								
	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	8.978	29.928	29.928	8.978	29.928	29.928	6.467	21.556	21.556
2	2.403	8.011	37.939	2.403	8.011	37.939	2.641	8.804	30.360
3	1.952	6.508	44.447	1.952	6.508	44.447	2.256	7.521	37.881
4	1.706	5.687	50.134	1.706	5.687	50.134	2.254	7.515	45.395
5	1.581	5.270	55.404	1.581	5.270	55.404	2.018	6.726	52.122
6	1.425	4.750	60.154	1.425	4.750	60.154	1.876	6.253	58.375
7	1.155	3.851	64.005	1.155	3.851	64.005	1.689	5.630	64.005
8	.949	3.162	67.167						
9	.923	3.077	70.245						
10	.892	2.973	73.218						
11	.820	2.734	75.952						
12	.729	2.431	78.383						
13	.685	2.285	80.668						
14	.651	2.170	82.838						
15	.576	1.919	84.757						
16	.513	1.709	86.466						
17	.474	1.579	88.045						
18	.465	1.549	89.594						
19	.425	1.418	91.012						
20	.390	1.299	92.311						
21	.329	1.097	93.408						
22	.311	1.036	94.444						
23	.284	.946	95.390						
24	.256	.852	96.242						
25	.243	.810	97.052						
26	.221	.736	97.788						
27	.207	.690	98.478						
28	.171	.569	99.048						
29	.148	.492	99.540						
30	.138	.460	100.000						

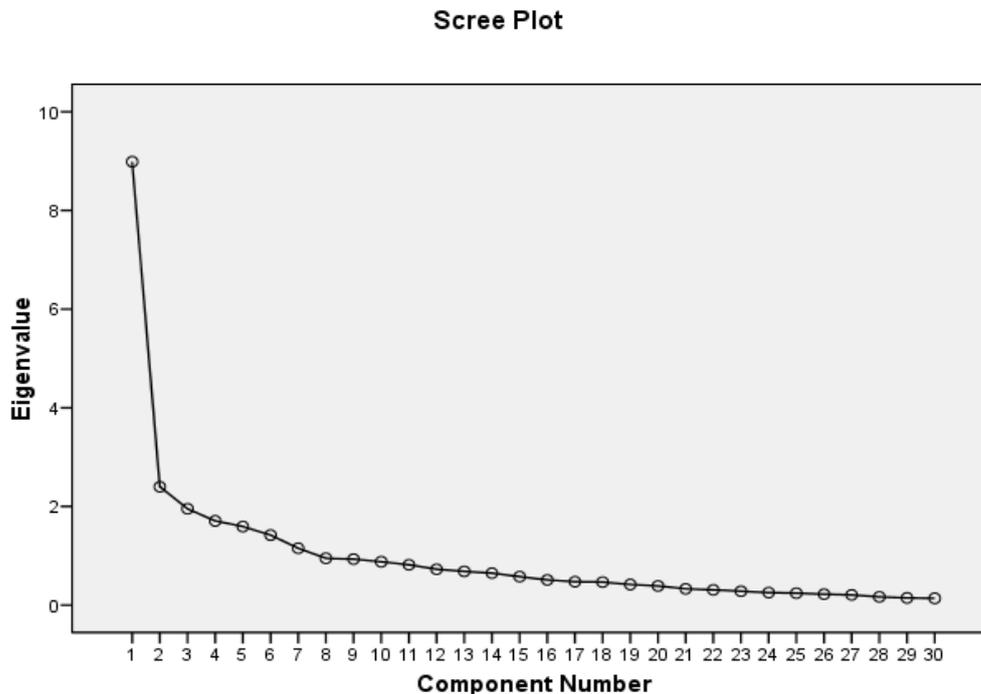
Extraction Method: Principal Component Analysis.

Source: Author, 2009

This table shows that the factor analysis extracted seven components from the 30 items. The first component explained 29.9% of the variance, the second component explained 8.0% of the variance, and subsequent factors explained diminishing proportions of the variance down to component 7, which explained only 3.9% of the variance. All together, the seven components accounted for 64.0% of the variance. In order to confirm these components, a Scree plot was also used (Catell, 1966): in this test, each of the eigenvalues of the factors are plotted and when the curve changes direction, or there is a break in the plot, then only components above this point (which are the ones that contribute most to the explanation in the data set) are retained. The Scree plot below (see figure 5.1) demonstrates that the change in direction starts after component number 8, leaving seven components contributing to the explanation of 64% of the variance. This is in accordance

with the extraction of the seven components in table 5.6 above. In addition, usually only factors with eigenvalues of 1 or more are retained for further investigation: the seven components retained in this factor analysis are those with eigenvalues greater than 1, a criterion recommended by Kaiser which research has indicated is accurate (Kaiser, 1960). Field argues that factor analysis is an exploratory tool and that the researcher should make her own decisions regarding how it is used based on what the analysis unearths, rather than leaving it up to the computer to make them (Field, 2005). He points out that one important decision is the number of factors to extract, and Tabachnik and Fidel recommend that researchers experiment with different numbers of factors in their exploration until they find a satisfactory solution (Tabachnik and Fidel, 2007). Because the factor analysis was carried out in this study as a means to explore the data and see what components arose that might prove useful, rather than, as mentioned above, as a way to test hypotheses, or with the aim of generalizing out the findings to the larger population, it was decided to work with the seven components.

Figure 5.1: Scree Plot of Components



Source: Author, 2009

A varimax (orthogonal) rotation was performed so that the components obtained would be independent of each other (see table 5.7 below for the rotated component matrix). It was decided to suppress loadings of less than 0.4 in order to simplify the reading of the

rotated component matrix; the number of loadings in the matrix was reduced so that most items were seen to load onto only one component. The gender segregation question, 15g, was not included because this question was not presented to the UAE delegates. Table 5.7 below shows the loadings of the 30 items onto the seven components.

Table 5.7: Rotated Component Matrix

Items		Component						
		1	2	3	4	5	6	7
17n	Visit again	.806						
18f	Image after visit	.799						
18e	Visit again	.768						
18b	Recommend	.756						
17h	Recommend destination	.754						
18a	Impression	.738						
17k	I would organise a conference	.654						
17m	myself	.639						
17o	Global leader in 2015	.635						
17c	Global leader in 2025	.549						
17l	Significant niche in the future	.470						
15d	Transport infrastructure		.737					
15i	Availability of information		.727					
15c	Entertainment facilities		.495					
15j	Unvisited before		.465					
17b	Word of mouth			.705				
17i	Visa regulations			.695				
17j	Conference facilities not developed			.644				
15a	Conference tourism underdeveloped			.584				
17a	Obtaining visas				.726			
15f	Safe venue				.684			
18f	Safety				.611			
17d	Practical organization				.585			
17e	Safe country					.806		
18c	Perceptions before attending					.655		
17f	Image before visit					-.693		
15h	Perceptions after attending						.792	
17g	Prices						.790	
15e	Expensive conference location							.755
15b	Its heritage							.599
	Experiencing local culture							

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

Source: Author, 2009

Table 5.8 below shows which items loaded positively ( $> 0.40$ ) into each component. In order to check the reliability of the components, Cronbach's coefficient alpha statistic was used to test the internal consistency of the items in each component. The items in the scale should measure the same underlying attribute (so high scores given to one item are likely to be given to other items in that component, also).

Table 5.8: The Extracted Components

<b>Component 1: Overall Evaluation and Future Prospects</b>	
17c	Conference tourism could become a significant tourism niche in this destination in the future
17h	I would recommend the KSA / the UAE as a conference destination to my friends and colleagues
17k	I would choose this destination to organise a conference in myself/for my organization
17l	Transport infrastructure in this destination is excellent for conference attendees
17m	This destination has the potential to become a global leader in conference by 2015
17n	Because of my experience with this conference I would like to visit again.
17o	This destination will be a global leader in conference by 2025
18a	What is your overall impression of your visit?
18b	Would you recommend the country as a conference destination to your friends, and colleagues?
18d	What image of the country do you have now?
18e	What is your attitude to visiting again?
<b>Component 2: Attraction</b>	
15c	Place unvisited before.
15d	Availability of information
15i	Entertainment facilities
15j	Word of mouth recommendation
<b>Component 3: Bureaucratic Obstacles and Standard Facilities</b>	
15a	Obtaining visas
17d	Visa regulations make attending conferences in this destination difficult.
17i	Conference facilities are not as well developed as other locations in the Middle East.
17j	Conference tourism is underdeveloped
<b>Component 4: Safety</b>	
15f	Safety
17a	The conference venue is safe
17b	This country is a safe place to hold international conferences
18f	The practical organization of the conference
<b>Component 5: Change of Image</b>	
17e	My perceptions of this destination as a conference venue <i>before</i> attending this conference
17f	My perceptions of this destination as a conference venue <i>after</i> attending
18c	This conference has positively changed the image held before the visit
<b>Component 6: Prices</b>	
15h	Price
17g	An expensive conference location
<b>Component 7: Interest in Local Culture</b>	
15b	Experiencing the local culture
15e	Its heritage

Source: Author, 2009

Cronbach's alpha for each component can be seen in table 5.9 below.

Table 5.9: Test for Internal Consistency of Components

<b>Reliability Statistics</b>		
COMPONENTS	Cronbach's Alpha	No. of Items
Component 1: Overall evaluation and future prospects	.916	11
Component 2: Attraction	.638	4
Component 3: Bureaucratic obstacles and standard facilities	.708	4
Component 4: Safety	.661	4
Component 5: Change of image	.002	3
Component 6: Prices	.697	2
Component 7: Interest in local culture	.478	2

Source: Author, 2009

Using George and Mallery's scale for guidance (with a score of  $> .9$  indicating an excellent level of consistency, a score of  $> .8$  indicating a good level,  $> .7$ , an acceptable level,  $> .6$  a questionable level, and  $> .5$  a poor level) (George and Mallery, 2003:231), it can be seen that, apart from component one (with its excellent score of .916) and, to a lesser degree, three (with its acceptable score of .708), all components scored low for internal consistency, with both components 5 and 7 scoring too low to be included.

Interestingly, the component with the excellent score contains items which most directly address the second research question of objective one (focusing on overall perceptions of the country's capacity). The items in this component summarise perceptions of the country overall, as opposed to looking at discrete, practical aspects of conference provision; they ask for general and specific attitudes, views, evaluations of the destination, from attitudes towards revisiting, to views on the potential of the country to be a global leader by two specific dates. This component explained almost 30% of the variance in the factor analysis (see table 5.6). This component will be analysed in more detail below. The remaining six components, on the other hand, are more closely connected to the first research question of objective one (focusing on perceptions of what is negative and positive about current provision of conferences in the KSA). They contain information regarding: what attracts people to the destinations (component 2); constraints created by bureaucratic processes and the standard of facilities (component 3); levels of safety and organisation (component 4); pre- and post-visit perceptions (component 5); price (component 6); and interest in local culture (component 7). Closer analysis of the items in these components indicated that the connections between them were somewhat illogical and unhelpful. In the fourth component, for example, the 'practical organization' of the conferences seemed to have little relevance to the items on 'safety'. Similarly, in component three, it was difficult to see a connection between the two items on visa and

the ones on conference facilities and the state of development of tourism generally. The fact that the items in the two excluded components (perceptions of the destinations and the influence of the culture and heritage) were seen as being vital to the analysis also called into question the suitability of basing an analysis on these components, particularly in light of the relevance of these items to the discussion in chapter six.

This observation was mirrored by the results of the reliability test. Components five and seven were excluded as their reliability scores were below .6 (<.6). That three of the remaining four components (numbers two, four and six) were between .6 and .7 (that is between being questionable and acceptable) left only one component (the third) that tested satisfactorily for internal consistency. For this reason, it was decided that all components except for the first should be excluded. Despite them being excluded, however, they served a very useful purpose as initial categorisations and pointed the way to how the analysis of the data needed to focus separately, firstly, on positive and negative factors relating to the practical provision of conferences (research question 2.i and 3.i) and, secondly, on positive and negative attitudes and views of the countries' overall capacity to be international conference destinations (research questions 2.ii and 3.ii)).

At this stage, it was decided to compare the score for component one in the KSA with the score for component one in the UAE, to see whether overall perceptions of the destinations and their future prospects were similar or not. The Kolmogorov-Smirnov test was run to check for normality of distribution to indicate which test of comparison would be most suitable: parametric or non-parametric. Results can be seen in table 5.10 below. The test shows that the significance is greater than .05 and therefore the distribution is normal and a parametric test (in this case, a t-test) is suitable.

Table 5.10: Normality Test for Component 1

	Kolmogorov-Smirnov(a)			Shapiro-Wilk		
	Statistic	df	Sig.	Statistic	df	Sig.
<b>Factor 1</b> Overall evaluation and future prospects	.054	157	.200(*)	.984	157	.061

\* This is a lower band of the true significance.

A Lilliefors Significance Correction

Source: Author, 2009

Table 5.11 below shows the mean and standard deviation scores gained from the t-test.

Table 5.11: Component 1: Means and Standard Deviation

	Location	Mean	Std. Deviation	Std. Error Mean
Component 1: Overall evaluation and future prospects	KSA	3.4302	.58995	.07001
	UAE	4.1047	.45987	.04959

Source: Author, 2009

There was a significant difference in scores for the KSA ( $M = 3.43$ ;  $SD = .589$ ) and the UAE ( $M = 4.10$ ;  $SD = .459$ ); table 5.12 below indicates that the difference between the two is statistically significant at .000. This indicates a greater faith in the UAE's current capacity overall and in their future prospects.

Table 5.12: T-test (Independent Sample) for Component 1

		Independent Samples Test									
		Levene's Test for Equality of Variances		t-test for Equality of Means						95% Confidence Interval of the Difference	
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper	
Factor 1 Overall evaluation and future prospects	Equal variances assumed	1.746	.188	-8.048	155	.000	-.67443	.08381	-.83998	-.50889	
	Equal variances not assumed			-7.861	130.749	.000	-.67443	.08580	-.84416	-.50470	

Source: Author, 2009

Tests for statistical significance were also carried out on the remaining components; Appendix F shows the results of these tests.

Multivariate analysis of the data guided the analysis of the quantitative data to a large extent by clarifying how the items in the questionnaire could be roughly divided into two groups: those that elicited perceptions of, and views on, the macro capacity for international tourism to be developed, and those that were concerned with discrete practical factors. This division corresponded with the two research questions connected to the main objective (objective 1) of the quantitative data: to assess the capacity of Saudi Arabia to host international conferences. The second research question - How is the

KSA's capacity to be an international conference destination perceived? – was addressed largely by those items concerned to gather views and attitudes on the macro capacity of the kingdom. All items in Component 1 from the factor analysis (concerned with overall evaluation of the destinations and perceptions of their future capacity) were included in this analysis, apart from item 17l, which focuses on the standard of transport infrastructure, a separate, concrete factor which was considered to be more relevant to the second group, which focuses on negative and positive aspects of the practical provision of conferences. Four items were also added to those in Component 1: 17 e (My perceptions of this country as a conference venue *before* attending this conference were poor); 17f (My perceptions of this country as a conference venue *after* attending this conference have positively changed); 17j (Conference tourism in this country is underdeveloped); and 18 c (Image before visit). These were added because they were concerned with the appraisal of abstract factors (image / the *general* standard of conference tourism) rather than concrete ones. All other items were included in the second group and were relevant to the first research question of objective 1: What is perceived as being positive / negative about current provision of international conferences in the KSA? Tables 5.13a and 5.15a below show the items in each group. The analysis of the data from this point on will be structured around this grouping. It will begin with analysis and discussion of data relevant to the second research question of objective 1 and will then focus on data relevant to the first research question. In both parts, data on the UAE will be included when it illuminates a particular factor relevant to the overall potential of Saudi Arabia to be an international conference destination, or when the results on what is perceived to be positive / negative about current provision of conferences in the UAE serves to form an interesting point of comparison or contrast. With both parts of the analysis, the discussion will be structured around what the results show to be positive, neutral or negative about the factors themselves, or the views of the participants.

### 5.4.2 Macro Capacity

Table 5.13a below shows the items included in this section which are relevant to the overall view of the capacity of Saudi Arabia to be an international conference destination.

Table 5.13a: Macro Capacity: Responses to Statements on the KSA

(KSA) Items		Frequency / Percentages										Mean	S.D.
		n	%	n	%	n	%	n	%	n	%		
Question 17		Strongly Agree		Agree		Neither Agree Nor Disagree		Disagree		Strongly Disagree			
17c	Conference tourism could become a significant tourism niche in the future.	7	9.9	41	57.7	18	25.4	5	7.0	0	0	3.70	.744
17e	My perceptions of this country as a conference venue <i>before</i> attending this conference were poor.	3	4.2	15	21.1	31	43.7	20	28.2	2	2.8	3.04	.885
17f	My perceptions of this country as a conference venue <i>after</i> attending this conference have positively changed.	6	8.5	35	49.3	27	38.0	3	4.2	0	0	3.62	.704
17h	I would recommend this country as a conference destination to my friends and colleagues.	5	7.0	32	45.1	24	33.8	9	12.7	1	1.4	3.44	.857
17j	Conference tourism in this country is underdeveloped.	3	4.2	26	36.6	12	16.9	28	39.4	2	2.8	3.00	1.028
17k	This country is a destination I would choose to organise a conference in myself/for my organization	3	4.2	17	23.9	31	43.7	19	26.8	1	1.4	3.03	.861
17m	This country has the potential to become a global leader in conferences by 2015.	4	5.6	9	12.7	24	33.8	32	45.1	2	2.8	2.73	.925
17n	Because of my experience with this conference, I would like to visit this country again.	7	9.9	44	62.0	17	23.9	3	4.2	0	0	3.77	.680
17o	This country will be a global leader in conferences by 2025	7	9.9	21	29.6	30	42.3	12	16.9	1	1.4	3.30	.916
Question 18		1 Very bad		2		3		4		5 Very good		Mean	S.D.
18a	Overall impression	0	0	2	2.8	7	9.9	47	66.2	15	21.1	4.06	.652
18b	Recommend as conf. destination	0	0	9	12.7	26	36.6	29	40.8	7	9.9	3.48	.843
18c	Image before visit	3	4.2	14	19.7	32	45.1	16	22.5	6	8.5	3.11	.964
18d	Image after visit	0	0	2	2.8	15	21.1	43	60.6	11	15.5	3.89	.688
18e	Attitude to visiting again	0	0	5	7.0	9	12.7	39	54.9	18	25.4	3.99	.819

Source: Author, 2009

Based on the mean scores (with scores around 2.60 to 3.40 indicating a neutral attitude or view, those over 3.40 indicating a positive trend in attitudes or views, and those under 2.60 indicating a negative trend in attitudes or views), it can be seen that there was a

generally positive response (with a mean score of 3.70) to conference tourism becoming a significant tourism niche in the future in Saudi Arabia (see item 17c); almost 70% (67.6%) agreed that it could be (with almost 10% strongly agreeing with this). This is despite the completely neutral mean score of 3.0 for the statement (17j) that conference tourism in the KSA was underdeveloped. The discrepancy here could be explained by the difference in time focus in the two statements, with the former considering the future of conference tourism and the latter focusing on the current state of development.

The view that the state of development of conference tourism was neither positive nor negative (with almost equal percentages of participants, around 40%, agreeing and disagreeing that it was underdeveloped) did not seem to negatively affect their image of the country. There is a very clear shift towards the positive in perceptions (see 17e and 17f) and image (see 18c and 18d) of the destination from before the conferences (neutral) to after the conferences (positive). Percentage scores demonstrate the change more clearly: responses to statement 17f indicated that almost 60% had more positive perceptions of the country as a conference venue after their visit, and, in response to statements 18c and d, an extra 46% (bringing the total to over 76%) said their image was good after the conference and 19% fewer respondents (only 2.8%) said it was bad. It has been argued that the image held of a destination, and its reputation, are of enormous importance in decisions to attend conferences there; Zelinsky argues that whether the perceptions of a destination are subconscious or not, they have a 'distinct impact' on its success (see 3.3.1) (Zelinsky, 1994 cf. Bradley, Hall and Harrison, 2002), and Bradley et al say that negative image can act as a considerable 'push factor' (Bradley et al., 2002:37). The fact that images and perceptions of the KSA are negative or neutral *before* participants had the opportunity to experience the destination first-hand corresponds very closely with views on the image of the country given by interviewed delegates (see 6.3.1), who also reported a switch from negative to positive images, and by interviewed officials working in the industry in the KSA (see 6.2), who pointed to the lack of marketing of the country.

The shift in overall image of the destination could account for the high mean score (4.06) given to the participants' overall impression of their visit to the KSA; over 87% of

participants indicated that their overall impression was good or very good. This good overall impression of their visit might, in turn, explain the positive responses to revisiting the country (see 17n, which shows 71.9% of respondents indicating that they would like to visit the country again as a result of their experiences of the conferences, and 18e, showing that 80% have a good or very good attitude to revisiting).

However, participants were not unambiguously positive about recommending the country as a conference destination to friends and colleagues, with just over half the respondents saying they would recommend it - in responses to statements 17h and 18b - but over a third remaining neutral. There is a suggestion here that participants' positive attitudes towards, and perceptions of, the country may be more closely based on their overall experiences there (that is, of the country as well as of the conferences) than they are on their perceptions of the standard of conference provision. The more negative stance on conference provision, as opposed to the total experience, seems to be further borne out by the almost totally neutral attitude towards organising a conference there themselves, with equal numbers saying they would as wouldn't (around 28%), yet most participants choosing to remain neutral (around 44%). As far as the development of the industry is concerned, this attitude towards the country as an international conference destination could prove problematic. As mentioned in chapter three, for a city to succeed as a conference destination, it needs to actively develop and promote an image and one of the main sources of information is 'the opinion of others' (Govers et al., 2007) According to Gremler (1994), word-of-mouth seems to be the main information source that is used by future consumers. What is interesting about word-of-mouth is how positively effective it is; Reichheld & Sasser found that it was 700% more effective than newspaper or magazine advertising, 400% more effective than personal selling and 200% more effective than radio advertising in getting consumers to change brands (Reichheld and Sasser, 1990). Their findings also indicated that those satisfied with a service were known to tell 5 people while those dissatisfied were known to tell 11 people.

Two very direct – and time-bound - assertions about the potential of Saudi Arabia to be a leading international conference destination (see 17m and 17o) elicited neutral overall responses. The response from participants regarding the country's capacity to do this by 2015 (7 years after this survey was undertaken) was only just in the neutral band at 2.73,

indicating more of a negative trend, and the response to its capacity to do so by 2025 (17 years after the study), was clearly neutral at 3.30, although only just over 18% of participants disagreed with this assertion, with over 40% remaining neutral and almost 40% agreeing. To some extent, these statements mirror the research question this section is based on (How is the KSA's capacity to be an international conference destination perceived?): although there is greater long-term confidence, the percentage agreeing is not so high as to indicate unequivocally positive beliefs in the KSA's future potential as a global conference destination.

When the data on the KSA is considered alongside that on the UAE (see table 5.13b in Appendix G for the breakdown of results on the UAE), the fact that the results on the UAE are consistently more positive than those on the KSA brings into play a slightly different perspective on attitudes towards and views on Saudi Arabia as an international conference destination. Without the benchmark of the figures on the UAE, the results on the KSA seem to tend towards the positive, whereas the comparison indicates significant differences between the two countries, and shows that the trends in attitudes and views on the UAE are far more positive, despite the fact that it is only a newly emerging international conference destination. The Mann-Whitney U Test (see 4.3.3.6) was used to evaluate the significance of any differences between the two locations. Table 5.14 below shows the results of these tests.

Whereas there was a range of mean scores for the items with regard to the KSA, which necessitated interpretations to be made regarding, for example, why respondents would not organise a conference there despite their overall impression being high, there was far less of a range in the mean scores for the UAE. This indicates greater consistency and clearer links between cause and effect: if, for example, they would recommend the destination to others, it seems logical that their overall impression of it is good.

Table 5.14 Macro Capacity: Statistical Differences between the KSA and the UAE

(KSA) Items		KSA		UAE		Statistics	
		Median	Mean Rank	Median	Mean Rank	z	p
Question 17							
17c	Conference tourism could become a significant tourism niche in the future.	4.00	61.52	4.00	93.43	-4.911	.000
17e	My perceptions of this country as a conference venue <i>before</i> attending this conference were poor.	3.00	71.20	3.00	85.44	-2.056	.040
17f	My perceptions of this country as a conference venue <i>after</i> attending this conference have positively changed.	4.00	75.01	4.00	82.29	-1.073	.283
17h	I would recommend this country as a conference destination to my friends and colleagues.	4.00	60.56	4.00	94.23	-5.207	.000
17j	Conference tourism in this country is underdeveloped.	3.00	73.26	3.00	83.74	-1.515	.130
17k	This country is a destination I would choose to organise a conference in myself/for my organization	3.00	54.87	4.00	98.92	-6.462	.000
17m	This country has the potential to become a global leader in conferences by 2015.	3.00	51.04	4.00	102.08	-7.255	.000
17n	Because of my experience with this conference, I would like to visit this country again.	4.00	62.42	4.00	92.69	-4.665	.000
17o	This country will be a global leader in conferences by 2025	3.00	59.94	4.00	94.73	-5.012	.000
Question 18		Median	Mean Rank	Median	Mean Rank	Z	p
18a	Overall impression	4.00	68.27	4.00	87.86	-3.027	.002
18b	Recommend as conf. destination	4.00	56.77	4.00	97.35	-5.961	.000
18c	Image before visit	3.00	64.03	4.00	91.36	-3.996	.000
18d	Image after visit	4.00	66.61	4.00	89.23	-3.458	.001
18e	Attitude to visiting again	4.00	68.63	4.00	87.56	-2.864	.004

Source: Author, 2009

Overall impressions of the UAE (item 18a) had a high mean score of 4.37 (with over 90% of respondents rating it as good, 45% of these as very good). There is a statistically significant difference between the scores for the UAE and those for the KSA on this item ( $z = -.027$ ,  $p=.002$ ). There is a clear connection between this overall impression of the country and three other factors: whether respondents believed that conference tourism would be a significant niche in the UAE in the future (93% said they did, with 36% strongly agreeing that it would); whether participants perceived that the country would be a global leader in conferences by 2015; and whether they perceived it would be a global leader by 2025. The two latter items both scored highly, and there was very little difference between the scores for 2015 (with over 75% agreeing it would be a global leader, and almost 28% strongly agreeing, four times the number of respondents from the

KSA agreeing) and 2025 (with almost 77% agreeing, 31% strongly, almost double the number of KSA respondents). Statistically significant differences between the scores for the UAE and those for the KSA were found for each of these three items ( $z = -4.911$  and  $p = .000$ ;  $z = -7.255$  and  $p = .000$ ; and  $z = -5.012$  and  $p = .000$ , respectively), despite the KSA having a high mean score for the first.

Results from question 19 that were relevant to the macro factors discussed in this part were those that commented on problems created by image. As far as negative image was concerned, the comments of the respondents in the KSA and the UAE related to perceptions of the Middle East as a region rather than to any particular country. An Australian saw 'misperceptions about the region in terms of security' as being a problem while a British delegate believed that 'selling the Middle East as a destination to certain UK clients due to perceptions' was a major problem. Similar comments are made in the interviews and discussed in more detail in the following chapter (see 6.3.1).

Whereas in the KSA, there was a lack of consistency between, on the one hand, their overall impression and, on the other, whether they would recommend the destination to friends and colleagues and their desire to organise a conference there, in the UAE, there was no sign of such inconsistency. Their very positive overall impression was borne out by positive responses to visiting again, towards recommending the country and towards organising conferences there themselves. With regard to visiting again, almost 92% responded positively to both questions 17n and 18e. As far as recommending the country as a conference destination to friends and colleagues was concerned, responses here were also positive, with almost 90% and just over 90% saying they would in responses to statements 17h and 18b respectively; the percentage response to 17h was greater than the total percentage of respondents in the KSA who said they would recommend that destination together with the percentage who remained neutral. Finally, and in direct contrast with the KSA, almost 79% said they would organise a conference in the UAE themselves (as opposed to only about 28% in Saudi Arabia). Again, statistically significant differences in scores for the UAE and the KSA are indicated for all five latter items (17n,  $z = -4.665$ ,  $p = .000$ ; 18e,  $z = -2.864$ ,  $p = .004$ ; 17h,  $z = -5.207$ ,  $p = .000$ ; 18b,  $z = -5.961$ ,  $p = .000$ ; 17k,  $z = -6.462$ ,  $p = .000$ ). One of the lower mean scores from respondents in the UAE (3.35) was for their perceptions of the destinations *prior* to attending the conferences; more than half the respondents remained neutral or indicated that their

previous perceptions had been poor. This result seems to be consistent with what delegates at the UAE conferences said in their interviews (see 6.3.1); that they are concerned that the image people may have of the UAE before visiting the country may be negatively influenced by the image formed of the rest of the Muslim world by mass media. This view also seems to be borne out by the percentage of participants who said their perceptions improved after attending the conference (64%) (item 17f) and by the almost 30% increase in the number of participants who rated their image of the place as good or very good after their visit (item 18d) from 60.5% before to almost 90% after.

Surprisingly, in light of the consistently high scores for all items associated with the macro capacity of the UAE, only one item had a neutral mean score of 3.27 - 17j ('conference tourism in this country is underdeveloped'), a mean score that did not differ statistically significantly from that of the KSA ( $z = -1.515$ ,  $p = .130$ ). Clearly, despite the perception of respondents in the UAE that the industry is underdeveloped, this did not affect their overall positive attitudes towards the potential they perceive the country has and their very pronounced belief in its future prospects (as can be seen in comparisons with the KSA with regard to practical capacity, which are discussed in the following section).

### **5.4.3 Practical Capacity**

The focus of this part switches from the macro capacity of Saudi Arabia to become an international conference destination and turns to a consideration of the more practical, tangible factors which indicate the extent of its capacity to do this. As mentioned above (in 5.9), this section mainly addresses the first research question of the first objective: What is perceived as being positive and negative about current provision of international conferences in the KSA? It also, to some extent, addresses the second research question of the second objective: What socio-political factors arise in the views and perceptions of international delegates at conferences in the KSA? With regard to the results that are pertinent to this second objective, these are pointed to only briefly here and will be discussed in greater detail in chapters six and seven.

This part of the chapter will analyse the results of the data according to whether the factors are perceived positively, negatively, or neither positively nor negatively. The mean scores for each of the items were used to decide whether the factors in this section were perceived as negative or positive. In this part, results from question 16 will also be included. The analysis will begin with a consideration of the positive factors, which are mainly concerned with issues of safety and with cultural and country factors connected to the wider conference experience. Factors which gained neither positive nor negative scores will then be considered; these seem to be factors that would score highly in more established international conference destinations, as will be discussed. Finally, the very precise and tangible negative factors will be explored and a connection made between these and the wider socio-political context. Throughout the analysis, where relevant, results from the data gained in the UAE will be incorporated and discussed; table 5.18 at the end of this section shows the statistical significance of any differences between the two countries in terms of practical and tangible factors related to their capacity to host international conferences.

Table 5.15a below shows the items included in this section which are relevant to what is perceived to be negative and positive about the capacity of Saudi Arabia to be an international conference destination. Table 5.15b in Appendix G shows the breakdown of results for the UAE.

The factor rated most positively, in the KSA (and the UAE) was safety; all three items asking for perceptions of this factor (15f, 17a, 17b) had mean scores of above 4 (4.00, 4.49 and 4.14 respectively) and all had high percentages of ‘strongly positive influence’ or ‘strongly agree’ answers (25.4% seeing safety as having a strongly positive influence on their decisions to attend, 52.1% strongly agreeing that the venue was safe, and almost 327% strongly agreeing that the country is a safe place to hold international conferences). The results are consistent, clear and unambiguous across these three items: safety, of both the country and of the venue, is clearly perceived very positively by participants and would be likely to serve as a definite ‘pull factor’ to international conferences held there.

Table 5.15a: Practical Capacity: Responses to Statements on the KSA

(KSA) Practical/Tangible Factors		Frequency / Percentages										Means	S. D.
		n	%	n	%	n	%	n	%	n	%		
Question 15		1 Strongly Negative Influence		2 Negative Influence		3 No Influence		4 Positive Influence		5 Strongly Positive Influence			
15a	Obtaining visa	9	12.7	33	46.5	17	23.9	7	9.9	5	7.0	2.521	1.072
15b	Experiencing the culture	0	0	1	1.4	21	29.6	35	49.3	14	19.7	3.87	.735
15c	Unvisited before	0	0	1	1.4	40	56.3	20	28.2	10	14.1	3.55	.751
15d	Availability of information	3	4.2	13	18.3	32	45.1	18	25.4	5	7.0	3.13	.940
15e	Heritage	1	1.4	1	1.4	17	23.9	34	47.9	18	25.4	3.94	.826
15f	Safety	1	1.4	3	4.2	11	15.5	38	53.5	18	25.4	4.00	.844
15g	Gender segregation	17	23.9	29	40.8	22	31.0	3	4.2	0	0	2.15	.839
15h	Price	0	0	8	11.3	28	39.4	32	45.1	3	4.2	3.42	.750
15i	Entertainment	13	18.3	24	33.8	28	39.4	4	5.6	2	2.8	2.41	.950
15j	Word of mouth	3	4.2	17	23.9	31	43.7	14	19.7	6	8.5	3.04	.977
Question 17		Strongly Agree		Agree		Neither Agree nor Disagree		Disagree		Strongly Disagree		Means	S. D.
17a	The conference venue is safe.	37	52.1	33	46.5	1	1.4	0	0	0	0	4.49	.582
17b	This country is a safe place to hold international conferences.	19	26.8	45	63.4	5	7.0	2	2.8	0	0	4.14	.661
17d	Visa regulations make attending conferences in the KSA difficult.	13	18.3	36	50.7	13	18.3	9	12.7	0	0	2.25	.906
17g	This country is an expensive conference location.	1	1.4	18	25.4	21	29.6	29	40.8	2	2.8	3.18	.899
17i	Conference facilities in this country are not as well developed as in other locations in the Middle East.	3	4.2	19	26.8	21	29.6	27	38.0	1	1.4	3.06	.942
17l	Transport infrastructure in this country is excellent for conference attendees.	2	2.8	6	8.5	17	23.9	36	50.7	10	14.1	2.35	.927
Question 18		1 Very Bad		2		3		4		5 Very Good		Means	S.D.
18f	Practical organization	2	2.8	6	8.5	18	25.4	25	35.2	20	28.2	3.77	1.045

Source: Author, 2009

If, as Chiang points out, the safety and security factor is considered to be one of the five global forces that will drive the tourism industry in the new millennium (Chiang, 2000), then the positive responses to levels of safety and security in this study suggest that this would be a major supporting factor in the KSA's development of this industry. The item with the next highest mean score (3.77) to the three safety items, and therefore a factor perceived positively by participants, was that concerning the practical organization of the conferences, the factor directly connected to participants' experience and evaluation of the actual conferences. About two thirds of respondents rated the practical organisation as good (35.2 %) or very good (28.2%). On this item, there was no statistically significant difference between the mean score for the KSA and that for the UAE ( $z=-.941, p = .347$ ),

although the KSA did gain a greater percentage of ‘very good’ scores than the UAE (28.2% as opposed to 23.3%), which clearly indicates that in this area, Saudi Arabia has the capacity to meet international standards.

With regard to the remaining factors perceived positively, three of these (15e, the heritage of the country, 15b, the desire to experience the culture there, and 15c, the fact that it was a unique opportunity to visit all being perceived as positive influences in decisions to attend the conferences there) are closely connected to the country and what a visit there offers the participants, aside from opportunities to attend conferences. These three factors were also perceived by high numbers of participants to have had a ‘strongly positive influence’ on their decisions to attend (15%, 22%, and almost 28% respectively). Clearly, the country itself is a ‘pull factor’, a factor which could be seen to contribute to the KSA’s capacity to be an international conference destination. Data gained from the interviews (see the long discussion on the importance of the culture to respondents in 6.3.1) adds substance to these results: one of the main areas focused on by delegates in the interviews was their interest in the culture and their desire to explore it, and disappointment was expressed at the limited opportunities available to do this.

One final item gaining a mean score which positioned it, narrowly, as a positive factor was 15h, ‘price’, with a mean score of 3.42 and responses being almost equally split between this factor having no influence (almost 40%) and having a positive influence (45%). This was one of only three items for which respondents in the UAE gave a lower score (3.02), with the differences between the two scores being statistically significant ( $z = -2.544, p = .011$ ); one of the remaining two items, 17g, asking respondents whether they agreed that the KSA/the UAE was an expensive destination, also concerned price and indicated (with neutral and negative mean scores of 3.18 and 2.24 respectively) that, rather than price acting as a clear ‘pull factor’ in the KSA, it did not act as a deterrent to the same extent as it did in the UAE. Weber and Chon point out that, although a convention destination cannot set and control prices totally, the price variable is, nevertheless, a ‘significant marketing variable’ (Weber and Chon, 2002:63) and Crouch states that it is accepted that travellers are price sensitive (Crouch, 1999); the KSA to some extent has the advantage over the UAE with regard to this factor.

Availability of information was seen, based on the mean score of 3.13, as having neither a positive nor a negative influence. The difference between this mean score and that of the

UAE (4.10) is statistically significant ( $z=-6.533, p=0.000$ ); the suggestion is that the UAE makes more information available to prospective conference participants (that is, professionally ensures that the need for information is met), which positively influences their decisions to attend, than does the KSA. Whilst this item does not specify what type of information participants might want, the interviews shed light on this; participants in the KSA (the delegates) (see 6.3.2) were critical of the lack of information both about the conferences and the opportunities for extra-conference activities and entertainment, and both before and during the conferences in their discussions. Interviewees in the UAE made no mention of a lack of information.

The state of development of facilities in the KSA also gained a neutral mean score (3.06, as opposed to the mean score of 3.70 given by delegates in the UAE). However, these mean scores were based on the state of development of facilities in each country *in comparison* with those in other Middle East countries, and the picture is somewhat different when the results of questions 16 (whether conference tourism facilities were perceived as under- or over-developed or ‘just about right’) are taken into account (see table 5.16 below). In response to this question, just over 70% of participants thought they were ‘just about right’ although almost 30% thought that they were ‘under-developed’ (as opposed to 67.4% and almost 21% respectively in the UAE). The overall picture is that conference facilities in the KSA are perceived generally to be satisfactory, at least, and, again, this enhances the data gained from interview participants (see 6.3.2), who, on the whole, perceived that Saudi Arabia did have the facilities necessary to host international conferences. Davidson and Rogers suggest that what gives many emerging destinations a competitive edge is the quality of the facilities they offer (as well as price) (Davidson and Rogers, 2006) and the GIBTM Report (2009) indicates that, when asked what the most important issues are to focus on for growth, many point to the quality of the facilities.

Table 5.16: Conference Facilities: the KSA and the UAE

How developed are the facilities?	(KSA respondents)		(UAE respondents)	
	Frequency	Percent	Frequency	Percent
Overdeveloped	-	-	10	11.6
Underdeveloped	21	29.6	18	20.9
Just about right	50	70.4	58	67.4
	71	100	86	100

Source: Author, 2009

The final item gaining a neutral mean score concerned the extent to which ‘word-of-mouth recommendations’ had positively or negatively influenced participants’ decisions to attend the conferences in the KSA. Unlike the UAE, which possibly has enough of an established reputation for people to be positively influenced by word-of-mouth recommendations (and which gained a high mean score of 4), almost half of the respondents in the KSA (43.7%) were unaffected by this factor, with the remaining half being equally positively and negatively affected.

Factors which were perceived negatively, as far as mean scores are concerned, included visas, entertainment and gender segregation. All of these factors would impact on participants’ direct experience of the conferences they attended, either in their effect on travel arrangements or in their impact on the ways the conferences were organised and the extra-conference opportunities made available to participants. Zhang, Leung and Qu include ease of visa applications as one of the criteria affecting attendees’ decision to attend conferences (Zhang et al., 2007:53) but both items concerned to gain participants’ perceptions of and attitudes towards visa regulations, 15a (the influence of visas on decisions to go the KSA) and 17d (whether visa regulations made attending conferences there difficult), were rated negatively, with respective mean scores of 2.52 and 2.25. Almost 13% of participants saw visas as a ‘strongly negative influence’ (with 46.5% seeing it as a negative influence) and over 18% ‘strongly agreed’ that they made attendance at conferences in the KSA difficult (with over 50% agreeing with this). Results for the UAE with regard to both these items on visas (with mean scores of 3.77 and 3.44 respectively) showed statistically significant differences (for 15a,  $z=-6.474$ ,  $p=.000$  and 17d,  $z=-6.480$ ,  $p=.000$ ); respondents in the UAE clearly did not perceive visa issues so negatively as respondents in the KSA. Discussion of visas in the interviews with delegates and officials in Saudi Arabia painted a larger picture, with both officials seeing the complex visa system as creating a barrier to development of the industry (see 6.2) and all five delegates (see 6.3.2) expressing awareness of the issues created by visas.

In an article entitled ‘Where the elite meet’ (2004), it is acknowledged that business and pleasure do not always mix, but that a mixture of the two (balancing ‘rigor and relaxation’) can lead to a meeting being more successful. As discussed in chapter 3, opportunities for entertainment and enjoyment can be a significant motivator in attendees’ decision-making process, particularly, according to Yoo and Chon (2008: 65). However,

the mean score given to the influence of entertainment in Saudi Arabia was 2.41, again clearly positioning this factor as a negative one. Over half the participants (52%) perceived the influence of this factor negatively, with over 18% saying it had had a ‘strongly negative influence’ on their decisions to attend the conferences in Saudi Arabia. This contrasts with the fairly high mean score (3.88) given by participants in the UAE to the entertainment factor, with almost three quarters of participants rating entertainment there as a ‘positive’ or ‘strongly positive’ influence; the difference between this score and that for the KSA being statistically significant ( $z=-8.591$ ,  $p=0.000$ ). This could be a result of there being more western-style entertainment provided in the UAE. What is clear, however, is that, in the UAE, entertainment acts as a ‘pull factor’ whereas in the KSA, it was clearly perceived as a negative factor, which might influence attendees’ decision to revisit the KSA or to recommend it.

One item in this section scored lower than all other items on the questionnaire as far as mean scores are concerned: 15g, gender segregation. Almost two thirds of participants rated it as a ‘negative influence’ on decisions to attend conferences in Saudi Arabia (40.8%) or a ‘strongly negative influence’ (23.9%). To compare male and female participants’ attitudes towards gender segregation, a Mann-Whitney U Test was performed on this item: analysis of the responses (see table 5.17 below) indicate that there is no significant difference between male delegates’ and female delegates’ responses to this item ( $z=-.876$ ,  $p=.381$ ).

Table 5.17: Attitudes to Gender Segregation by Gender (KSA)

Items	Female		Male		Statistics	
	Median	Mean Rank	Median	Mean Rank	z	p
Q15g Gender segregation	2.000	32.53	2.000	37.18	-.876	.381

Source: Author, 2009

Many comments were made in the interviews in the KSA, and in the open-ended question 19, about gender segregation, comments which shed light on participants’ views and on the ways in which they were affected by segregation, particularly in a professional sense at the actual conferences (see 6.3.1 and 6.3.2); these, similarly, included comments from both male and female participants. This was the factor perceived most negatively by

respondents in the KSA; as there is no gender segregation in the UAE, this factor was not included in the questionnaire used there.

The following table (table 5.18), as mentioned in the introduction to this section, compares the median scores for the items in this section for both the KSA and the UAE, indicating whether there are any statistical differences between them. This table is followed by the final part of this section, which concerns responses to question 19.

Table 5.18: Practical Capacity: Statistical Differences between the KSA and the UAE

(KSA) Practical/Tangible Factors		KSA		UAE		Statistics	
		Median	Mean Rank	Median	Mean Rank	z	p
Question 15							
15a	Obtaining visas	2.000	53.86	4.000	99.76	-6.474	.000
15b	Experiencing local culture	4.000	76.19	4.000	81.32	-.769	.442
15c	Unvisited before	3.000	71.92	4.000	84.84	-1.926	.054
15d	Availability of information	3.000	54.32	4.000	99.38	-6.533	.000
15e	Heritage	4.000	86.48	4.000	72.83	-2.012	.044
15f	Safety	4.000	69.87	4.000	86.53	-2.546	.011
15h	Price	3.000	88.66	3.000	71.02	-2.544	.011
15i	Entertainment	2.000	45.97	4.000	106.27	-8.591	.000
15j	Word of mouth	3.000	54.25	4.000	99.44	-6.585	.000
Question 17		Median	Mean Rank	Median	Median	Z	p
17a	The conference venue is safe.	5.00	71.95	5.00	84.82	-2.083	.037
17b	This country is a safe place to hold international conferences.	4.00	73.35	4.00	83.66	-1.653	.098
17d	Visa regulations make attending conferences in KSA /UAE difficult.	2.00	53.98	4.00	99.66	-6.480	.000
17g	This country is an expensive conference location.	3.00	101.62	2.00	60.33	-5.932	.000
17i	Conference facilities in this country are not as well developed as in other locations in the Middle East.	3.00	63.87	4.00	91.49	-4.009	.000
17l	Transport infrastructure in this country is excellent for conference attendees.	2.00	57.54	3.00	96.72	-5.612	.000
Question 18		Median	Mean Rank	Median	Median	z	p
18f	Practical organization	4.00	75.48	4.00	81.91	-.941	.347

Source: Author, 2009

The final part of the questionnaire, as mentioned above, entailed respondents answering an open-ended question, question 19, which asked them to note what they perceived to be most problematic about attending conferences in the KSA (and the UAE). Almost all the results from question 19 (see table 5.19) were pertinent to the practical factors discussed

above. The factors most commented on by respondents stating what they perceived to be the main problems with attending conferences in the KSA were visas and gender segregation.

Table 5.19: Main Problems by Location: the KSA and the UAE

Main problems	KSA n = 37 / 71	UAE n = 35 / 86	Total n = 72 / 157
Q19a Visa	19	9	28
Q19a Gender	15	0	15
Q19a Negative image	4	5	9
Q19a Organisation	3	2	5
Q19a Lack of daytime social activities	2	1	3
Q19a Prices	2	17	19
Q19a Lack of information	2	1	3
Q19a Lack of entertainment	0	2	2

Source: Author, 2009

Consistent with questions 15a and 17b, visas were perceived as forming a constraint in the KSA, indicating that delegates there were, on the whole, more negatively influenced by the problem of obtaining a visa than were the delegates in the UAE. The visa problem is compounded by the issue of gender. An Egyptian woman complained that obtaining a visa to attend the KSA conference was a particular problem for a female delegate:

‘Visa is a major problem and if you do not receive an invitation for the conference, you cannot attend as a woman. You should come within a group and you cannot come as a business woman on your own.’

A discussion of the visa restrictions placed on women is in chapter one (see 1.2), but, briefly, women need to be accompanied if they are to visit the KSA and need to be over 40 years old.

Of the 15 respondents in the KSA who mentioned gender issues, there were almost as many men (7) as women (8). Thus, the difficulties presented to female visitors to KSA detracted from the experience of both men and women. This result is consistent with that of 15g (gender segregation) in which there was no significant difference between the scores of the two genders, each registering a negative attitude to gender segregation.

Among the KSA respondents, the difficulties facing female visitors to the country were elaborated on by six participants. Limitations placed on networking, reduced access to

speakers, the dress code and restrictions placed on women travelling were all specific areas commented on, although a Bahraini man simply complained about the ‘unnecessary segregation of female and male participants’. A Canadian woman commented in more detail that:

‘I am here with a mixed group of different genders. The men have experienced greater networking opportunities and have also had access to better views. The women had a constant stream of people walking past them because of the way seating was arranged. If gender segregation was relaxed or removed, I would return and recommend it without reservation’

As discussed in the literature review (see 3.2.2), networking opportunities are seen to be prime motivators in attendees’ decisions to attend a conference. Yoo and Chon find that professional and social networking opportunities are the most influential variables in decision-making, including within these, opportunities to see known people in the field, to interact with colleagues and friends, and to develop a professional network (Yoo and Chon, 2008). Zhang et al add the opportunity to gain ‘peer recognition’ (Zhang et al., 2007). All of these would be impacted on, for both men and women, as a result of gender segregation, indicating the negative implications of this for the KSA’s potential to be chosen as a conference destination

With regard to travel restrictions, an Australian woman commented on the ‘difficulty for women travelling. It remains more difficult for foreign women to think about attending anything in Saudi Arabia’. This was backed up a Kuwaiti woman, who said that the main problem she faced was: ‘transportation, especially for women’. Her teenage daughter explained that ‘there are no facilities for women who will be alone at any conference; they must be escorted by men or will be delayed getting to work’.

Finally, an Egyptian woman found the Saudi ‘dress code for ladies’ to be a problem. It is surprising that it was not a western woman who raised this issue. However, the dress code for women in Saudi is more conservative than that in Egypt where women have a choice of wearing western dress or the *hijab* (long loose garment and headscarf) and she was obviously not happy with this.

Consistent with the findings on price from question 17g (when 43.6% of UAE respondents said they found the UAE to be an expensive conference location as opposed to only 5.8% of KSA respondents), 'price' was noted as a main problem more often by UAE respondents (17 mentions) than by KSA respondents (two mentions) in answer to question 19. UAE participants of a range of nationalities complained that the 'hotels are expensive' and 'costs very high'. Comments from one participant in the KSA about price concerned 'the hotel prices - there are no special offers for the participants' and the perception is that it is 'an expensive country' (see 6.3.2).

Four other problems were mentioned. Organisation was commented on by three respondents from the KSA and two respondents from the UAE; lack of information and lack of social activity during the day by two and one respondents, respectively; and lack of entertainment by two UAE respondents. A Bahraini visitor to the KSA complained about 'delays in starting and finishing and too much protocol/ formality', while in the UAE, a South African participant bemoaned the 'lack of services' and complained that 'nobody seems very interested in helping'. The variation in the availability of entertainment facilities in the UAE was commented on by a South African delegate who said that 'Dubai has a lot to offer from an activity point of view – pre- and post-conference tours – while Abu Dhabi currently lacks activities for 5 days of incentives'. In the KSA, however, the Kuwaiti woman and her daughter were frustrated by the lack of daytime activities. The mother said there were 'no entertainment facilities, especially for people with their families. The activity just starts in the evening'. Her daughter concurred: 'SA is a night country so half of the day is activity-less with nothing to do'.

## **5.5 Conclusion**

Overall, the results to the items concerned with the macro level overview of the KSA's capacity indicate somewhat positive perceptions of Saudi Arabia's capacity to be an international conference destination (see research question 1.ii). The tendency in the responses is towards the positive and it is clear that experience of the country leads to improved perceptions of it, which demonstrates that respondents' experience of the destination was, overall, positive. Interestingly, the more positive results in the KSA were

connected to respondents' general experiences of the country and the conferences together, rather than to the conferences, and views on conference capacity, alone.

However, when the results for the KSA are looked at alongside the almost unequivocally positive (and highly positive) results for the UAE, the picture seems less rosy, and a very interesting point emerges from the data from the two countries. The results show that although both destinations are seen to be somewhat underdeveloped (or, at least, not well-developed) in terms of conference tourism, respondents in the UAE showed far greater enthusiasm for recommending it as a conference destination and, more importantly, were far more willing than KSA respondents to consider organising a conference there themselves. There appears to be greater faith in the UAE's capacity to be an international conference destination than there is in the KSA's capacity. This positive attitude towards its potential is borne out by views of its future capacity to be a global leader, views which are, again, more positive than those of KSA respondents and indicate that, although the long-term prediction for the KSA is more positive than the short-term one, as far as the UAE is concerned, both long and short-term predictions of its success are positive.

With regard to the research question, 'What is perceived as being positive and negative about current provision of international conferences in the KSA?', positive factors that came to light in the analysis are again very much connected to how international respondents perceive the *country* rather than the conferences and specific aspects of conference provision. The results indicate that Saudi Arabia is perceived as an interesting and attractive destination in terms of safety, its culture and its heritage. If Hosany, Ekinci and Uysal's advice that destinations should focus on the 'emotional components' of their image and should emphasize its 'distinct personality' in order to succeed (Hosany et al., 2006:641), then it seems that this interest in the distinct culture and heritage of Saudi Arabia would serve to attract international visitors to conferences there and would therefore contribute to Saudi Arabia's capacity to be an international conference destination.

Concerning the factors rated as neither positive nor negative - the availability of information, whether delegates were attracted to the conference or the destination as a result of word-of-mouth recommendations, and the stage of development of the facilities there - it seems logical that the UAE, already established as an international destination,

would have these factors in place and would therefore score so much more highly on them. The fact that the scores for Saudi Arabia are neutral is probably mainly indicative of it not yet having established itself internationally, rather than indicative of it not having the capacity to develop them. Having said that, it is necessary to point out that although the KSA may not have been rated so highly as other Middle East destinations in terms of conference facilities, facilities were still considered by a large number to be 'just about right'.

Those factors rated negatively - visas, entertainment and gender segregation - can be seen to be more closely connected than the positive factors to specific aspects of conference provision, and can also be seen to be highly relevant in the context of a discussion on an international destination. For an international destination, it seems important that bureaucratic procedures for entry into the country are kept to a minimum and are as stress-free as possible. The results clearly indicated, however, that visa regulations were perceived as problematic in the KSA. With regard to entertainment, again it seems that the KSA is not perceived as having a satisfactory level of entertainment provision, particularly not for an international destination. Finally, gender segregation, a distinct factor exclusive to Saudi Arabia, is clearly cause for concern among both male and female respondents. As a destination aiming to attract international visitors, this issue has great potential to lead to clashes with people from different cultures and therefore to deter people from visiting.

Clearly, to a greater or lesser extent, the practical aspects of conference provision will necessarily have contributed to respondents' perceptions of the two countries' macro capacity to develop this industry. However, although the UAE did not score quite so highly on the practical aspects of conference provision as they did on perceptions of its macro capacity, (there were fewer mean scores of 4 and above, for example, and the average overall mean score was 3.75 as opposed to 4), this did not affect the overall faith expressed in that country's potential to be an internationally successful conference destination. With regard to Saudi Arabia, however, although in some ways it is viewed as having the capacity to be an international conference destination, it appears that those factors that are rated negatively are having a distinct impact on perceptions of the country's potential. The perception that the country's long-term potential for success in this field is greater than its short term potential (although still not particularly assured)

implies that the negative factors hindering its development are seen as requiring time to be addressed. Interestingly, these negative factors (visas, gender segregation and entertainment) seem to arise from the socio-political context in Saudi Arabia which suggests that they are more deeply rooted and therefore that any attempts to modify them would indeed require more time. The full implications of these factors, which are also addressed in the interviews and analysed in the next chapter (see 6.3.1, 6.3.2 and 6.4), will be discussed in detail in chapter seven.

## CHAPTER SIX

# THE INDUSTRY IN SAUDI ARABIA: PERCEPTIONS AND PERSPECTIVES

### 6.1 Introduction

The aim of this thesis is to assess the potential for Saudi Arabia to be an international conference destination. The previous chapter focused on analysis of the quantitative data, which was mainly relevant to the first objective: assessing the capacity of Saudi Arabia to host international conferences through a consideration of the weaknesses and strengths of current provision and of perceptions of its overall capacity to host international conferences. In this chapter, the qualitative data is analysed. The aim of the interviews with both the delegates and officials is primarily connected to the second objective of the study: to elicit information that throws light on the social and political factors which might affect Saudi Arabia's potential to develop this industry. If the results from the quantitative data analysis elaborate on or enhance the information gained on social and political factors through the interviews, then these will be referred to when relevant. Although the primary objective was to focus on social and political factors, the interviews were also used to gather further information on the capacity of the kingdom to become an international conference destination (see objective 1) and this will be discussed when relevant. Furthermore, as stated in the third objective, data gained from interviews with officials and delegates in the UAE will be used to illuminate principally the social and political factors, but also factors connected to its capacity, that might support Saudi Arabia's potential to be an international conference destination, whether these be factors that enhance its potential or detract from it.

The chapter begins by describing and analysing the data gained from interviews with the officials, much of which clearly sheds light on socio-political factors and issues that are relevant to the aim of the thesis. This section will be followed by a description and analysis of the data gained from the interviews with the delegates. Data gained from both

the officials and the delegates in the UAE will be incorporated into each section when it serves to illuminate relevant areas of interest. The chapter ends with a discussion that draws together factors and issues arising from the interviews with both groups of participants in both countries and considers how these might impact on the development of international conference tourism in Saudi Arabia. In chapter seven, the results from this chapter will be incorporated with those from chapter five in a final discussion of the findings and their implications in relation to the aim of the study.

## **6.2 Analysis of Interviews with Officials**

In this section, the data collected from interviews with people involved in the organisation and provision of conferences in Saudi Arabia and the UAE will be analysed and discussed as a way to address research questions 2.i and 3.iii:

- 2.i What socio-political factors come to light in the views and information gained from officials in the KSA?
  
- 3.iii What socio-political factors come to light in the data gained from officials in the UAE?

As pointed out in chapter four, to preserve anonymity, all interviewees are referred to by a pseudonym. Of the two people interviewed from Saudi Arabia, one, A, works for the Riyadh Chamber of Commerce, and the other, B, works for the Jeddah Chamber of Commerce. Of the two people from the UAE who were interviewed, C holds a position in the Dubai Convention Bureau and D works for the MICE industry in Abu Dhabi.

The main note struck by the officials in Saudi Arabia during their interviews was one of reservations regarding the country's commitment and openness to developing Saudi Arabia's potential to be an international conference destination, and the resulting lack of coherent systems and structures in place that would support its development. The lukewarm commitment and openness to the development of the industry can be seen to arise from socio-political factors which are pointed to, sometimes explicitly and

sometimes implicitly, by the officials; these factors are therefore particularly pertinent in addressing the second objective of this study. In this section, the focus will initially be on particular attitudes in the KSA, and the systems that are structured according to these, that would – and do – form a barrier to the development of the industry; emphasis will be placed on the discussion of the reasons behind these attitudes, as expressed by the two officials. The focus will then turn to a consideration of how these attitudes impact on the development of the industry. Throughout this discussion, data gained from the UAE will be used when relevant (see objective 3).

Officials in Saudi Arabia are clearly aware, in a general sense, of the economic benefits to be gained from the industry. A expressed the view that the economic importance of the conference industry was obvious, not only in terms of how the conferences themselves ‘contribute to the city’s wealth’, but also in terms of how they contribute to the success of other sectors ‘such as hotels and transport systems’ and to the creation of employment. B seconded A’s view that the economic importance of the industry is obvious: ‘We all know that it is an important economic industry.’ Similarly, both the UAE officials were clear about the economic benefits to be gained from this industry, with C pointing out that it had ‘great economic viability’, and D, from Abu Dhabi, echoing A’s assertion that the industry contributes to success in other economic sectors: ‘... it impacts on everything in the city – shopping, taxis, everything.’ D pointed to the greater profitability of this industry in comparison with leisure tourism and outlined Abu Dhabi’s clear objectives:

‘Abu Dhabi is concentrating on conference tourism. We don’t want to be a mass tourism destination. We are only interested in high-end leisure and what we call business tourism, which is meetings, incentives, conferences, exhibitions. We want that sort of business for Abu Dhabi because of the economic benefits. Of course, it brings typically 6 to 7 times more than leisure travel.’

Evident in the more detailed comments made by the UAE officials, particularly D, was a somewhat greater sense of intention, clarity and commitment than those made by the KSA officials. Interestingly, the officials in the UAE focused equally on other benefits to be gained from ‘business tourism’, benefits arising from opening up to the outside world and gaining from the knowledge and expertise brought into the country through

conferences. C appreciated the industry as being ‘an excellent source of knowledge and information’ and D drew attention to the expertise brought into Abu Dhabi through the Global Ophthalmology Congress being held there, and his regret that the country had not won the Diabetes Congress as he said this would have been hugely beneficial to Abu Dhabi as the country with the second highest incidence of diabetes in the world. This reflects how open the UAE is to the outside world and how appreciative they are of the wider benefits of conferences.

Both the officials from Saudi Arabia seemed realistic in their assessment of the stage of development Saudi Arabia had already reached with regard to the industry: B described it as ‘[e]arly, still early, at the infant stage’ and A noted that there were movements towards developing it and that the possibilities for doing so could be seen in the establishment of various governmental groups of experts whose job it is to consider ways to develop it and ways of ‘overcoming difficulties’. He pointed out, however, that, although in a financial sense it is important, there were still many constraints and regulations affecting its development. Whereas both officials from the UAE also considered the industry there to be in its infancy in terms of development their comments did not seem to be arising from an awareness of how problematic development might be, but rather on a realistic and forward-looking understanding of the stage they had reached and what they needed to focus on. With regard to Abu Dhabi, D described it as ‘very new’ saying they are considered an ‘emerging destination’ and that they have ‘literally just started’ but that they are learning a lot from what Dubai has done. The representative from Dubai spoke more inclusively about the UAE, saying rapid steps have been taken in the area of corporate meetings and exhibitions but that generally, with regard to conferences, meetings and exhibitions, they are still very much taking their first steps. With regard to Dubai, he said that they are doing well as far as corporate meetings and incentive travel are concerned but that the infrastructure necessary to host international meetings and association meetings is still in its infancy.

The constraints perceived to be forming a barrier to the development of the industry in Saudi Arabia formed a distinct thread running through most of A’s comments and, to a lesser degree, but no less noticeably, through B’s comments. Indeed, it is one of B’s comments that most succinctly and powerfully reflect the ambivalence behind the lack of commitment to the industry in Saudi Arabia:

‘There is a belief in tourism in Saudi Arabia today, which is why the High Supreme Commission for Tourism has been established. At the same time, however, *there is no intention for the country to open to foreign visitors.*’  
(Author’s emphasis)

He emphasised this point later in the interview by saying that: ‘There is support but there is also hesitance to open up this kind of tourism completely’ and later stated baldly and with great candour, his view that ‘we don’t welcome visitors’, a statement that seems to contain the essence of the socio-political resistance to opening up the country to foreign visitors. B attributed the reluctance of the country to open up to outsiders to the fact that the country is very conservative and wary of the potential for damaging influences to the culture being allowed in from outside:

‘It’s a very conservative country and they are afraid of the type of speakers and who is going to speak; they might say something that might affect the Kingdom or the society.’

This resistance to the influences, particularly of the western world, is in sharp contrast to the comments made by UAE representatives, which indicate an appreciation of the less immediately tangible advantages of opening up to knowledge, information and expertise from the world outside the Gulf.

A also emphasised the existence of serious reservations regarding opening up the country to conference tourism, pointing to how the ambivalence regarding foreign visitors, particularly with regard to the participation of women, was manifested in the conflict between religious authorities and official bodies:

‘It’s not straightforward. The participation of females is still a sensitive issue. Even if permission is granted by the official bodies, the religious authorities can create difficulties during the events. Even the embassies face similar difficulties.’

Such resistance and reservations can be seen from the data to influence many factors connected to the development of the industry.

B from Saudi Arabia asserted that ‘there are many factors – logistic, regulatory, legal – besides the infrastructure which place constraints on the development of conference tourism in Saudi Arabia’, although he did not look in detail at what may lie behind these factors. The lack of structures and systems in place that would ease the procedure for visiting the country could, at least partly, be a result of the resistance to western (non-Muslim) visitors. Indeed, many of the comments made by the officials focused on the barriers put in the way of easy entry to Saudi Arabia and therefore barriers to the organisation of conferences. These included: the procedures for gaining permission to hold a conference; the complex regulations regarding visas; the effect of these two latter factors on decision-making, which, in turn, prevented progress; restriction on female participants, which prevent the country from being able to offer conferences of an international standard; and the constraints placed on marketing and promotion by the ambivalence felt towards attracting international visitors. Comments regarding each of these will be analysed below.

A number of comments were made regarding the complex procedures for gaining permission to hold a conference in Saudi Arabia, with B asserting that the complexity of the system was the reason why the industry was still in the infant stage of development and A saying that neighbouring countries make the organization of events easy and have thus created demand for the required facilities, which in turn has led to good investment opportunities for the private and public sectors. Both representatives for the KSA, however, pointed to these procedures as being major obstacles to the holding of conferences in the kingdom. B stated that ‘you cannot do anything without permission’ and that the greatest problem with organising conferences and conventions is the authorisation that is required from a number of different bodies. As the Chamber of Commerce has been given ultimate control over which meetings can be held, everything has to go through them and they have a long list of conditions.

A supported B’s view that the industry is still in the early stages of development because of the requirement that every stage be checked and permission granted for it. He gave a more detailed description of the procedures referred to by B. If a meeting is to include foreign participants, a request needs to be made to the Chamber of Commerce detailing: i) the objectives of the meeting; ii) the theme of the meeting; and iii) who the speakers are. This request is then sent to the Ministry of Trade, which grants licences for the events

themselves and for the organizers, and which is also responsible for arranging permission from other relevant bodies. These include: the Ministry of Domestic Affairs, which is responsible for granting visas; the Ministry of Foreign Affairs, which is responsible for political aspects, including finding out about the ideologies and attitudes of foreign speakers; and the City Council, which is responsible for giving permission to use a particular venue. Once a request has been agreed, it is sent to the organisers. A stressed that the role of the Chamber of Commerce is simply that of a go-between; that they have no input in the procedures. The Chamber is in the process of drawing up a set of guidelines for those wishing to organise an event; this will be posted on a website and will ease the bureaucracy somewhat by sending any request directly to the relevant bodies. The fact remains that every aspect of the organisation of a conference – but most particularly those aspects concerning the content (arising from the ideologies of the speaker, the objectives of the conference and the themes that will be focused on) – needs to be evaluated and given official permission before the conference can go ahead.

One aspect of the complex procedures for holding a conference is the system for granting visas. Difficulties created by the necessity for foreign visitors to the KSA having to have visas, and the regulations around obtaining a visa, were focused on by both A and B. When asked what stage of development conference tourism has reached in Saudi Arabia, A pointed to the fact that although it is seen as economically important, development is hindered by many constraints and regulations, ‘particularly regarding visas’. He pointed out that because visitors are aware of this process and hesitate to come to Saudi Arabia, then both foreign and Saudi organisers also hesitate to organise events in the kingdom that involve foreign speakers and visitors. It was interesting that A said that the process had been easier in the past and that he stressed that the granting of visas by the Ministry for Domestic Affairs is a major constraint.

‘You wouldn’t believe it was easier ten years ago – the process has become more complicated; in the past, the person responsible for economic matters within the Ministry for Foreign Affairs (...) would have been able to grant an exhibition organiser four hundred visas within twenty four hours for an exhibition planned in a particular city at a particular time. Just look at the process that we have now and you’ll be amazed. We know the reason for this - the Ministry for Domestic Affairs.’

Delegates' comments below (6.3.1) show that some of them experienced difficulties with visas, with one delegate similarly commenting that the system used to be easier. The results from the quantitative analysis add to the picture of the difficult effects of visa regulations, with high percentages of delegates seeing them as a negative influence and a hindrance to attendance.

B pointed out that any conference that involves foreign speakers has the potential to be problematic because the visas need to be officially planned. Apart from the fact that gaining permission is more complicated when foreign speakers are involved, he explained how it was important to attract visitors to a conference by having famous names speaking, but if for some reason a key speaker is unable to attend and needs replacing, it is extremely difficult to find a suitable (equally important) speaker, not only because of the geographical distance, but also because of the difficulty in 'quickly and easily obtaining a visa.'

As well as complicated visa procedures, a clear sign of resistance to outside visitors, B also drew attention to issues with Customs Control if, for instance, an industrial exhibition was held that brought in products from outside the kingdom; clearly any complex regulations and procedures in this area would also be a deterrent to organisers deciding to hold an international conference or exhibition in Saudi Arabia.

Because of the difficulties created by the above procedures and regulations, Saudi Arabia is faced with dilemmas regarding the most effective steps to take to develop the industry. A asks 'What comes first – the chicken or the egg?' The practice of attracting international partners would be beneficial to the development of the industry as it would bring in outside experience and help to attract greater numbers of international visitors. However, as A pointed out:

'What's the point of forming a partnership with a British company, first, as Dubai and Bahrain have done, when we would all have these constraints to deal with? Last year, a whole conference was cancelled because permission wasn't granted before the set date; this wouldn't have happened in Dubai or Bahrain.'

Similarly, when explaining why no Saudi representatives had been at the convention and conference tourism conference in Dubai the previous month (April 2008), A reiterated his previous point by asking how it would be possible as a businessman looking for real opportunities to bring any contacts to Saudi Arabia when there were so many constraints. A questioned whether it is necessary initially to make the process easier and create investment opportunities for the private sector so that they can bring professional organising companies in or to bring the organising companies in first:

‘Do you make the process easier and create investment opportunities for the private sector so that they can bring professional organising companies in? The private sector has the capacity to adapt to any situation - the proof of this, if you take industry, is if they do business with an international company, they succeed but when you organise events for PR in general you’ll find a lack of success. It’s not because they don’t have the ability – they do – but the problem is the constraints.’

B was also aware of the dilemma created by the constraints, asking:

‘Do I need to have purpose-built conference centres and then have the conferences or exhibitions - or the other way round? There is controversy regarding this currently.’

Data from the UAE officials contrasted markedly with that from the KSA officials and its focus on the difficulties and hindrances to development created by certain attitudes, procedures and regulations. The procedure for gaining a licence to hold meetings in the UAE was described by D as ‘straightforward’ and he said that efforts were being made to make it more so. C asserted that the UAE are possibly more advanced than their neighbours in terms of their infrastructure and accessibility. He also emphasised the fact that they have an open policy, and therefore no red tape, and that the UAE are tax free, all of which factors encourage the development of the industry.

Saudi attitudes towards women and their engagement in public life leads to restrictions being placed on them, restrictions which might also serve as obstacles to the development of the conference industry there. During the initial analysis of the data, there appeared to be conflicting views on this area from the two representatives from Saudi Arabia. B was

the most positive and optimistic about the role women will play in the industry, a role he expects to be significant since, according to him, most recently established companies in the conference tourism industry employ women. He could not see any reason why, at least in Jeddah, women would be prevented from organizing conferences. In Riyadh, he said, some women have expert companies and most of their conferences and exhibitions have female participants; he believed the field attracts women naturally and will therefore be dominated by them, even as speakers (although classifying a woman as an *international* speaker will make it easier to make all necessary arrangements). He was of the view that all obstacles regarding women will be overcome. The author's experience and knowledge of the country, however, led her to question this perspective; it is very difficult to conceive of women *actively* and *openly* participating in the industry without constraints, rather than simply being engaged in, for example, the organisation of conferences from 'behind the scenes'. A had a very different view of the situation regarding women, which matched that of the author; when asked whether the flexibility he had talked about in regard to Jeddah extended to the participation of women, he responded by saying that society plays a big role and that problems arise when there are objections to something, the implication being that society might object to women working in this industry. Contrary to what B argued – that they will play a big role in the industry and that, at least in Jeddah, he could not see anything that would prevent women from organizing conferences – A said that although the official attitude towards women is clear, there are certain things that society still does not accept:

‘Society plays a big role and the problems start there when there are objections to something. As a country, we want to open up this area but there is pressure from some groups not to; there is a tug of war going on and we're in the middle, and not wanting to interrupt the symphony of the society. Any disturbance would create upset in the country and so we have to be careful about what we do in this area.’

He gave the example of the Euro money conference, which received criticism from certain groups for organizing a desert camp for the female participants. It seems that, even if restrictions were to some extent relaxed at international conferences, and most particularly in the more liberal Jeddah, it would still be difficult for the country to

completely relax them (outside the confines of the conference as well as during them), and therefore to host competitive international conferences.

There was no similar ambivalence in the comments made by the UAE representatives with regard to female participation and engagement in the industry. Obviously, this is a result of the lack of pronounced attitudes in the UAE with regard to women's roles in society and the corresponding lack of restrictions placed on them there. Comments made on women by both UAE representatives focused on the positive contributions to be made by them to the development of the industry. Speaking on behalf of the industry in Abu Dhabi, D was very affirmative of the role women can play, saying that many women are employed by the Tourism Authority and, similarly, many women have been recruited from university courses in media and tourism to work on the current conference. She said the Abu Dhabi authorities wanted to encourage female participation and that Emirati women have many opportunities if they have a degree and want to develop a career, because Emirati people are in demand. Speaking for Dubai, C said there are a significant proportion of women in the industry. He added to D's views that the women they recruit are 'enthusiastic' and 'professional', his view that they 'have a great sense of organization', are 'better organizers than men' and 'are more creative in this field'. Men, he said, would probably not pay so much attention to cultural or recreational aspects as women and seeing as the entertainment factor has increased in importance as far as attracting delegates is concerned, this was an important area to consider.

The area of entertainment in Saudi Arabia is another factor that can be seen from the data to be impacted on by social and cultural attitudes and standards. The practical provision of information regarding where to go, where to eat, where the heritage sites are that they can visit, and so on in the KSA was deemed difficult because of the lack of information available and the lack of systems for facilitating visitors to do things. It was noted that, whereas in other countries, attendees are given information and left to make their own arrangements, in Saudi Arabia, the organizers need to be responsible for 'everything', from arrival at the airport, to hotels, to meal arrangements, to entertainment. This was confirmed by D in Abu Dhabi saying that rather than organising leisure activities for visitors, they just 'help with suggestions' for sightseeing, spa programmes, and so on. B explained that first-time attendees were interested to learn everything about the KSA and required comprehensive information. He said that this conference had taught him that

they need to put information about what to do and where to go on the website; that there is not sufficient information available (even to the Chamber of Commerce) regarding what is available for visitors to do. His awareness of this factor, and willingness to address potential problems created by delegates not having information, indicates a willingness on his part to make a personal effort. Even if visitors were given this information, however, the responses from the officials pointed to a general lack of readiness to host international visitors, and a lack of systems in place to facilitate their freedom to move around.

Ambivalence towards foreign visitors can be seen to have many repercussions, both obvious and subtle. A pointed to a lack of professionalism in the organisation of conferences despite his view that the KSA has the capacity to host international ones, as proved by their hosting of the OPEC conference. However, he did not specify how this lack of professionalism manifested itself. B, on the other hand, said that although the organisation of that year's (2008) JEF was 'really good', there are organisational problems each year because of the underdeveloped infrastructure. He listed a range of problems: the previous year's registration website, which registered English names in Arabic; the lack of notification from Arab delegates if they were unable to attend, leading to seating issues; the fact that when an ambassador had been unable to attend, his entourage also failed to attend; the expectation on the part of Arab delegates that they would be seated in the front row, rather than be allocated seats as they would be at international conferences. Whether these culturally-based behaviours would have a negative impact on non-Saudi participants was not commented on; the standard of professionalism in the organisation of the conferences, however, would probably be affected by such behaviours, as might an attitude which shows little awareness of non-Saudi codes of behaviour at international conferences.

A final and very significant effect of the attitudes towards opening up to foreign visitors, and the obstructive nature of the procedures for organising conferences in Saudi Arabia, concerns marketing. Unlike the Saudi representatives (whose methods for publicising events, attracting clients, and marketing the country as a conference destination will be discussed below), the representatives for the UAE discussed a range of very specific strategies they use to publicise their conferences abroad, focusing particularly on their relationship with organisations and with other countries. Their strategies will be discussed

first as a basis for illuminating the limitations in the approach of Saudi Arabia. Their stance was a proactive one and their intention clear: 'to attract the whole world'. With regard to Abu Dhabi, D said they attend the main MICE shows and C, speaking of Dubai, said they promote their meetings through participation in global conferences. D also pointed out that the Abu Dhabi team are very involved with associations like ICCA (International Congress and Convention Association) and MPI and have offices in the UK, Germany and France, which they use to promote meetings, a strategy also used by Dubai, which has fifteen offices around the world. Abu Dhabi has established an 'energy city alliance' with Perth, Aberdeen and Calgary, which serves as a way to exchange leads, information, advice and support. The Abu Dhabi representative also referred to three further tools they use for marketing: the first is their website; the second is through contact with the GIBTM organisation; and the third, their planners' guide. C, speaking on behalf of Dubai, added that meetings were also promoted through the organizers themselves or the person or organization establishing the conference, as they often have a database that can be exploited. The Dubai respondent said they looked for new clients through their fifteen international offices, through attending international conferences, and through targeted advertising and marketing campaigns, as well as by hosting famous people to attract new clients. The KSA officials pointed to more limited ways of marketing themselves, focusing on the Chamber of Commerce's endeavours to contact other Chambers around the world and contacting all relevant organisations, foreign companies and Embassies to gain their mailing lists and contact companies on them.

What was obvious was that international conferences in the UAE are publicized and marketed through contact with international organizations, companies and cities; their attempts to attract new international clients, similarly, is carried out through international channels. In contrast, B's assertion that the tendency in the KSA is to focus on Arab countries (saying they had contacted many companies in Dubai and Beirut, particularly those who provide better conferences, and asked them to go to the KSA and form companies there), and his regret that they had not yet contacted sufficient Saudi companies, indicates a focus on national and regional business. This is understandable in light of the procedural and social obstacles to attracting international business and B expressed regret that Saudi Arabia was not at all well promoted as an international conference destination, and concern over the image held of the Kingdom:

‘There isn’t any kind of distinctive marketing of Saudi Arabia as an international conference destination. The perceptions the outside world have of Saudi Arabia create a problem for the Kingdom; I don’t think there can be good marketing – we don’t welcome visitors.’

The pessimism in this comment is in sharp contrast with the more optimistic tone B normally took regarding the possibilities of the KSA developing this industry, an optimism indicated in part by his insistence that ‘of course’ he thought the obstacles created by regulations could be overcome, and indeed were being overcome. His concern regarding the image held of the Kingdom by the outside world is confirmed in part by D’s assertion that the perceptions people hold of the Middle East, whether right or not, might discourage them from visiting until they realise that what they perceive to be the case is not. Without marketing and the creation of a more positive image, it might be difficult for Saudi Arabia to create a different image for itself. More importantly, B’s comment points to a belief that, despite a positive attitude towards the development of the industry, despite all the positive aspects of the industry that may be in place, and despite all the improvements being made, a fundamental barrier to its success, as indicated at the beginning of this section, lies in Saudi Arabia’s resistance to welcoming visitors.

### **6.3 Analysis of Interviews with Delegates**

The following section is divided into two, with the first analysing and describing data relevant to socio-political factors which might affect development of the industry (focusing on delegates’ images of the country and its culture, and their perceptions of and perspectives on the restrictions and resistance they faced) and the second focusing more closely on data relevant to Saudi Arabia’s capacity to be an international conference destination (focusing on both the macro and micro capacity of the kingdom to host such conferences). Research objectives one and two are therefore addressed in this section, although the emphasis is on the second.

### 6.3.1 Delegates: a Focus on the Socio-Political

One of the most striking aspects of the data gathered from delegates in Saudi Arabia was the emphasis placed on culture. This was evident both through the expression of a strong interest in the culture and a desire to be granted more access to the society and more opportunities to explore it, and, in contrast, through the expression of disappointment in what was perceived as a lack of a desire to welcome foreigners and a feeling that the country felt very ‘closed’. Connected to the latter were comments made on the restrictions placed on visitors to Saudi Arabia, many of which can be seen to arise from social, cultural and political factors at play in the Kingdom (and which are therefore relevant to the second objective). In this section, research questions 2.ii and 3.iv are addressed:

- 2. ii What socio-political factors arise in the views and perceptions of international delegates at conferences in the KSA?
- 3.iv What socio-political factors arise in the views and perceptions of international delegates at conferences in the UAE?

What was particularly noticeable about comments on the image of Saudi Arabia was the fact that all delegates in the KSA had something to say about this, particularly in relation to the culture – and all comments showed a level of affective response to this area which was lacking in comments made about the UAE. It was clear that the participants in the KSA felt both negatively and positively about the country (and quite strongly negatively and positively judging by the number of comments passed and the language used); however they felt, their image of the place was a definite focus and had a pronounced effect on them (the implication being that it would have a serious effect on their decisions to attend conferences there). Indeed, the image held of a country by potential visitors plays a key role in influencing their decisions to visit (Yoo and Chon, 2008; Breiter and Milman, 2006; Zhang et al., 2007; Bradley et al., 2002; Hiller, 1995).

Despite the fact that most delegates reported a change in their image of the country from negative to positive, the fact remains that the image they had held prior to visiting was negative. More importantly, however, are the signs that, although their perceptions improved in some ways, the image they had held prior to their visits was to some extent

supported by what they experienced – and that the negative aspects of this were very closely tied into the culture.

Although Dora believed that negative images were not based on actual experience, but on what people had been told, nevertheless, prior to visiting Saudi Arabia, her image of it had been negative: ‘When you tell people you are travelling to Saudi Arabia ... mostly people have negative things to say about Saudi Arabia.’ Interestingly, the comments made by the participants in the UAE, by implication, added to the impression of there being a negative image held of Saudi Arabia, or, at least, of Arab countries generally; the concern of these delegates was that the image formed of the UAE would be likely to be affected by negative images of other Arab countries and that this may impact directly on the UAE’s future success in the meetings industry, despite the fact that many of the ideas held may not be true in actuality. Although they did not specify which Arab countries they were referring to, it is possible that Saudi Arabia, which has such a pronounced image, was one. Nick argued that the image held of Saudi Arabia was based on feelings of fear: ‘There is this fear... There may be some issues in convincing people going to a conference that Saudi Arabia is safe.’ He did not elucidate on what the fear was about apart from to say it applied particularly to women, saying ‘They don’t want to come - especially women, because they are afraid.’ Pedro also touched on the fear women might feel in a reference to his wife and their decision for her not to accompany him out of a fear that ‘... she will not feel comfortable in walking around. I feel that she will be intimidated by the situation.’ This apprehension seemed to be based on a lack of familiarity with the rules and a fear of unintentionally breaking them: ‘I don’t know if she can [go on her own to a shopping mall] or not - if that is appropriate or not’. The lack of more concrete reasons for the fear, not only on the part of women, but generally, does suggest that this fear is based on a mixture of the objective knowledge, emotional thought, impressions and prejudices which serve to create image according to Lawson and Baud-Bovy (see 3.3.1.i), rather than on actual knowledge and experience (Lawson and Baud-Bovy, 1997). As discussed in chapter three, Bradley, Hall & Harrison argue that image has a significant effect on whether a destination is chosen, regardless of whether perceptions are subconscious or not (Bradley et al., 2002).

Interestingly, when discussing the negative image held of Saudi Arabia, two delegates attributed this partly to the KSA not being well-promoted as an international conference

destination. Flo asserted that, in Australia, ‘... nobody knew anything about it.’ Dora also believed that the media need to present a better image of the KSA to counteract negative perceptions and that this could be achieved by the KSA ‘working with the media to show the world what Saudi Arabia is all about.’

Despite the fear inherent in their negative perceptions of the country, the participants did, however, make it clear that their actual experience of the country was leading to enhanced interest: for two delegates who had previously visited Saudi Arabia, their earlier – positive - experience had given them the motivation to return; three of the five delegates also expressed a desire to return to the KSA to learn more about Saudi society. Despite the negative things Dora had been told to expect, she found that what she experienced was ‘different; I enjoyed travelling to Saudi Arabia and enjoyed my time here - the people treated me well and made me feel at home’. ‘I like the people’, she said. According to her, ‘negative things’ said about the country are not based on experience: ‘I think it is a perception issue - what people have been told or led to believe of the country.’ Sally reflected that ‘Like any other country, when you see things more closely, this makes your impression much better.’ Nick concluded that negative reporting on the KSA had led to a false or at least an exaggerated picture: ‘A lot of the stories you read about are not true. They may be true, but represent a very small part of what Saudi Arabia is about. But if you haven't been here before that's all you know.’ The results of the quantitative analysis with regard to ‘before and after’ images of the country illuminate this area in their indication of a considerable shift from negative to positive images as a result of experiencing the place (see 5.4.2).

As far as the UAE is concerned, this shift in image was not so pronounced (see 5.4.2). The movement was more from a neutral to a positive stance than it was from a negative to a positive stance, which could be seen to emphasise the poor image held of the KSA before participants actually visited it. With regard to the UAE, very little was said by the delegates about whether or how their image had changed as a result of their visit. Only Keith explained that his image of the Emirates before visiting them was connected to money, oil, a lack of culture, too many expatriates and modern buildings; at the end of his visit, he perceived the problem they have as being connected to the need to establish what their *essence* is - what their people are and what they bring to the world - of working out what the UAE represents in terms of Middle East culture. Neither Darren nor Duncan

seemed concerned to explore this area. Their comments were, rather, concerned with assessing the provision of conferences in the Emirates and with pointing to issues which might affect the successful development of the international meetings industry there, although Duncan did say he considers the UAE to be ‘very tolerant, ... very safe and open-minded’. This comment in itself is interesting, however. The main concern of these two delegates with regard to image was that people may hold the same image of the UAE that they do of other Arab countries and that this would affect the UAE’s potential in this field. That one aspect of that image is that westerners may fear a lack of tolerance and open-mindedness as well as a lack of safety, makes this comment seem almost engineered to dispel that image of the UAE.

Duncan expressed the belief that some people may hesitate to attend a conference in the UAE because of misperceptions held regarding doing business in a Muslim country, women’s rights and labour issues. Darren focused on politics, arguing that some people may hesitate to attend conferences in the UAE, and even to choose to site their conferences there, because of misunderstanding the political situation and seeing all Arab countries as one; he emphasised that he saw this misperception as a weak point in the potential development of meetings tourism in the UAE and expressed the view that international conferences would benefit the UAE by bringing more people there and creating greater understanding between other cultures and the UAE. Darren echoed Duncan’s concern regarding misperceptions of the country by arguing that, although he thought the UAE had the potential to be a global leader in the field, they needed to fight some of these misperceptions if they wanted to succeed.

Again, these concerns act to emphasise the impact of a negative image and draw attention to the likelihood that some of the issues with image that delegates in the UAE feel do not apply to that country, may prove, in actuality, to be true of the KSA. In contrast with these comments, those made by delegates in the KSA concerning image focused on their own personal experiences of the culture and shifts in their perspectives, rather than on the bigger picture of how this might affect the success of the industry there,

No research has been found that focuses on the extent to which experience of a place changes the images delegates attending conferences there hold of it or the attitudes they have towards it. Although research has been carried out into the effect post-attendance

attitudes have on intentions to attend future conferences and to recommend conferences (Leach, Liu and Winsor, 2008; see 3.2.2), there is a lack of research into post-visit attitudes towards a *country* and the effect these may have on decisions to attend another conference there.

It is worth mentioning the importance of the cultural element in attracting visitors to a specific destination. Many travellers, particularly western visitors who have little experience of Arab countries, have the desire and curiosity to learn about the culture of the country being visited. Okruhlik puts forward the idea that, although there is nothing ‘exotic, strange or mysterious about Saudi Arabia’, one of the main lures to tourists generally is the image they have of it being ‘somehow shrouded, off-limits, and secretive’ (Okruhlik, 2002:11). She says that the ‘perceived slightly taboo nature of Saudi Arabia is a primary attractant to tourism’ (Okruhlik, 2002:11) and this perception is borne out to some extent in what was said by delegates. Four of the interviewed delegates in the KSA expressed an interest in the cultural aspects of Saudi Arabia. The main image held of Saudi Arabia, and what seemed to make the country interesting to the delegates interviewed there, was that it had an air of mystery and intrigue to it. According to the Spanish delegate, Pedro,

‘Saudi Arabia is very interesting for the western world. It’s intriguing that there is a mystery around Saudi Arabia, because of the customs and the way things are here which is very different to the way they are in our place. So that interests me enough. That is an attraction - that mystery, that myth of doing things differently’.

He described Saudi Arabia as being ‘much more properly respectful of customs than other Arab countries. That is the first impression I have got.’ Flo found the mystery referred to by Pedro exciting: ‘There is interest, a bit of fear, but it’s a very exciting destination’. She expressed ‘a great love for the Arab culture and an interest in the language’ and described the country as being ‘a very energetic place to be’. Dora expressed her enjoyment of ‘experiencing the different culture and making a contribution to the tourism industry of Saudi Arabia’ and described the country as an exotic cultural experience for westerners which provides ‘a different experience ... a cultural experience ... it is an exotic destination and location’. Nick pointed out that Saudi Arabia is a place

‘I’m interested in coming to’, partly because of his interest in tourist destinations and his desire to ‘com[e] to Saudi Arabia to see how it is developing’; he, similarly to Flo, Dora and Pedro, focused on the elements of uniqueness and exoticism associated with the country:

‘Saudi Arabia as a destination will be unusual - attractive to some groups because it provides a way for them to come to different places. So it’s a little bit different and unique at the same time.’

Despite seeing it as advanced – ‘like any developed country’ - in terms of infrastructure and provision of quality hotels in beautiful settings, Pedro focused on his impression that the culture is ‘quite exotic’, which made it an interesting place to visit. Clearly the destination was considered by most participants to be exotic, interesting and unique, characteristics found by Jago and Deery to act as a considerable motivation for delegates to attend a conference (Jago and Deery, 2005) (see 3.2.1).

With regard to the image of the physical landscape of Saudi Arabia, this is often quite commonly imagined to be a desert, whereas in fact it is a country with remarkably diverse landscapes, which other countries in the region may not have; as Crouch and Louviere identified, physical setting is an important dimension in choosing a destination (Crouch and Louviere, 2004). Flo admires Saudi Arabia’s physical beauty: ‘it’s very diverse in its beauty; every region in Saudi Arabia has its own physical attributes’.

The image participants said they had of the KSA being a unique, exotic place to visit seems to have a strong effect on their desire to learn about the culture and the language used to describe it is strong, colourful, affect-laden language. The same level of interest was not, however, apparent in the responses of delegates at the UAE conferences, which is interesting considering that both the UAE and the KSA are located in the same region and share similar cultures. Although there was some expression of interest in the culture, it seemed almost as though ‘lip service’ was being paid to this aspect. Darren mentioned that what he liked about the conference he was attending was ‘... being in the UAE and learning and experience [sic] more about the culture and opportunities.’ Duncan commented that he liked the UAE a lot, giving one reason as being that it has ‘great traditions’; he also said that one of the reasons he would recommend the UAE as a good

place for conferences was that it enabled people ‘to discover a different culture’. There was a distinct contrast between the language used by these delegates when talking about the culture – and the amount they said about it – and what was said by delegates in the KSA. This could be because the issue of culture is probably not such an important factor for the UAE, and possibly indicates that its image is more closely tied to business purposes. As far as Dubai in particular is concerned, however, the comments of one participant, Keith, demonstrated his view that culture *is* important but lacking: he perceived it as being devoid of culture and interest, criticized the lack of a quality, authentic and rich cultural flavour to the activities and events, and described it as ‘plastic, a building site, not that friendly’, saying he felt that they did not know who they were, were culturally sterile and were solely interested in buying things. He held quite a different opinion of Abu Dhabi, however, describing it as having ‘soul’, being ‘slower’ (than Dubai), being ‘potentially great’ and ‘more interested in their development’.

Returning to the responses of participants in the KSA, it was clear that a common theme arising from these is that foreign delegates are keen to experience Saudi society. In Saudi Arabia, Flo, for example, was very enthusiastic about the conference being an ‘exceptional opportunity’ for international delegates to experience Saudi society, ‘... the values, the motivations, the problems.’ She pointed to the diversity of culture within Saudi Arabia, which she thinks might help in developing tourism in each province there: ‘It also has different cultural attributes - Riyadh has a very different cultural environment, really - and that means that every province in Saudi Arabia has the possibility to develop their tourism.’ She described Jeddah as having ‘a particular personality’ and being the ‘perfect destination as a melting pot and meeting place’, but insisted that in all areas of the kingdom, ‘there are great opportunities’ and that she believed ‘a lot of people would like to visit’. Experiencing the culture and exploring the heritage was found to have a strong influence on delegates’ decisions to attend conferences in the KSA (see 5.4.1). However, what arose from the interview data were the obstacles to delegates actually being able to do this, obstacles which can be seen to be rooted in socio-political factors. There was no mention of these by the participants in the UAE.

This interest in the country and its society by participants in Saudi Arabia was emphasised to an extent by the disappointment expressed in the lack of information given to delegates about the places they were visiting and the lack of opportunities not only for

exploration of local areas of interest and heritage, but also simply for exploring the places by shopping or walking around. The closed nature of the society experienced by participants also served to justify certain elements of the negative image participants had held before visiting. These factors will be explored in more detail in the next section, which focuses on the barriers to development of the industry in Saudi Arabia and the resistance that participants in the survey perceived towards them being there.

Although an understanding of the image held of the kingdom is important in considerations about the KSA's potential to become an international conference destination (it being likely to have a significant influence on delegates' decisions to attend), it is also important to focus on visitors' actual perceptions of the country based on their experience. A recurrent theme in their responses was the 'closed' nature of society in Saudi Arabia, and the lack of access to places and people. Both Dora and Flo commented on the lack of access to local people, saying how much they would like to be able to meet them. It seemed that, for some interviewees, their negative image of the country was explained and justified to some extent by how closed the country was. Pedro, after his first 24 hours, said:

‘My contact with the city has not been that much but I think it's more closed than I expected.’

Sally concurred with this opinion:

‘SA is a difficult country. It is closed; you don't know what's happening behind doors. Everything happens behind walls and to get into the circle is not easy.’

However, she did add that over the course of her visit, she thought that people became more relaxed and seemed more open to foreigners.

Two delegates pointed out that the atmosphere in Saudi Arabia would be a hindrance to attracting foreign visitors when compared with competitor countries in the region. Sally formed the impression that the atmosphere in Jordan, for example, ‘is much more open, much more relaxed and the environment is totally different.’ Pedro echoed this sentiment by saying ‘[t]hey [the KSA] have very closed customs, so I would rather go somewhere

else.’ He said in Dubai his wife was able to move around freely but that he would not feel so easy about his wife being able to do things in Saudi Arabia.

The perception that the society was closed to them was reinforced by the lack of information given to them about the destination and the lack of pre- and post-conference tourist opportunities for delegates, as well as opportunities for visiting the destination during the conferences. There was a general feeling among most participants that there was a lack of information on both the conferences and the tourist opportunities. Conference attendees often want to explore the local area (Breiter and Milman, 2006, Rittichainuwat et al., 2001), and both Pedro and Nick commented on this. Nick pointed out that conference tourism is quite high-value tourism: ‘it is a good thing about conferences that you get people coming to go and be tourists... often people going to conventions spend more on average than leisure tourists’; and Pedro expressed the view that ‘people who attend are interested in discovering the destination where the conference is taking place and doing activities in that destination, prior to and post the conference.’ However, it was noted that the hotels lack information and programmes for visiting local heritage sights. Flo protested that ‘[t]hey do not know - they don’t have the sort of programme available to let me as a single person, perhaps go to Albalad [the old city] and have a look.’ Sally also commented on the lack of local tours and programmes and the lack of information available, saying, for example, that ‘... they are talking about Jeddah, but we haven’t seen anything of Jeddah.’ Nick also complained about the lack of information, stating his opinion that ‘this is a real problem’; he pointed to the fact that his wife was very interested in looking around and going on a tour around the city but had not been able to do so.

Nothing was said about tourist information by the UAE delegates. However, considering that the UAE is a tourist destination anyway, this area is unlikely to be problematic. Similarly, with regard to information about the actual conferences, nothing was said about a lack of this. Jago and Deery argue that it is important that delegates have the time and opportunity to explore the destination and that one way of doing this is through providing delegates with useful tourist information (Jago and Deery, 2006); Ortega and Rodriguez found that international tourists attributed great importance to being given information (Ortega and Rodriguez, 2007). The data clearly indicates that participants were very curious about Saudi culture and heritage but were met with a blank wall when they tried

to obtain information or assistance to learn more about it or even to visit heritage sites or interact with local people. The frustration experienced by foreign visitors in the KSA as opposed to the UAE epitomizes the inherent contradiction between a policy which permits international visitors and yet does not open up local areas to those visitors.

Significantly, although comments were made on the closed nature of Saudi society, only one participant expressed an opinion regarding the reasons for this. Pedro believed that the KSA government wanted to maintain Saudi Arabia as a closed society and that therefore the political will to open the country to foreign visitors was absent:

‘I think it has the potential but not the political will... All the ingredients are there, my only question mark is - do they really want to or not? ... It depends on what the Saudi Arabian government wants it to be.’

He believed that the KSA government is more interested in religious tourism than conference tourism: ‘Saudi Arabia right now is focusing on religious tourism and my impression is that Saudi Arabia is not interested in opening tourism to other areas. They rather want to preserve the type of tourism that comes for religious reasons - and that’s a lot, because Muslims around the world have to come to Saudi Arabia for the Hajj, so that’s an important flow of tourism but it will very much depend on what the government’s real intentions are.’ He felt that the KSA may not want to welcome western tourists:

*‘I’m not sure that people are welcoming foreign tourists from the western world. They welcome perhaps, tourists from the Islamic world. They are very cautious, kind, but I am not sure that they make you feel that they want to welcome conferences.’* (Author’s emphasis)

These comments by Pedro seem to encapsulate the participants’ awareness (whether conscious or subconscious) of an ambivalent attitude towards them. On the one hand, they had been invited to a conference in the country, but on the other hand, they felt they were not whole-heartedly welcomed. This conflicts with the importance Crouch and Ritchie found was given to the extent to which the host community excels in welcoming visitors (see 3.3.1.ii) (Crouch and Ritchie, 1998). Pedro’s opinion also points the way to a

socio-political factor (the ambivalence towards western visitors) that would impact on the kingdom's potential to become an international conference destination (see objective 2).

This sense of ambivalence in Saudi Arabia was also commented on when marketing was discussed. Pedro said he sensed that Saudi Arabia was not committed to promoting this industry:

‘I am not sure if Saudi Arabia has the desire to promote itself as an international conference destination.’

Nick shared this impression, wondering whether Saudi Arabia aspired to being promoted. This is significant as the lack of any intention or of specific goals would undermine any efforts to develop the industry. It is also significant in the way that the constant focus of attention on the culture, the closed nature of society, and the sense of there being no real intention to open to outsiders, meant that delegates in the KSA gave limited attention to more concrete and practical considerations, in contrast with the more tangible concerns, such as cost, the development of human resources and environmental issues, focused on by delegates in the UAE.

An additional factor which had a negative impact on participants concerned entertainment provision. As far as the entertainment provided at the actual conferences was concerned, two delegates expressed satisfaction with this, with Flo describing it as ‘superb’ and ‘genuine’ and offering ‘first-hand experience of the Saudi culture’. However, the main cause for concern seemed to be the lack of things to do outside the confines of the conference itself. Sally complained about ‘the lack of entertainment and social activities’ and Pedro agreed with this, saying:

‘I think the conference facilities need to be joined with social activities ... I think that is one of the weaknesses in Saudi Arabia. What are the additional things you do besides the conference? Am I going to stay 3 or 4 days in the hotel, especially if I'm coming from far away?’

Nick supported Pedro's remarks by saying that ‘the entertainment at the conference is always quite good, but there wasn't anything organized away from the conference’ and Pedro again made connections with the wider socio-political picture, linking the lack of

social activities with restrictions in Saudi society which he said would restrict him from doing the (unspecified) ‘types of things I do in other destinations’. The results from the quantitative data help to create a bigger picture of this area, with more than half the participants saying that the entertainment factor would negatively impact on their decisions to attend conferences in the KSA. As destinations compete to attract visitors, the provision of extra-conference opportunities is an important factor in the development of this industry (Yoo and Chon, 2008; Rittichainuwat, 2008; Zhang, Leung and Qu, 2007; Crouch and Louviere, 2004), and, as discussed in chapter three, it is often the case that the further away from ‘home’ the meeting is, the more likely it is for it to be packaged around the destination (in terms, for example, of theme events based on the special characteristics of the host region, or pre- and post-conference tours) in order to enhance attendance (Hiller, 1995). The lack of such provision in the KSA could significantly affect its potential to succeed.

Very little was said by delegates in the UAE about entertainment (which *is* accessible outside the confines of conferences in the UAE, an established leisure destination), suggesting either that this area was unproblematic or that it was not important to them. Darren said his overall impression of the Emirates was that it was ‘outstanding’ and ‘a wonderful business and holiday destination’. The author is aware that Dubai in particular is considered by some to be an excellent holiday destination because of the standard of hotels and the quality and range of entertainment offered; the results from the quantitative data, when almost three quarters of respondents said the entertainment factor was a positive influence in their decisions to attend conferences in the UAE, adds an extra dimension to what delegates in the UAE said. Only Keith criticised the *type* of entertainment available at the conferences for not being culturally authentic (he described entertainment in Dubai as lacking ‘class’ and ‘soul’). There is a definite sense, however, that the area of leisure, particularly with strong links to cultural experiences, is important to people visiting the region and the lack of opportunities to do this could clearly impact on Saudi Arabia’s potential to attract international visitors.

Darren made a positive evaluation of the social activities in the UAE, describing them as ‘excellent’ and pointing to the dinner in the desert (for the leaders of MPI) as being a ‘great’ experience’. Keith, however, was less positive about the social activities offered, saying he was only happy with some of them and describing them as ‘limited’. In

response to a question asking what he, as an international delegate, expected the organizers to offer, he said he expected a variety of good quality cultural events. When discussing previous experiences of conferences in the UAE, he said that the first conference he attended in Dubai was filled with events he thought were great, but then realised, at the second conference, that these were repeated, which he found boring and which made him think there would be little point in returning.

In many respects, the culture can be seen to be a significant ‘pull’ factor in attracting people to visit the country. However, it seems that, in the experience of these study participants, what attracts them to visit is, frustratingly, denied them when they do visit; there are barriers placed in the way of them exploring the country and its culture, and barriers to them gaining access to the authentic Saudi society. Ironically, it is probably the existence of such barriers which creates the image of mystery and fear that seems so attractive about the country in the first place. Interestingly, comments made by the delegates in the UAE tended to focus on practical aspects of the country and their experiences there, whereas delegates in the KSA tended to remain focused on the culture and the closed nature of the society there.

A final factor arising in the data which was clearly rooted in Saudi socio-political issues, and which was commented on in detail and with emotional force, was that of gender segregation and the implications of this for conference delegates. The practice of gender segregation during the conferences, alongside the uncertainty over how women are expected to behave and how they might be treated outside the confines of the conferences, can be seen to have the potential to impact on decisions to choose Saudi Arabia as a conference destination, and, therefore, on the feasibility of the KSA developing the meetings industry.

Surprisingly, the majority of comments concerning the expectations of women outside the confines of the conference were made by the two male delegates about their wives. Their concerns appeared to be based on a very definite image of what the expectations are regarding female behaviour in Saudi Arabia, particularly the image held by their wives, and ranged from a focus on the freedom of their wives to move around, to restrictions placed on how they dressed, to uncertainty over the rules and regulations governing women’s behaviour in public places.

One of the main themes of the two men's responses was image. Although Nick held a generally positive image of the KSA, he noted that his wife did not, and that, unlike most of the delegates, who reported that their image of the country had improved as a result of their experience of it, his wife's did not change during her visit. He attributed her negative image to fear, saying that, especially with women, it might be difficult to convince them that Saudi Arabia was a safe place to visit. With regard to his wife, who was on her first visit, '... the image of Saudi Arabia was a bit scary ... she probably felt unsafe.' Nick reported that these issues probably led to 'my wife telling me that she wants to go to Abu Dhabi rather than stay here.' Similarly, Pedro negatively compared the freedom his wife had to 'move around freely' in Dubai with the lack of freedom there was for her to do so in Saudi Arabia: 'If I go to a conference in an attractive destination and I want to bring my wife with me, so she enjoys herself while I'm doing work, I don't think I would do this in SA'. Indeed he and his wife had decided that she would not accompany him on this trip as a result of her fears and discomfort regarding possible restrictions on her. He felt she would feel 'uncertain' and 'intimidated' because of a lack of familiarity with the norms of female behaviour and what was appropriate in certain settings and that she would be 'fearful' of breaking the rules. He expressed his view that 'I think that would make people hesitate to come with their family'. It is possible, if not likely, that the discomfort experienced by Nick's wife may also lead to him thinking twice before visiting the KSA again. No research has been found into the role that spouse attendance may play in the decision to attend a conference (although in 1987, Abbey did say this was a fruitful future area of enquiry) or into the extent that spouses do accompany delegates to conferences in international destinations. One implication of accompanying spouses, however, according to Denny and Lothar, is that the participation of partners would probably mean that more importance would be given to amenities and other-than-meeting attributes in the decision-making process (Denny and Lothar, 1994), attributes which, as discussed above, participants in this study have been dissatisfied with.

Nick commented that his wife 'felt a little bit affronted by having to be dressed in a certain way.' However, none of the female interviewees focused on this factor, even though they were required to wear an *abaya*, a long, loose, black gown worn over normal clothes, at the conferences. They were not required to wear a headscarf or a veil. Surprisingly, it was an Egyptian woman rather than a western woman who raised the issue of the 'dress code for ladies' and said it was a problem for her, in response to the

open-ended question 19 in the questionnaire (see 5.4.3). Responses to question 19 on the questionnaire elaborate on the difficulties facing female visitors to the country, from travel restrictions to the necessity for male escorts. As explained in Chapter One, it is compulsory for a woman to be escorted by a male when she visits SA, in order to get a visa, and in terms of travelling around, as she cannot drive herself.

The female participants in the study did not focus on their experiences outside the conferences, but on issues that arose that were directly connected to the conferences. Although some of these issues are directly connected to the capacity of the kingdom to host international conferences (and therefore are relevant to the next section, which is concerned with data connected to the first objective, dealing with the kingdom's capacity) they are included here because they clearly result from a very definite social (and religious) feature that would impact on Saudi Arabia's potential to develop in this area. See 4.3.2 for a clear explanation of gender segregation at the conferences in the KSA.

Three of the five international delegates interviewed experienced strong reactions to gender segregation. As far as Pedro was concerned, 'There are things in this conference, which I have seen for the first time ... the separation between ladies and men. To me that was a bit shocking, because I'm not used to it.' It was not just the western delegates who criticized segregation; a Bahraini man also complained about the 'unnecessary segregation of female and male participants'. Sally also had a negative reaction to being segregated: 'I feel I am in a gate. This is artificial.'

Segregation was also seen to act against one of the main purposes of conferences: the opportunity to network with other people in the field (Yoo and Chon, 2008; Rittichainuwat, Beck and Lalopa, 2001; Zhang, Leung and Qu, 2007; Jago and Deery, 2006) (see 3.2.2.). Sally explained how gender segregation disadvantaged her as a female delegate, '... because I would like to have contact with some of these interesting businessmen as well. Nothing against women. They are just half of the world.' This was echoed by a Canadian woman in response to question 19 on the questionnaire: 'The men have experienced greater networking opportunities.' As there were fewer women than men at these conferences, and as men are more likely to be in senior positions within organizations, women are more disadvantaged by not being able to converse with men than men are by not being able to converse with women.

Sally also complained that the segregation in the conference room acted to restrict women's view of the speaker on the platform: 'The segregation between men and women at the conference means you see just half of the view.' The situation in the conference room was that men and women sat on either side of the room separated by a transparent partition. In the author's experience of this conference, the chairs, lectern and microphone on the platform were positioned towards the men's side of the hall so women could not see the speakers very well. In addition, the ushers stood at the ends of the rows of seats alongside the partition, thereby restricting the women's view even further. The Canadian woman mentioned above also complained that: '[t]he men have also had access to better views. The women had constant streams of people walking in front of them because of the way the seating was arranged'. As discussed in chapter three, one of the main reasons that people attend conferences is to gain up-to-date information in their field of interest (Rittichainuwat, Beck and Lalopa, 2001; Jago and Deery, 2005). Where someone is unable to see the speaker, communication is less clear so it is harder to comprehend the information being transmitted. Thus, the physical arrangement of gender segregation disadvantages women in one of the most important areas, making the conference less worthwhile for them than for their male counterparts. This may help to explain the small proportion of international delegates who were women that the author observed at both conferences in the KSA. Nick noted that '[m]any professional conference organizers are women and they might have a natural bias against coming to SA because they don't feel comfortable there.'

Nevertheless, the picture was a mixed one. In the author's experience, gender segregation is more relaxed in Jeddah than in other parts of Saudi Arabia, such as Riyadh. In conferences in Riyadh that the author has attended, there has been total gender segregation: male and female delegates are in separate rooms, the speakers are mainly men and they address a male audience; the female audience has to be content with viewing the proceedings over a video link in their hall; women can ask questions of the speakers through a microphone, but the speaker cannot see them, as there is no reciprocal video link in order that the men cannot see the women. Sally, who was comparing the Jeddah conference with other conferences that she had attended in SA, realised that the segregation was more relaxed in this conference: 'I think they are trying to make it easy for women. We are not sitting one mile off and there is a link.'

Flo also expressed the opinion that an advantage of gender segregation was that women-only discussion groups can be more dynamic than mixed groups and allow women to express their ideas more freely. 'The energy that exists by being with a group of women is something that is so special. It is not fashionable in the western world to talk about gender differences in that way, but it is something quite real the energy that women bring together when they meet together. They bring a good network. They are very good at accepting each other. They come up with different ideas, and then turn these ideas into action very quickly. So I think having a women's section is like an incubator full of great ideas.'

Although women at this conference were not completely separated from the men or from the speakers, so segregation was not as complete as it could have been, and although one female delegate at least appreciated some of the benefits of segregation, it is difficult to ascertain whether these concessions would be enough to satisfy future delegates, or whether the facts of gender segregation – and general attitudes towards women and expectations of them – would still pose a distinct barrier to the development of the international (rather than regional) meetings industry. A comment from a UAE delegate regarding his view that people may hesitate to come to the UAE because of a misconception about the role of women there does suggest that the reality of gender issues in Saudi Arabia would serve to deter people from attending conferences there.

Evaluations by the three representatives from the UAE conference regarding women were concerned with the participation of women as speakers, participants, and/or organizers, in the field generally and in those conferences specifically, rather than to restrictions they might face. Only Duncan said that from both a local and an international perspective, the participation of women was good. He did also say, however, that one of the reasons people might hesitate to come to the UAE concerns misconceptions regarding the rights of women. Keith stated quite simply that participation of women was 'not enough', whereas Darren noted that women did not participate as leaders and expressed the view that some westerners perceived that women were obliged to play lesser roles and that this was problematic for them. No other comments were made about female participation or any difficulties women might face staying in the UAE, reflecting the more liberal attitudes towards women in that country and the greater freedom they enjoy than in Saudi Arabia.

### 6.3.2 Delegates: a Focus on Capacity

Analysis of the data led to it being broken down into a number of themes which were more closely connected to practical aspects of conference provision than to social, political or cultural aspects. These themes (ranging from the infrastructure, to visas, to facilities, to the organisation and management of the conferences) were then broken down into two main areas: the first was concerned with aspects of the provision that were connected to the large scale capacity of the country to host international conferences (whether there were, for instance, adequate airline links); and the second was concerned with the more small-scale level of practical organisation of the actual conferences (including, for example, technological equipment and facilities, as well as the organisation of content and speakers). The information given, and concerns expressed, regarding factors in the former group are given priority as they need to be in place and functioning before the latter group of factors becomes an issue. This section addresses research questions:

- 1.i What is perceived as being positive / negative about current provision of international conferences in the KSA?
- 1.ii How is the KSA's capacity to be an international conference destination perceived?
- 3.i What is perceived as being positive / negative about current provision of conferences in the UAE?
- 3.ii How is the UAE's capacity to be an international conference destination perceived?

Most of the data concerned with the large scale capacity of the KSA to host international conferences focused on the infrastructure and on visas. With regard to visas, one specific way in which the regulations imposed by the Saudi authorities impacted on the delegates was in the difficulty that many had experienced in obtaining a visa. All five of the delegates interviewed agreed that visas are an issue in Saudi Arabia. Nick described the 'issues' he had in coming to Saudi Arabia 'because of the visa needing to take longer'. He said: 'I was leaving last Saturday but it wasn't until 10:00 on Friday night when I got my

visa. That was a bit tricky'. Dora had a similar experience of difficulty in obtaining her visa and Pedro expressed the view that 'obtaining visas in SA is not an easy task'. Flo, always the exception to the rule, found it easy to obtain a visa: 'I am so happy to say that I've found it very easy to obtain a visa'. She explained this by stating that she was fortunate that she has 'a good relationship with the Saudi government so maybe I'm an exceptional case'. At the same time, she believes that 'there are many people who find it difficult to get visas, both men and women'. The experience of applying for a visa was an unpredictable one. The Swiss journalist, Sally, had had a different experience this time obtaining her visa, saying it was 'very easy', whereas Nick had had the opposite experience of finding it harder: 'It used to take 48 hours but ended up taking a week. I do not know why'. Pedro believed that difficulties in obtaining visas might deter people who want to visit the KSA for a conference: 'If people who want to come for the conference don't get visas easily, then they will say we would rather not to go.' If the difficulties with them are significant, the people deciding to attend conferences in the KSA (or in any country that may have such strict visa requirements) may be deterred from attending. The quantitative data, as discussed above, gives an illustration of the negative impact visa regulations had on decisions to attend (see 5.4.3). The interesting point about visas, however, is that there are millions of Muslims visiting Saudi Arabia every year (for religious pilgrimage purposes) so the system is clearly capable of processing applications for huge numbers of visas. The question then concerns the reasons behind the slowness or unpredictability of the system for processing visa applications for western visitors, and it seems that the reason may lie in socio-political factors and, again, in the resistance of the country to opening up to non-Muslim visitors.

The fact that the kingdom has the capacity to cater for huge numbers of visitors every year was commented on by Nick, who emphasised Saudi Arabia's capacity and capability to provide for international conferences with large numbers of visitors by highlighting the fact that the country is responsible for providing for the largest influx of visitors of any country in the world:

'Saudi Arabia is already the largest convention destination in the world, because it handles the Hajj. You could claim that they could handle a large number of people at a time. You could change the terms a little bit - the largest place that

handles people coming for special purposes for a short period of time. In some ways that is true’.

It can be seen from comments on the KSA that there is a general sense of satisfaction among the participants with the standard of infrastructure and facilities provided and its capacity to cater for international conferences in this respect seems to be clear. Pedro was of the opinion that ‘The basics to have a good conference are here. I think SA has a good infrastructure’. He also stated that the venue was good, the location ‘excellent’, and that ‘one of the good things (in Saudi Arabia) is the infrastructure ‘... [it is] already here, rather than having to build new roads.’ With regard to facilities, some of the interviewees considered Saudi Arabia to be a destination with good quality facilities. Sally said ‘when it comes to the facilities, of course, it is better here [than in Jordan].’ Flo held a similar viewpoint: ‘I know speaking with the delegates here, that nobody felt discomfort, and nobody felt a lack of amenities or lack of facilities.’ Pedro summarised his own view by saying: ‘I think Saudi Arabia can be a very attractive country with such facilities, very good infrastructure, and the air connections are good as well’. As pointed out in chapter three, (3.3.2), Lee and Back found that satisfaction with the venue led to satisfaction with the conference (Lee and Back, 2008), a factor which the Joint Meetings Industry Council also confirmed when it pointed to the importance of services and facilities reaching international standards. The quantitative data indicated that most participants found the facilities at the conferences they attended in Saudi Arabia to be ‘just about right’ (that is, neither under-, nor over-developed).

However, not all comments were unequivocally positive about the standard and capacity of the infrastructure, amenities and facilities. Contrary to what Nick said, Flo felt that Saudi Arabia lacked infrastructure: ‘just some lack of infrastructure, of simply roads’. Whether she commented on this because she had had reason to travel around Saudi Arabia (because of her ‘good relationship with the government’?) and had therefore experienced the road infrastructure outside the usual international conference centres is not known. Despite Nick seeing that the KSA had a great capacity for handling large numbers of visitors, and despite him believing that its infrastructure was superior to that of Dubai, he nevertheless did point out that ‘[i]n order to do well, you need good transport

links, cheap transport, a relatively good connection to the whole world' and said that in this respect, Dubai was in a better position than the KSA because it has two airlines.

The general level of satisfaction expressed with regard to the infrastructure and facilities in Saudi Arabia is not so unequivocally expressed as it is in reference to the infrastructure, facilities and amenities in the UAE, comments about which were full of praise and unambiguously positive. Duncan described the infrastructure in the UAE as 'outstanding' and 'top-notch', saying one of the things attracting him to attend conferences there was the quality of this infrastructure. Darren also said that one of the main strengths of conference tourism in the UAE was that it had a strong infrastructure, with 'numerous great hotels and convention centres'; he pointed specifically to Dubai as having an image of 'very strong infrastructure development'. In the UAE, all comments made by Duncan on its location and accessibility were positive. He described the airlines as 'outstanding', and said the UAE was in an 'ideal geographical location'. Keith noted that the UAE 'has all the facilities' and that they were 'extremely good' and Duncan reiterated this by saying that in comparison with neighbouring countries, they were well-developed and that he viewed the UAE as an 'excellent' conference destination.

Other issues connected to the large scale capacity of Saudi Arabia were only touched on briefly by participants but included marketing and the workforce. Dora believed that for Saudi Arabia to be a global leader in convention tourism, it needs 'the right marketing,' and urged the Supreme Commission for Tourism to do more about 'marketing the destination for conference tourism'. Sally criticised the media coverage of the conference, comparing it to the summit of the Arab League in Riyadh the previous year and saying that it 'was much better organized there.' Nick, on the other hand, concurred with Pedro's view that the country was not committed to promoting the industry but also added his doubts that they had skilled people to do this: 'Conference marketing is a very specific and reasonably complex task and generally needs some skilled people to do it and I'm not sure if those people are available in Saudi Arabia at the moment.' These points touch on the suggestion looked at in chapter three (3.3.1.i) that deep-seated perceptions of a place can persist (Bradley, Hall and Harrison, 2002), the implication being that conference attendees need some kind of (positive) image to base their attendance decisions on, much of which would come from marketing.

Nick's comment above regarding the lack of skilled marketing people was in contrast with comments made on the marketing of the UAE, which were constructively critical, focusing on the necessity to sustain and develop their strategies in order to achieve global leader status. Duncan pointed out that although he could see that the UAE is well-promoted, he did not consider efforts to promote it to be cohesive (in the sense of Gulf countries working together as one region); he argued that because organizers decide on a region first, the GCC (Gulf Corporation Council) needs to work together to promote the region rather than focusing on individual efforts to promote, for example, Abu Dhabi, Dubai, Doha, Bahrain, and so on, separately. Darren's view on how well the UAE is promoted as an international conference destination was that the current promotional methods are good but need to be sustained seeing as the position of the UAE in the world meeting market was in a process of rapid growth; when asked whether the UAE has the potential to become a global leader in conferences, he repeated that they needed to continue to promote the country. This is in sharp contrast with the impression that there was little, if any, marketing of the KSA, and with the doubts expressed over the existence of a skilled workforce - doubts which were also expressed regarding the professionalism of the organisers of the conferences in the KSA. Dora criticized the organisers, saying, '... you need to have very professional conference organizers who know what they are doing' as well as suggesting that the conference organizers in the future be Saudis. Sally also complained about the lack of accessibility of the organizers: 'The organizers are not visible enough. There should be a list to be able to have contact with them either now or later. I have to search for them.' Flo took a different stance by looking at what she thought was behind the difficulties they seemed to be having:

'There is a sense of them battling against regulations - they never complain, they are very courageous and very generous, but I get the sense they've got difficulties with the regulations of tourism.'

These latter points indicate a need for attention to be paid to the requirements for a suitably skilled workforce in the industry, particularly in light of Whitfield's finding that customer-oriented staff and high levels of service are the most important services offered by venues to delegates (see 3.3.2) (Whitfield, 2005).

As far as the small-scale level of practical organisation is concerned, generally, comments on the technical support at the conferences were positive and negative comments were reserved for issues of timing, and the content and coherence of the conferences. Technical organisation of conferences (that is, provision of quality lighting, sound systems, translation systems, and so on) hosted in Saudi Arabia was positively evaluated by three of the interviewees.

Flo described the conference as being ‘superbly managed’ and Sally commented on how professionally the conference was presented: ‘I like the way they present it. It is quite professional. I was here last year, but this is a bit special.’ Flo evaluated the convenience of the conference venue positively: ‘It is a very comfortable venue. Easy flow of people. It is in a central part of Jeddah. It is exceptionally well organized. Very high technical level.’ The results of the questionnaire analysis illustrate the high level of satisfaction with the practical organization of the conferences experienced by delegates in the KSA, although other comments made in the interviews elaborate on the possible reasons for the dissatisfaction expressed by the small minority. Nick, in the interview, expressed only lukewarm satisfaction with the conference organization: ‘It is reasonably well organized and the operation of the conference is good.’ Speaker selection is one of the most important elements in a successful meeting and Flo drew attention to this area by expressing her belief that Saudi Arabia ‘has attracted an exceptional panel of speaker’s...And could draw from around the world a very exceptional standard of speakers and of experts because they have the wealth to spend on paying for those big names.’ Sally, however, complained that although speakers focused on a range of different issues, there was not enough depth: ‘They talk a lot about different interesting issues without really going into depth. As a journalist, I could not make anything out of it. They jump from one issue to another. There are a lot of interesting issues - why not focus on one and go into depth?’ Pedro implied a lack of coherence and focus in his experience, saying that he felt the topics were not well coordinated: ‘Many aspects of it are quite similar to the way international conferences are organized but I also think conferences from the beginning are probably better planned in terms of what you want to achieve - get the right speakers, try to have a clearer vision on the topics that the speakers are going to cover so they complement each other. Nobody really knew what I was going to talk about. I could have spoken about something other speakers could have covered exactly.’

He pointed to the lack of information given to speakers prior to the conferences, and, by implication, the lack of tight organisation:

‘I was to come just 10 or 15 days ago and there was no detail about the programme, the content. They asked me for an abstract without telling me what the conference was about in more detail, how the sessions would be organized, in what session I would speak ... It took me some time to get the information, which forced me to work at the very last minute. I was working in the plane to produce my presentation. So I think there is room for some improvement.’

Dora echoed Pedro’s concern regarding the lack of information that is passed onto attendees prior to the conference, but focused on the necessity of informing delegates what to expect in terms of the arrangements for gender segregation:

‘Segregation needs to be addressed in a proper manner for delegates coming from another country. They need to inform speakers and delegates beforehand of the procedures and how everything will work - that men and women will be separate, that functions will run separately.’

Flo, who was pleased with almost everything in the KSA, also referred, however, to the lack of information in the hotels: ‘When I arrived at my hotel, they had no information about the forum.’ Nothing was said about tourist information by the UAE delegates. However, considering that the UAE is a tourist destination anyway, this area is unlikely to be problematic. Similarly, with regard to information about the actual conferences, delegates in the UAE did not comment on an absence of this.

When organizing a meeting, most planners pay careful attention to timing. However, Pedro also believed that ‘the timing is not running very well’ and, interestingly, in one response to question 19 in the questionnaire, one person did comment on the amount of protocol and formalities which took up a great deal of time, which may have been responsible for delays.

Unlike the views expressed about the conferences in Saudi Arabia, no negative comments were elicited concerning the organisation of the conferences in the UAE (with regard to timing, the type of speaker, the organisation of themes and talks, and so on). Jago and Deery’s finding that organization was rated highly as an attribute of successful

conventions (see 3.3.2), and Davidson and Cope's assertion that venue staff should be able to draw on '...first-rate organisational skills' indicates a need to ensure consistency in standards of organisation and quality in terms of staff service (Jago and Deery, 2006) (Davidson and Cope, 2003:109).

Clearly, in certain ways, there is the capacity for Saudi Arabia to organise high quality international conferences, as was demonstrated to the author by her experience of the JEF conference, and as the delegates' comments attested to (even if there are still issues with the conference that need addressing). Nick commented that the ability to tightly control conference tourism suited the closed nature of Saudi society, which he described as having the potential to be 'quite organized and controlled to a certain extent.' The problem is, however, that if there are also conferences that are not of the required standard, then it will be these that create a negative image of Saudi Arabia as an international conference destination, and once this image is created (and each time it is added to), it would be very difficult to change it.

#### **6.4 Conclusion**

The results of the analysis of the interview data address primarily the second objective of the study; the wider social and political context in Saudi Arabia can be seen to impact on a number of factors that would affect the development of the industry. The most pronounced socio-political factors arose in comments regarding the cultural reservations held by the country towards opening up to foreign (that is, non-Muslim) visitors and ideas.

The lack of clarity over whether or not to welcome international visitors translated into a range of dilemmas, with regard to the provision and organization of conferences and to the accessibility of the culture. Complex bureaucratic authorization procedures and visa requirements arise from the necessity to control the themes of conferences, who enters the country, who speaks at conferences and what ideas they might bring that challenge the status quo. The unacceptability of certain themes and speakers would be bound to limit interest in the kingdom as a destination. Ambivalent attitudes towards opening up to the

outside world impact on the extent to which practical steps can be taken, on the one hand, to create investment and development opportunities through partnerships with businesses outside the country, and, on the other, to build conference centres to cater for the effects of such investment. Difficulties in marketing the Kingdom as a potential conference destination (and working to create a more positive image of the kingdom) arise from the lack of clarity about welcoming foreign visitors, which is then translated into a lack of information when visitors do come about what they can do, where they can go, what they can see. Deeply ingrained attitudes towards women and female participation in public life mean that women are invited to conferences but have more difficulties than men as far as visa requirements are concerned and at the same time fewer opportunities than men to actively participate (as speakers, organisers, participants). Ambivalence towards not only foreign, but female, visitors is clear.

Officials pointed to difficulties created by the systems for granting visas; delegates similarly confirmed a lack of transparency, ease and consistency in the system for gaining them. One official pointed to the potential for difficulties if the status quo with regards to women were challenged; similarly, delegate comments indicated a fear in female visitors of inadvertently challenging the status quo and of what the repercussions of this might be. The main pre-occupation of delegates, however, was the intrigue and exoticism of the culture (fuelled, no doubt, by the sense of it being ‘out of bounds’ to them, and possibly by the position of women in it). Their frustration at the sense that the society was closed to them, that no information was provided, that there was very little opportunity to ‘experience’ it, perfectly reflects the ambivalence that was so apparent in the data gained from the officials.

The lack of openness to outside influence, so apparent in the interviews with delegates and officials in the KSA, does not arise in the data taken from the UAE. Clearly apparent in that data was an unambiguous openness to (and lack of regulatory restrictions on) not only outside visitors, but the ideas and knowledge that conferences would contribute to the country.

Results from the interview data also to some extent address the first objective of the study, aiming to assess the capacity of Saudi Arabia to host international conferences. Overall, both delegates and officials expressed general satisfaction with the infrastructure,

facilities and technical support already in place or available to support the industry, and the capacity of the kingdom to cater for large numbers of visitors. The geographical location of the kingdom was considered advantageous, as was the belief that the Saudi market was very attractive to international companies and businesses. Assessment of different aspects of the conferences in the study (with regard to gender segregation, timing, organisation, technological support and venue) were mixed – neither significantly negative nor positive. Unlike the UAE officials, who were aware of the need to develop their human resources, only the delegates in the KSA expressed doubts over whether Saudi Arabia had the skilled people necessary to organise and manage conferences and to market the country as an international conference destination. However, despite the fact that there seemed to be a number of difficulties that would impact on the kingdom's capacity to develop this industry, the movement to work on the regulatory systems and to increase cooperation between the various official bodies, as well as the success experienced by Jeddah in the industry, were seen as indications that difficulties could be overcome. The extent to which overcoming difficulties is dependent on changes in socio-political attitudes and systems needs to be assessed.

The results of the data from the officials and delegates in the UAE address the third objective of the study by illuminating the factors that support and inhibit the Kingdom of Saudi Arabia's potential to be an international conference destination. The overall impression in the UAE was the strong sense of commitment the country has towards developing conference tourism, which immediately clashes with the lack of a committed approach that is so apparent in the data from the KSA; there is evidence of clarity and confidence in the understanding of where the UAE stands, the stage of development they are at in the global and regional contexts, and in their approach to future development. The UAE seem assured of their potential and clearly have government support to achieve it. They see themselves as being more advanced than their neighbours in terms of infrastructure, administration (and the lack of red tape), being tax free and having an open policy to outsiders. Their approach to improving and expanding the industry, unlike that in the KSA, is clearly laid out in a series of steps (guided by clear objectives and benchmarks against which they measure their development and progress) and based on defined strategies. They are aware of the need to maintain active, engaged and strategic marketing and emphasise, also, the work they need to do in the area of human resources, to ensure that the requirements of the industry are met. Neither of these areas are focused

on by KSA officials. The UAE have plans in place regarding the development of transport, infrastructure, leisure activities, and a specific target they wish to reach in the world ranking of conference destinations. They are confident about the contributions women can make to the industry and actively target this sector of the population. Interestingly, their vision of the future is based not only on plans and goals for the UAE, but widens to incorporate the entire Gulf region; there seems to be an awareness that all countries would benefit from cooperating in the development of this industry.

Clearly, the contrast between the two countries can be attributed to the fact that the UAE, unlike the KSA, already has an established conference industry, and is a recognised leisure destination. More importantly, however, the UAE's openness to the outside world seems to have left them free to focus on developing the industry and this seems to be the main difference between the two countries. The KSA seems to spend much of its energy struggling with social and political resistance to opening up and it is the conflict generated by this which seems to be forming the main barrier to its development.

## 7.1 Introduction

Saudi Arabia currently finds itself at a crossroads. Whether they want to open up to the outside world economically or not, the process has been set in motion – as pointed out in chapter one, they are members of the World Trade Organisation and no matter how many of its requirements they are willing and able to meet (and how quickly or slowly this might happen) the fact is that they are committed to meeting them and therefore to doing business with the outside world. As King Abdullah says, ‘we cannot remain frozen while the world is changing around us’ (Tunisia/Saudi Arabia Report 2006). Internal imperatives of the growing population, rising unemployment and deep insecurity regarding the extent of their dependence on revenue from oil, all place tremendous pressure on the country to change; regardless of which direction Saudi Arabia chooses to go in, it seems that change is inevitable. In this context, the international conference industry was considered to be a potential means of growth and diversification and the Supreme Commission for Tourism issued a clear statement of intention with regard to its development (see 1.2). In many ways, and taking into account the great resistance on the part of certain groups in Saudi Arabia to outside, particularly non-Muslim, influence, it can be argued that this industry, with its potential to be highly controllable, is eminently suitable for Saudi Arabia in its current situation, enabling them to open up the country in a careful and measured way. It would provide a viable alternative economic source - providing a year-round source of high-yield tourism, encouraging foreign investment, and creating opportunities for people to visit the country and develop business contacts - and it would create employment.

In the light of the above, the aim of this research study was to assess the potential for Saudi Arabia to become an international conference destination, taking into account two different perspectives. One of these, as stated in the first objective, was concerned with the more practical aspects of international conference provision and with perceptions of the kingdom’s overall capacity. The second perspective, clarified in objective two, takes

into account wider social and political factors which might be impacting on the kingdom's capacity to progress in this area. Both of these perspectives were considered in the two analysis chapters, five and six.

This chapter is divided into five sections. The first section presents the key findings from the qualitative and quantitative data in three parts. The first two parts focus on the key findings related to the first and second objectives respectively. Key findings on the UAE which illuminate what might or might not contribute towards Saudi Arabia's potential to develop this industry (see objective three) are discussed at the end of each of these parts. The third part of this section addresses the aim guiding the research, concluding whether Saudi Arabia currently has the potential to become an international conference destination. The second section of this chapter focuses on the recommendations the author makes, based on the findings of this research, with regard to the development of the industry in the KSA. The third section of the chapter discusses the research study's contribution to knowledge. This is followed by an overview of the limitations of the study before the final, fifth, section, in which suggestions for further research will be proposed.

## **7.2 Final Discussion and Conclusions**

This section provides conclusions based on the findings to the three objectives and their respective research questions. The first part presents the key findings regarding the capacity of Saudi Arabia to become an international conference destination (objective 1) and is divided into three sections. The first two deal with research questions 1.i and 1.ii; where relevant, connections are made to the literature. The third section in this part looks at how the findings on the UAE contribute to an understanding of Saudi Arabia's capacity (objective 3, research questions i and ii). The second part presents key findings regarding the socio-political feasibility of Saudi Arabia becoming an international conference destination (thereby addressing objective 2, research questions i and ii). A separate section considers how the findings from the UAE illuminate the feasibility of development in this field in Saudi Arabia (objective 3, research questions iii and iv).

### **7.2.1 The KSA's Capacity to Host International Conferences (Objectives 1 and 3)**

In this section, the key findings related to the first objective - to assess the capacity of Saudi Arabia to host international conferences - are identified and discussed and links with the literature clarified. Data gained on the UAE which illuminate what would support and inhibit the kingdom's potential in this field (objective 3) are discussed at the end of the section.

#### **7.2.1.i Current Provision of International Conferences (Research Question 1.i)**

In response to research question 1.i (What is perceived as being positive / negative about current provision of international conferences in the KSA?) those aspects of current provision of conferences that were perceived positively included:

- The practical organisation of the conferences
- The infrastructure (including transport, hotels, facilities, and technological support)

It was perceived that the KSA had the infrastructural capacity to host international conferences and very good organisational capabilities, which, in light of Jago and Deery's finding that organization was a highly rated attribute of successful conferences (Jago and Deery, 2006; see 3.3.2), indicates that this is one of the KSA's strong points in terms of capacity (see 5.4.3). Similarly, the suitability and standard of local infrastructure was considered to be good (with hotels regarded as excellent, and transport as satisfactory) (see 5.4.3 & 6.3.2). Crouch and Ritchie regarded these areas as important in the meetings industry and Khadaroo and Seetanah, and Schonk as important in general tourism (Crouch and Ritchie, 1998; Khadaroo and Seetanah, 2008; Schonk, 2006). Little research has been carried out, however, into their specific importance in the international meetings industry and also missing in the literature is research into the relative importance of such attributes; the discussion below of the findings related to the second research objective demonstrate that although certain attributes of a destination and conference provision may

be rated highly, when measured alongside other attributes, they may not be significant overall in decisions to hold or attend conferences at particular destinations.

Research question 1.i also led to an enquiry into those aspects of current conference provision that were perceived as negative. Key factors included:

- Gender segregation
- Entry requirements / Visas
- Entertainment

Gender segregation at the conferences had a pronouncedly negative effect on both male and female delegates in terms of its restrictive impact on networking and opportunities to engage (see 5.4.3, 6.2 & 6.3.2). Attitudes and practice regarding the genders was considered by some to have the potential to deter female delegates and conference organisers. The KSA is the only country in the world which implements a policy of segregation of the genders in public and work settings, and no previous research has been carried out into the impact this practice has on people visiting the country for work purposes. The literature (see 3.2.2) does indicate, however, that possibly the most significant factors motivating people to attend conferences include opportunities at conferences to network (Severt et al, 2007; Yoo and Chon, 2008, Jago and Deery, 2006, Zhang et al, 2007), to gain peer recognition (Zhang et al., 2007), to develop a professional network, and to see known people in the relevant field (Yoo and Chon, 2008). Segregation would, in these respects at least, compromise the capacity of the KSA to host conferences of an international standard.

Visa application processes and complex bureaucratic procedures for gaining permission to organise conferences were also shown to be a negative aspect of current conference provision. Entry requirements and procedures placed stress on participants and were clearly considered to have a negative impact on decisions to attend (see 5.4.3, 6.2 & 6.3.2). Research indicates that visas (and ease of visa applications) are considered a factor affecting both the site selection process (Crouch and Ritchie, 1998) and the attendance decision-making process of delegates (Zhang et al, 2007) (see 3.3.3.i and 3.2.2). No

research has been carried out into the effect and relative importance of this factor although this study clearly indicates that the impact is negative.

Limited provision of entertainment was also considered to have a potentially negative influence on decisions to attend conferences in the KSA (see 5.4.3 & 6.3.1). Chapter three points to the fact that although entertainment (as one kind of extra-conference opportunity) has been isolated as a factor influencing the site-selection and attendance decision-making processes (see 3.2.1, 3.2.2 & 3.3.1.iii), no research has been carried out into the relative impact of this factor on these; this research indicates that it has an effect but does not confirm whether or not this could be compensated for by other factors, such as opportunities to experience a different culture.

Although the three factors discussed above had a negative impact on the conference experience of delegates and therefore demonstrate problems with current provision of international conferences, they will be discussed in greater detail below with reference to the second research objective and what they signify in terms of the social and political feasibility of Saudi Arabia developing as an international conference destination.

#### **7.2.1.ii Perceived Global Capacity (Research Question 1.ii)**

Research question 1.ii (How is the KSA's capacity to be an international conference destination perceived?) takes into account participants' perceptions of a range of macro factors which indicate a capacity, or lack of capacity, for Saudi Arabia to be an international conference destination. Perceptions of the following three factors suggest support for the capacity of the KSA:

- Interest in the culture & heritage of the country
- Perceptions of safety
- Improvements in the image held of the country

The literature highlights extra-conference opportunities (involving not only macro opportunities such as travel to desirable locations, but also opportunities for activities

such as sightseeing, entertainment, shopping, and to see cultural and historical attractions) as being important in the two processes of site selection and attendance decision-making (Crouch and Louviere, 2004; Yoo and Chon, 2008; Zhang et al, 2007; Jun and McCleary, 1999; Rittichainuwatt et al, 2001; Severt et al, 2007). This study found that delegates placed a great deal of emphasis on their interest in, and sometimes fascination with, the culture (the ‘uniqueness’, the ‘exotic’, ‘unusual’ nature of the place, the sense of ‘mystery’, the feeling of ‘fear’ ‘excitement’ and ‘interest’ it generated, perceptions of it as being ‘attractive’ and ‘different’) and their desire to experience and explore it (see 5.4.3 & 6.3.1); participants’ interest in the culture and heritage of Saudi Arabia was possibly the most noteworthy aspect of both the quantitative and the qualitative data. This is therefore a distinctive aspect of the kingdom’s capacity to attract people to international conferences there. That so many said they would revisit the country and so many indicated that their overall impression of their visits was very good, suggests a real attraction to the place and a feeling that there are still many things that they would be interested in experiencing there (see 5.4.2 & 6.3.1). These findings underline the validity of both Yoo and Chon’s assertion that delegates see such opportunities as being significant ‘pull factors’ (Yoo and Chon, 2008) and of Jago and Deery’s finding that the perception that a destination is interesting and exotic acts as a considerable motivation to attend a conference there (Jago and Deery, 2005) (see 3.3.1.iii). No research has yet been carried out into the extent to which an interest in the culture of a destination influences attendance in relation to other factors.

The findings indicate that the level of safety at both the venues and the destination as a whole was perceived to be very high (see 5.4.3), this factor being rated more highly than any other in the quantitative data, despite the author’s expectation that the terrorist attacks of 9/11, and their negative impact on the image of Arabs, Muslims and Islam, would have created negative perceptions of safety in the region. No research was found into the importance of this attribute generally in the international meetings industry, although Weber and Chon point to its growing prominence as a critical factor in attracting attendees (Weber and Chon, 2002a). That perceptions of safety in the KSA were so high adds to the perception that the country has the capacity to host international conferences.

The improvement in participants’ image of the kingdom by the end of their visit (see 5.4.2 & 6.3.1) was a further factor indicating the capacity of the country to attract

delegates. Whether the image held of a place is subconscious or not, image is increasingly seen, as argued in chapter three (3.3.1.i), as being tremendously important in attracting or deterring delegates (Zelinsky, 1994). Interestingly, despite the image it seemed delegates had held of the KSA prior to their visits, they clearly had not been deterred by it (although it is impossible to ascertain how many more delegates may have been deterred). Kim asserts that one way to dynamically and positively change the image a place has is to stage meetings there (Kim, 1998) and, overall, the experience of being in Saudi Arabia and attending conferences there served to improve the image many of the delegates held of the country, emphasising the potential for stories to be misleading and for experience to change perceptions. This is reflected in the high number of participants expressing a desire to return (see 5.4.2 and 6.3.1).

Despite the fact that the interest in the culture and the improved image of the country indicated a definite capacity for the KSA to be an international conference destination, certain other factors would act against this development:

- Gender segregation in public life
- Lack of extra-conference opportunities in the wider cultural context
- A lack of openness and welcome towards visitors

Both men and women were negatively influenced by gender segregation in the wider cultural setting. Their experiences led to a range of reactions, including anger at the imposition of a dress code, lack of confidence regarding what was acceptable female behaviour in public, a sense of intimidation in public places, frustration over travel restrictions placed on women, and, quite simply, shock at the actuality of women and men being separated (see 5.4.3 and 6.3.1). The findings indicate that the issue may be as likely to discourage male delegates from choosing the Kingdom as a destination, and from travelling with their spouses, as it is female delegates, and to inhibit organisers, generally, from organising international conferences there.

Although there was a pronounced interest in the culture of the country, there was also dissatisfaction with the opportunities afforded to participants to explore it, which was attributed to a lack of systems in place that would facilitate such opportunities, and a more general perception of ambivalence towards visitors, succinctly summarised by one

official saying “We don’t welcome visitors”. As pointed out in chapter three (see 3.3.1.iii), although Zhang et al added ‘scenery / sightseeing opportunities’ to Opperman and Chon’s (1997) original list of factors affecting the attendance decision-making process (Zhang et al., 2007), and although Crouch and Louvière isolate the socio-cultural setting as an influential dimension (Crouch and Louviere, 2004), no research has been found which measures the relative importance of extra-conference opportunities. More importantly in this context, research would be needed into how much of a deterrent the lack of opportunities would be to revisiting the kingdom and recommending it, particularly in light of the strong attraction the culture and heritage hold for participants. Crouch and Ritchie point to the importance of the extent to which host organizations and communities excel in welcoming visitors (Crouch and Ritchie, 1998) and Zhang et al include ‘friendliness of locals’ as a factor connected to the ‘Attractiveness of the Convention Destination’ in the decision-making process (Zhang et al., 2007); the perceived lack of welcome towards international participants in the KSA would impact on its capacity to attract conference delegates and organisers and to sustain interest in the country.

Two further factors which would have a negative impact on the KSA’s capacity concern:

- Authorisation procedures for holding international conferences
- A lack of focus on policies, strategies and objectives

Procedures in place for gaining permission to organise conferences with international speakers and delegates are deemed by officials to be overly-complicated, inefficient and obstructive (see 6.2). Currently, a number of different bodies and ministries are involved in granting permission and there appears to be great frustration among officials at the fact that no one body has overall responsibility and that change appears to be so difficult (see 6.2). These procedures, alongside complex customs regulations, place constraints on encouraging partnerships with outside businesses, and on developing contacts with people who may wish to organise or attend conferences in Saudi Arabia - and who may be instrumental in developing the industry there. Coupled with this was a distinct lack of a focus on strategies, objectives and policies in the officials’ responses.

Coordinating efforts to develop the industry (deciding on policies, implementing initiatives, changing regulations, facilitating licensing procedures) at the bureaucratic and administrative level seems to be partly where complications arise and a brief review of the literature on the KSA indicates that, in this area, there are widespread and far-reaching issues arising from the great inertia in state institutions when it comes to change and reform. According to Hertog, the political and bureaucratic system in Saudi Arabia is ‘bloated and inefficient’; the government consists of a large number of ‘parallel, impermeable institutions’, often with overlapping jurisdictions, that work in isolation because of the distinct lack of integration and coordination among them (Hertog, 2005:112). Hertog points out that because the country is so hierarchical, horizontal communication and dissemination of ideas and policies very rarely happens; vertical access to those in power at the top (and those who might grant favours) is preferred and there is an extensive range of factions, from royal to bureaucratic to private businesses, that can be given effective power of veto (Hertog, 2005:112). What is missing are coordination, integration and orchestration of policies and procedures for implementation at the top of the system so that a coherent formation of interests and policy can be developed across institutions. With regard to the potential for the KSA to be an international conference destination, the current system means that it is very difficult to coordinate efforts to develop the industry.

The latter five factors, which mitigate against the KSA’s capacity to be an international conference destination, will be focused on in greater detail below (see 7.2.2) when the possible socio-political causes will be discussed.

Three final key findings (which directly address the research objective) indicate doubt over the KSA’s overall capacity to act as an international conference destination:

- Doubts over recommending the kingdom
- Doubts over organising conferences in the kingdom
- Doubts over the KSA’s future potential as a global leader

Although participants felt the conference industry would be a significant niche in the kingdom in the future, when the focus switched to predictions of its success as a global

leader, this future was seen as being distant rather than near (and even then, not unequivocally positive). To a greater or lesser extent, Saudi Arabia is perceived to have the capacity, on a practical level at least, to become an international conference destination – it is considered to be safe, practical aspects such as facilities, organisation, venues, and infrastructure are rated highly enough to suggest its overall capacity to deliver conferences of an international standard, it is well situated geographically and there is a great deal of outside interest in investing in the country and developing business partnerships there (see 2.4.2.iii). The lack of confidence in its future, coupled with the lukewarm reactions on the part of participants towards recommending Saudi Arabia as an international destination and towards organising conferences there indicate doubts about its capacity that are probably based on the implications of problems they have perceived rather than to specific aspects of conference provision. There seems to be far greater faith in the UAE's future potential to be a global leader in this field, both in the short and long term, which could be connected to the higher quality of current conference provision there but similarly could be connected to the lack of hindrances to the development of the industry that exist in the KSA. The next section looks in more detail at the key findings from the data gained on the UAE with regard to its current provision of international conferences and global perceptions of its capacity.

### **7.2.1. iii Current Provision of, and Perceived Global Capacity for, International Conferences in the UAE (Research Questions 3.i & 3.ii)**

This section considers what is positive and negative about current provision of conferences in the UAE (research question 3.i) and how its capacity as an international destination is perceived overall (research question 3.ii); these findings illuminate factors of this country's success which might also be relevant to the KSA's success, or whose absence might hinder it.

A key finding in the research study was that most aspects of the provision of international conferences in the UAE were rated highly (see 5.4.2, 5.4.3 and 6.3.2). The infrastructure, the organization of the conferences and the provision of entertainment opportunities were

all considered to be of a high standard. Descriptions of the country and the conference experience were positive and ‘upbeat’, using strong adjectives: ‘outstanding’, ‘wonderful’, ‘excellent’, ‘great’, ‘extremely good’, ‘top notch’ (see 6.3.2). The image held of the UAE was positive (building a picture of safety, tolerance and ‘normality’ alongside one of efficiency, modernity and high standards) and reflected a high level of satisfaction with what delegates experienced there. Aspects of provision considered to impact negatively on the KSA’s capacity (gender segregation, strict entry requirements, limited entertainment) were not problematic in the UAE. Despite the fact that the UAE and the KSA share the same religion and culture, there is no gender issue in the UAE. Female delegates and speakers would not feel they had been discriminated against because of their gender and this factor would not therefore inhibit them from attending conferences in the UAE. Any comments made by officials or delegates in the UAE regarding women focused on their professional capacities (see 6.3.1), a far remove from the energy and thought expended in the KSA on issues over segregation. In the area of entertainment, also, it seemed that there was a general sense of satisfaction among conference participants with what was available; comments were made regarding the need for more (and a greater range of) culturally authentic activities to be provided but, generally, feedback on entertainment in the UAE was very positive (see 5.4.3 & 6.3.1). It should be remembered that the UAE is as much a leisure destination as a conference destination and has therefore developed the range and quality of the entertainment it provides. That the UAE’s regulatory system is not so strict as the one in the KSA means, quite simply, that it is easier to visit and do business there.

Clearly evident in the data collected in the UAE was the existence of policies, strategies and government objectives concerning the development of the meetings industry there, indicating an explicit and unambiguous commitment to the development of this industry (see 6.2 & 6.3.2). The UAE government not only supports the industry, but has set explicit goals that it requires those in charge of its development to deliver on; there are clearly open channels of communication between the government and those running the industry. The lack of reference from the KSA officials to specific strategies, plans and objectives was not apparent in the data gained from the UAE officials. The UAE have plans in place regarding the development of transport, infrastructure, and leisure activities, in addition to a specific target they wish to reach in the world ranking of

conference destinations (see 6.2). The UAE's commitment is also exemplified in their clear intention to focus on areas that will enhance their standing as a competitive international conference destination (such as, for example, developing a professionally trained workforce). For these plans and strategies to be working (for marketing approaches to be in place, for transport systems to be being improved, and so on), is an indication that the bureaucratic system is fluid and effective – in direct contrast with the top-heavy, rigid bureaucratic systems in the KSA (see 6.2).

Aspects of the UAE's capacity that were rated negatively were not, however, serious enough to be detrimental to the country's overall capacity. One criticism was that the UAE was perceived to be lacking a cultural identity and, as a result, lacking in provision of culturally authentic activities (see 6.3.1). It was also considered to be expensive (see 5.4.3 & 6.3.1). Worries were expressed that because of its geographical position, the image held of it might be similar to those of other Arab countries; there was a concern that this would lead to people believing that there were difficulties working in a Muslim country such as the UAE, that there were issues over women's rights, that there might be political issues that would affect them, and that there might be safety issues – concerns that were evident in the anxiety-inducing image often held of the KSA (see 6.3.1).

However, there was far greater faith in the UAE's potential to be a global leader in this field, both in the short- and the long-term, than in the KSA's. This faith was exemplified by delegate respondents being more confident that they would organise conferences there themselves and would recommend it (see 5.4.2). The findings on the UAE bring into relief those aspects of conference provision in the KSA that might prevent people from recommending it and from organising conferences there and that are therefore detrimental to its success: the perceived lack of welcome towards international visitors, the segregation of the genders both within and outside the confines of the conferences, complex entry requirements, and the lack of extra-conference opportunities. These will be considered in the following section when the findings for the second objective are discussed.

### **7.2.2 The Socio-Political Feasibility of KSA's Development in this Field (Objectives 2 and 3)**

This section will present key findings relating to the social and political feasibility of the Kingdom of Saudi Arabia developing as an international conference destination (objective two, research questions i and ii), and will take into account what the findings from the UAE illuminated (objective three, research questions iii and iv). The key factors and attitudes which the findings show would affect this feasibility bring to the fore negative dynamics within the social, cultural and political set-up of Saudi Arabia that thwart progress.

#### **7.2.2.i Ambivalence in the KSA**

In response to objective two, a key finding from the data gained from both the officials and the delegates with regard to the social and political feasibility of the KSA developing as an international conference destination was that Saudi Arabia was closed to outsiders and outside influence. Saudi officials were aware that the industry was affected by a lack of clarity over whether to open up to foreign visitors ('We don't welcome visitors') and delegates were aware of a strong sense of ambivalence towards them, the delegate question, 'Do they really want to or not?' summing up the sense of uncertainty felt by many delegates regarding the country's intentions (see 6.2 & 6.3.1). In this section, some of the social and political reasons behind the closed nature of Saudi society will be considered as a way to explain the key factors impacting negatively on the capacity of the country to develop as an international conference destination.

In order to maintain domestic security in Saudi Arabia, it has been necessary to ensure that the state and the regime are solid and to do this, three factors have been important: control, acquiescence and 'legitimacy' (Nonneman, 2005: 318). The support gained from security in the domestic sphere (that is, solid support for the state and for the regime) underpins the extent to which the leadership can manoeuvre and be autonomous in the external sphere. One of the traditional criteria for legitimacy of the regime in the KSA is an ability to deal effectively with the outside world and to protect domestic society from 'too much external control, meddling, or influences' by forming a "buffer" between the

two (Nonneman, 2005:318). Henderson recognises that Saudi Arabia's discouragement of western visitors arises not only from a desire to avoid social disturbance (which might destabilise the state and the regime) but also from a belief that there is a fundamental incompatibility between many western ideas and modes of behaviour and the Islamic religion and way of life, an aspect of Saudi culture and society which is cohesive and lends it great legitimacy (Henderson, 2003).

Of particular relevance to Saudi Arabia at the moment is that developing as an international conference destination entails opening the country to visitors from outside the Gulf region, and therefore to a form of international tourism, which Okruhlik argues 'is at the nexus of global capitalism and national identity and, as such, ... provides a powerful vantage point from which to examine the tensions between the imperatives of global capitalism and the protection of domestic jurisdiction' (Okruhlik, 2002:3). Tourism is a powerful driver of 'cultural remaking and reinvention' and tourists and various elements of the tourism industry - peoples, objects, and images - are seen as 'symbols of external influence and cultural change' and as catalysts of 'social change' (Robinson, 2001:35). This is precisely what the KSA has historically wanted to avoid; external influence leading to social, cultural, and political change.

Of particular relevance to this research study, two key factors found to be potential hindrances to the capacity of the country to develop as an international conference destination are gender segregation and entertainment (see 5.4.2, 5.4.3, 6.2, 6.3.1 and 6.3.2). These are, at the same time, aspects of the society there over which control is considered essential. Threats to the system of gender segregation signify a potential threat to the maintenance of the cultural status quo, in which the separation of men and women in all aspects of cultural, social and political life is strictly enforced, and which insists not only that public life is 'the exclusive domain of Saudi men' (Rice, 2004:75) but also that women should not be exposed unduly to 'the gaze of outsiders' (Burns, 2007:226). The potential for change to this deeply embedded more in society was considered to be a substantial reservation held by certain groups in Saudi Arabia with regard to the development of this industry and the probability of the very powerful religious leaders vetoing any relaxation of this code was pointed to (see 6.2). The findings indicated that the segregation of the genders during conferences, and the implications of this, coupled

with the restrictions placed on them outside the conferences, would be a serious deterrent to both male and female delegates.

A further reservation about the development of the industry concerns the potential requirements and expectations of international visitors with respect to entertainment and extra-conference opportunities that might conflict with fundamental religious beliefs and modes of social behaviour. Burns points out that there are ‘confused and negative attitudes towards commercial pleasure’ in Saudi Arabia, asserting that one of the paradoxes in the KSA’s intention to develop this industry is the conflict between large segments of the tourism sector and some of the core values of Islam; although the Kingdom is the guardian of Muslim values, for example, in promoting tourism, it would be promoting an economic sector based on ‘the commercial (not spiritual) consumption of time, space, culture and Western-inspired values of secular vacation time, in short: hedonism’ (Burns, 2007:232-234). Complex responses, both social and religious, to hosting non-Muslim visitors, form to a large extent the basis of contradictory attitudes towards opening the country up to the outside world. This would work against providing the extra-conference opportunities to explore the culture, for example, that the findings indicated were a real attraction to the participants. Because Western-style entertainment (in the form of, for example, cinemas, clubs, bars, theatres, casinos) is not available in Saudi Arabia (Okruhlik, 2002:8) - because it is in conflict with such religious tenets as alcohol consumption and gambling (“intoxicants and games of chance”) being forbidden as they lead to forgetfulness of God and prayer (Quran, 1996) - these kinds of entertainment would also be out of the question, at least for the foreseeable future. It seems unlikely that a conference destination could compete on the international stage without a range of extra-conference opportunities to offer delegates.

Mechanisms in place to control the potential for challenges to the cultural status quo – in the above two areas and more generally – include the strict entry requirements and the complex procedures for gaining permission to organise a conference. The number and complexity of the regulations demonstrate the extent to which control over every aspect of conference provision (including the theme and the speakers) is seen as being necessary. Both these mechanisms clearly act as inhibitors to both delegates (see 5.4.3 and 6.3.1) and organizers planning to involve foreign speakers and attendees (see 6.2). Although both were perceived to impact negatively on the capacity of the country to develop as an

international conference destination, they are clearly rooted in the socio-political context there.

### **7.2.2.ii Lack of Socio-Political Constraints in the UAE**

Unlike the KSA, and its resistance to, and suspicion of, ideas and information coming into the kingdom from outside, the officials indicated that the UAE is open to new ideas and sees conferences as being a source of knowledge and information which could be very useful to them (see 6.2). This greater openness to the outside world in the UAE can also be seen in the explicit support given to the development of the industry by its government, as well as in its current state of development, and in the lack of restrictions placed on women and on entertainment. There appear to be a lack of socio-political ideologies and stances in the UAE that might thwart development and progress; this is in sharp contrast with the situation in the KSA.

## **7.3 The Potential for Saudi Arabia to Develop as an International Conference Destination**

The aim of this thesis was to assess the development potential of Saudi Arabia as an international conference destination. Currently, as a result of the ambivalence within Saudi Arabia to opening up to the outside world, the kingdom does not have that potential. The imperative to open is in conflict with the deep opposition to the impact of such an opening on the culture. This conflict, catching the kingdom between the devil and the deep blue sea, inhibits change and development.

Although access to foreign media sources (through travel, satellite television and the internet) has opened new channels of information in Saudi Arabia and made it impossible for the Saudi government to maintain tight control over the Saudi media and the flow of information and ideas from around the world into the country, there is still a deep resistance to this outside influence taking hold. This resistance is in conflict with the implications of Saudi Arabia joining the World Trade Organisation, whose articulation of

global capitalism is that it requires a 'freer' flow of information, capital and people (Okruhlik 2002: 3).

The findings from this research study indicate that there is great ambivalence in Saudi Arabia regarding such a free flow of information, people and ideas, and enormous internal pressures to maintain the cultural status quo. As mentioned in chapter one, political and social life in the kingdom is grounded in strongly traditional and religious values which are profoundly resistant to western interference or influence; many western values are seen as antithetical to Muslim, and traditional, values. Whilst westerners may value freedom, equality and self-determination, these are considered by many in the kingdom to be an indictment of Islam, and are certainly not compatible with the monarchic, hierarchic state that Saudi Arabia is. Glosemeyer points out, for example, that the issue of women's rights in the kingdom is still 'highly controversial' (Glosemeyer, 2005:230) and indeed there is marked resistance from a religious standpoint and from traditionalists to any change in the status of women and the roles they play, particularly if this entails fuller participation in the public sphere. Restrictions on extra-conference opportunities offered to delegates were also probably rooted in traditionalist and religious resistance to forms of entertainment and behaviour considered to have the potential to violate significant social and religious norms. So, whilst on the one hand, international visitors were being invited into the country, on the other, there was a clear desire to prevent people entering who might pose a threat to cultural and religious traditions and values, as is so clearly indicated by the strict visa controls and complex international conference authorisation procedures.

It would be a mistake to conclude, however, that the ambivalence experienced by the kingdom is simply due to the conflicting forces of, on the one hand, needing such an opening for economic reasons, and, on the other, resisting such an opening on cultural and religious grounds. A crucial finding in this research arises from what the UAE data illuminates as being particular to Saudi Arabia. That the UAE has managed to develop a successful international conference industry, despite the fact that they and Saudi Arabia share similar cultures and follow the same religion, is an indication that it is the particularly conservative ideological approach to religion and social order in the KSA, alongside an extremely complex play of interests within the country and its position both

in the region and internationally, that is behind the paralysis they experience in the face of development entailing global interactions.

That the UAE have not been paralyzed in the same way by ideologically-based dilemmas is evident in their approach to the development of the industry: clear and measurable plans, strategies and objectives are in place that create a defined trajectory for future development, supported by unambiguous government commitment. These are lacking in the KSA, where the ambivalence felt has an impact on its practical capacity to host international conferences and leads to a lack of policies, strategies and objectives in place that would drive development as well as to the creation of several difficult-to-resolve issues: restrictive visa regulations for conference participants; a lack of plans to develop the infrastructure and a suitably qualified workforce; restrictions related to gender; a lack of extra-conference opportunities. Such issues outweigh the positive aspects of the kingdom's capacity to host international conferences.

Unconnected to the ambivalence, yet still having a markedly negative impact on Saudi Arabia's capacity to develop the industry, are the complications inherent in the current regulatory framework for organisers of conferences, and the paralysis inbuilt in the state institutional framework. The current state apparatus, rapidly grown into a hard-to-control institutional conglomerate, which by its nature inhibits change, coupled with almost non-existent outreach systems, makes implementation of any new policies and regulations extremely difficult.

The lack of potential this research points to with regard to Saudi Arabia's development as an international conference destination needs to be considered alongside the fact that it is now a member of the World Trade Organisation and as such is committed to opening up to the outside world, no matter how slowly that might happen. Aarts and Nonneman point out that 'the fundamental status quo [in Saudi Arabia] may ultimately not be sustainable against the changes and challenges that the system will increasingly face' (Aarts and Nonneman, 2005:453-454). To a great extent, the potential for Saudi Arabia to develop as an international conference destination is dependent on the extent to which it can commit to doing so and to working to resolve social, political and religious dilemmas and the barriers to development that arise from these. These factors will be looked at in more

detail in the following section, which focuses on the author's recommendations regarding the future development of the industry.

#### **7.4 Recommendations for the Development of the International Conference Industry in the KSA**

Based on the findings of this research study, a number of recommendations can be made regarding the potential development of the international conference industry in the KSA. In light of the ambivalence and inertia shown to exist on a number of levels with regard to change, to restructuring of the bureaucratic structure, and to interaction with the outside world, there needs to be a show of committed, unambiguous and concerted effort on the part of the government to reform.

Commitment to reforming and restructuring the current bureaucratic and institutional framework, and the complexity of the regulations and procedures within it, is essential, not only for the international conference industry, but for all newly emerging industries, and for the management and development of any existing sector, business or industry. The difficulties referred to previously in coordinating and orchestrating efforts to develop the international meetings industry would be alleviated to some extent at least by ensuring a framework is in place which allows for the dissemination of policies and action plans to all relevant bodies and which has in place effective systems for putting policy into practice. All recommendations for the development of the industry shown below are, to a large extent, dependent on such a system being created and on the government showing its commitment and support for such reform. More specifically, with regard to the meetings industry in the KSA - and in light of the resistance and ambivalence shown to exist on a number of levels with regard to potential interaction with and influence from the outside world - the government would need to demonstrate explicit and unambiguous support for its development.

With such a system in place, and with such support, the following seven specific recommendations are proposed.

1. The Higher Supreme Commission for Tourism should be given overall authority for strategy and policy-making for the meetings industry and should create a sub-commission directly responsible for that industry. This sub-committee would be responsible for the development of one central strategy which covered all directions and decisions for the industry. This would serve a number of different purposes, each of which stand as a sub-recommendation of this study:
  - it would enable one body of people to create a central strategy for the development of the industry, which would ideally, in turn, lead to the creation of clear and measurable plans, strategies and objectives that would create a defined trajectory for future development;
  - it would immediately remove many of the current complications created by so many different ministries having responsibility for different aspects of the organisation and production of a meeting and would therefore lead to the development of a more streamlined regulatory system (this, in turn, making events organisation more efficient and the KSA more easily accessible);
  - finally, and very importantly, it would demonstrate the government's support for and commitment to the industry and, by extension, to opening up to the outside world.

Connected to this recommendation, it would also be advisable to establish a Convention and Visitors Bureau. This bureau would be responsible for the more detailed aspects of industry development in regions most used for meetings and events – for market development, client services such as accommodation booking and site development, and the development of a network of suppliers, for example – leaving the sub-committee free to focus on overall strategy, policy and marketing of the industry at the national level.

2. One area of policy-making that would need to be urgently focused on by the HSCT would be visa regulations, these being a serious disincentive for meetings participants and a barrier to efficient and effective organisation of events. In the current climate in the KSA, with the cultural and religious reasons for resistance to free entry for outsiders into the kingdom, it may be impossible to overhaul the

entire visa processing and authorisation process. However, it is possible that a new visa could be created that allowed easier and quicker access for business visitors to the country, including conference participants, speakers, and suppliers. With regard to visas for female business visitors, see point five below.

3. Commitment to the development of the infrastructure so that it meets, and even surpasses, international standards, would be an essential part of development. This research indicates that the infrastructure is already of an acceptable standard in the KSA. However, if the country is to become a competitive force in the industry, it would need to provide an excellent quality of venue, of facilities, of hospitality, and of expertise in the organisation and provision of international meetings, and would need to demonstrate excellent, world class, standards of service. This brings into play the necessity for the next recommendation.
4. The drive to establish a reputation of world class quality in the above areas would all be dependent on human resources, on having people with high levels of expertise and training in those areas. As such, training and educational programmes would need to be established so that Saudi Arabia would be able to produce people with the necessary skills and knowledge to drive development of the industry. The establishment of degree courses, and the commitment to providing employment in a range of areas connected to the industry, would again show strong commitment to its development, would professionalize the image of the industry in Saudi Arabia (thereby making employment in the industry more high-status and appealing to Saudi nationals), and would, most importantly, be a direct response to one of the KSA's most pressing problems – that of unemployment.
5. A major disincentive to holding or attending international conferences in Saudi Arabia is the discriminatory system in the kingdom with regard to women. Visa restrictions on women and segregation during meetings and events make the organisation of conferences more complex and seriously restrict female participation, both as delegates and speakers; this restriction has important implications when so many international delegates, speakers and events

organisers are female, and would therefore act as a major barrier to organisers wishing to hold meetings in the kingdom. One recommendation would be to make visa restrictions less stringent for female visitors (by possibly lowering the age female *business* visitors need to be from forty to twenty five, for example) and possibly, within the actual confines of the venues, to relax segregation rules. Clearly, this area, which is so deeply connected to the wider religious and cultural context in the kingdom, is a very complex one and, although recommendations are easy to make, they may be very difficult to put into practice.

6. The area of entertainment and extra-conference activities is also one that requires attention, particularly considering the restrictions placed on different types of entertainment in the kingdom, and taking into account the growing demand of international business travellers for forms of entertainment and opportunities for social interaction to be part of their 'package'. The lack of any provision of entertainment would seriously hinder Saudi Arabia's competitive standing. Although it would be very difficult to change the provision of entertainment outside the confines of the venues and the conferences, it is recommended that a comprehensive programme of entertainment be designed for each event, one that offers activities (such as shows, cultural events) actually at the venues or the hotels, but that also offers organised, controlled, sightseeing trips to heritage sites and places of local cultural interest. To satisfy visitors' curiosity about the culture and way of life of people in Saudi Arabia, perhaps visiting speakers could be brought in to give presentations on this and to engage in discussions with delegates.
7. This study clearly demonstrates that the image held of Saudi Arabia by people who have not visited the kingdom can act as a disincentive and the literature in the area of tourism generally and in the area of conference tourism, specifically, emphasizes the enormous power of image to attract or detract people from visiting a place. If the kingdom were to commit to developing the international meetings industry, it would need to establish a brand image for itself. This would need to be planned, and the marketing to be undertaken, concurrently with all other efforts to put into place a framework for development (see

previous points), so that a strong and attractive image was being created that built on the strengths of the kingdom, allayed the concerns of prospective visitors, and counterbalanced the negative aspects. It would be advisable for Saudi Arabia to rigorously research which sectors it would be most productive to target (in terms of profit, of ongoing, return business, and in terms of minimizing resistance to the development of the industry by not targeting sectors, such as, for example, the tourist industry or the fashion industry, which would have the potential to create conflict). Once those sectors were targeted, the kingdom could build its brand image around distinction in those areas.

### **7.5 Contribution to Knowledge**

The thesis is situated historically in an exciting though turbulent period in the history of Saudi Arabia, looking at what is happening in the country as it struggles with the considerable challenges posed by both international and domestic imperatives to change. As such it contributes to an understanding of the pressures placed on a country such as Saudi Arabia - which is not yet fully engaging in the globalised world – and the social, cultural, economic and political dilemmas it is faced with in decisions about the extent to which it interacts with that world. As the Kingdom has only recently joined the World Trade Organisation, very little research has been carried out into how it might operate in a globalised market and what might hinder or support its efforts. The findings of this study, particularly those concerned with the systemic and cultural barriers to reform and change, are applicable generally to the kingdom's efforts to develop any industry involving international trade and involvement.

The study focuses on exploring the potential of the KSA to be an international conference destination. Previous research into tourism in the KSA has focused on Hajj tourism or domestic and regional tourism. In chapter one, I stated that no research had been undertaken into the factors that might hinder or support the development of an international conference industry in Saudi Arabia: this is the first study to the author's knowledge that does this. Certain aspects of the unique cultural and political situation in Saudi Arabia meant that carrying out research in the Kingdom was problematic. Difficulties in gaining access to officials, coupled with the limitations placed on the

researcher as a female, as well as difficulties obtaining information, both from documents and from people, in a country in which there is little research tradition, meant the research was carried out in circumstances with a number of limiting difficulties. These difficulties might explain to some extent the lack of previous research. However, by drawing the links between the social, political and cultural situation in Saudi Arabia and the potential for development of the industry, the study draws attention to what a significant role these factors play, and would play in the development of any industry entailing international involvement.

As pointed out in chapter three, research looking at the ways in which delegates to conferences are affected in their decision-making process, is limited (Severt et al., 2007; Zhang et al., 2007). This study contributes to the understanding of the factors that impact on delegates in their decisions to attend a conference. The bulk of research into the international conference industry has been carried out in western countries and from western perspectives, focusing on criteria relevant to established (and, occasionally, emerging) destinations. Saudi Arabia is at the point of considering development of the industry and the study therefore acts to some extent as a diagnostic assessment of its potential. The fact that it considers this from a non-western (Arab-Islamic) perspective contributes to existing knowledge by looking at criteria and factors which are particular to those parts of the world. The additional focus on the UAE makes the study, to the author's knowledge, the first one to explore the industry in the Gulf region.

More importantly, however, the research also serves to differentiate Saudi Arabia from other Gulf and Middle East countries. Although the KSA is often equated with other Gulf or Middle East destinations, such as the UAE, Kuwait and Jordan, and although to a large extent it shares many cultural and religious characteristics, it is actually very different and a major contribution to knowledge that this thesis makes therefore is that it addresses false perceptions that may be held of the KSA by illuminating and exploring these differences and showing how significant they are in plans to develop the industry.

As an investigative study, this thesis highlights the main factors impacting on the development of Saudi Arabia as an international conference destination and provides a basis for further research into the potential of the industry in Saudi Arabia specifically

(see 7.6 below). It also serves to highlight the importance of cultural and socio-political factors in research into the field of the international conference industry generally.

Because this is the first research study to investigate Saudi Arabia's potential in the international conference industry, it serves to lay the foundation for future research into this area – and into other, more macro, factors connected to Saudi Arabia. There are numerous themes that are touched on in the research that require further, more extensive study. These will be addressed below (see 7.6).

### **7.6 Limitations of the Study**

Due largely to the fact that the study is the first one to investigate the potential for the development of the international conference industry in Saudi Arabia, it takes a wide-angled view of a range of both micro- and macro-factors which might impact on its eventual development. One of the main limitations of the study, however, for the reasons given in chapter four, was the small sample sizes; the numbers responding to the questionnaire and the numbers of officials and delegates who participated in the interviews was low. Although the aim of the study was not generalizability, larger samples would have lessened the risk of ascribing too much importance to a quite limited pool of opinion. To some extent this is mitigated by the fact that the information gained from the interviews was rich and substantial. Also, although the qualitative and quantitative data were not used for purposes of corroboration, that each serves to enhance and elaborate on the information gained through the other, means that, again, the limitations are mitigated somewhat.

What might have added to the data would have been to include some questions in the questionnaire and the interviews with UAE participants regarding their views on the KSA and its potential as an international conference destination and their criteria for choosing the UAE and not the KSA. Perceptions of the KSA and the UAE could have been further validated by including delegates in other major international markets in the study, thereby gaining a wider picture of how the countries are perceived internationally.

The sample chosen in the KSA, unlike that in the UAE, included attendees from the Middle East; the extent to which their familiarity with the situation, systems, and culture in Saudi Arabia affected their responses, either negatively or positively, is not measurable but possibly needs to be addressed in any future research (see ‘Recommendations for Further Research’ below). With regard to the sample in the UAE, this mainly consisted of people involved in the conference industry, which meant that the information collected from them was likely to be thorough and (usefully) based on an established knowledge of the industry, a clear understanding of factors affecting conference tourism, and an awareness of the global conference market. Although this was valuable in the way it enabled the researcher to more clearly make comparisons with the KSA (to define and identify differences and pinpoint pertinent factors in the KSA more sharply), there is also the possibility that their responses may have been influenced by their vested interests in the success of the industry, and possibly also in the success of the UAE. Again, there are implications for further research which will be looked at in the following section.

The choice of the two conferences in the KSA can be seen to be both beneficial and to have limitations. The fact that the two conferences were, in the researcher’s view, representative of the different standards of conferences in Saudi Arabia, meant that the data gained on them would provide a fuller picture of Saudi Arabia’s capacity to host international conferences, as well as a greater opportunity to see what the negative aspects of this provision were. A limitation of this, however, was that, had two conferences been chosen that were of an equally high standard, this would have given a clearer picture of the KSA’s current capacity. A further limitation of the (limited) choice of conferences was that both conferences were held in Jeddah and the research may have unearthed different factors if it had also focused on international conferences hosted in Riyadh, which has a more conservative approach, in terms of segregation particularly. Finally, accessing a larger number of conferences might have enabled the researcher to find larger sample groups and to get a richer cross-section of respondents and their perceptions of the standard of different conferences.

In carrying out the research in a country where gender segregation is the norm, it is important to be aware that, in interviews with the officials in the KSA, the researcher was a female interviewing males and this may have had some impact on the information she gained. Whether or not a male interviewer would have received fuller or different

information is impossible to ascertain, however. The researcher is also a Saudi national, and the effect this may have had on her interpretations of the data also needs to be taken into account. The fact that she is conversant with the system in Saudi Arabia and with its social, cultural and religious mores, may have had an effect on her interpretation of the data (leading, for example, to her acceptance of certain responses because of shared ideologies or outlook, to an interpretation of the data which ‘fitted’ her understanding of the system, and reflected her views on it). The researcher made every attempt, however, to discuss the findings with people from other cultures and to request critical feedback from them. The other side of this coin is that the researcher’s understanding of the system enabled her to situate much of the data immediately in the context of Saudi Arabian culture and systems, and therefore to understand it more clearly.

A further limitation of the study was connected to time and to the fact that the researcher was based in the United Kingdom whilst carrying out this research study. Because the focus of the research was the four conferences, data needed to be collected during the time these were in progress, which had an impact on the process in a number of ways. There was no time to analyse the results from the questionnaire before conducting the interviews so the opportunity to use the interviews as a way to gather data that would clarify any ambiguity in the questionnaire findings or as a way to elaborate on and enhance what was found in the questionnaire data, was lacking. That there was a discrepancy, for example, between the number of delegates saying they would return to Saudi Arabia and the numbers saying they would recommend it, could have been followed up in interviews had the researcher had time to note this.

Living in the country and having more time to conduct separate phases of research would have enabled the researcher to do a preliminary study into the scope of the plans to develop the industry, the objectives the country was working towards, and the attitudes and views of the system held by key figures. This would have facilitated a more refined and defined focus in questions the officials were asked. Having said that, the data actually collected from the officials was useful and substantial data, even if there was a necessity to read between the lines to understand the lack of policies and strategies in place.

In an attempt to gain a clearer picture of government intentions with regard to the development of the meetings industry in Saudi Arabia, and to ascertain exactly why the

Higher Supreme Commission for Tourism had not been given overall authority and responsibility for this, the researcher attempted to interview the HSCT Chairman (a key figure in decision-making) but he was unavailable at the times when the researcher was in the country. Much useful data was gained from interviews with officials, who are familiar with the process of organising and hosting a conference in the country, but there are still gaps in the information gained which need to be filled by future research with key figures such as the Chairman, who have specific information regarding policies, objectives and strategies in place and most probably a clearer understanding of the extent of government commitment to developing the industry. A particular limitation of this study was the lack of policy documents available to the public, and therefore to researchers, in Saudi Arabia.

The limitations of this research study point the way to further research that could be carried out, and the scope of the study also illuminates a number of areas that could usefully be explored to gain a fuller picture of the situation in Saudi Arabia with regard to it developing not only this industry but any industry or sector which would entail more extensive engagement on the international stage.

### **7.7 Recommendations for Future Research**

The following section will outline a number of future research possibilities using the findings from this study, and the discussion of its limitations, as a source of the suggestions. The suggestions are grouped into themes: the first looks at possible areas of research connected to the actual provision of conferences in Saudi Arabia; the second theme concerns further research into systemic factors which pose a barrier to reform and change within the country; and the final theme is in relation to exploring political and cultural matters which impact on the country's willingness and openness to engage with the global market.

This research study, as the first to investigate the international conference industry in Saudi Arabia, has focused on two very broad areas: the practical capacity of the kingdom and the socio-political context impacting on development. Future research could usefully be carried out into the range of discrete factors that have been shown in this research to be influential, or that require further exploration or explanation. Research into the reasons

why, although so many respondents said they would like to re-visit the KSA, so many, on the other hand, remained neutral about recommending it to friends and colleagues as a conference destination, might shed light on why exactly respondents were not optimistic with regard to Saudi Arabia's potential to be a global leader. Future research into the image held of the kingdom prior to visiting it (as a way to pinpoint what features predominate in that image) and what aspects of that image change as a result of visiting would also indicate which features are based in actuality and which not; this would serve to provide the KSA with information about what to focus on in their marketing and what fears and images they need to allay. Clearly, if the KSA does move towards more committed development of this industry, one area they will need to focus on is product development. More detailed research needs to be carried out into the quality and capacity of existing venues and facilities, ascertaining where the gaps are and the extent to which current provision meets international standards. Similar research could be carried out into the transport infrastructure in the country.

A major stumbling block to the development of the international meetings industry in the KSA was found in this research to be systemic: it became apparent that the bureaucratic and institutional framework within which the policies and strategies for development would be formed and implemented was creating barriers to reform and change within the country. There seemed to be a lack of purpose-built or formal networks for strategy-making and the lack of one central strategy which covered all directions and decisions for this industry. It is clear that this is a rich and necessary focus of future research and that a detailed exploration of how exactly this system works and the extent to which it can facilitate reform and development is necessary. Possible areas for research could include: looking at the extent to which the HSCT has a voice in policy- and strategy-making and the involvement of other bodies in deciding this; research into the capacity and capability of the system to implement new policies for development; and an exploration of the extent to which there is communication and coordination between the relevant government bodies and to which they are all working according to the same policies and objectives.

It was argued that the ambivalence so apparent in the data towards the opening up of the country had its source in cultural factors. This, again, seems to be a rich and necessary focus of future research. The extent to which there is resistance to outside influence, and

the reasons given for this, needs exploration, possibly through surveys and interviews with the full range of different social, religious, business and political groups (male and female), as well as with those involved in policy-making. This could be linked to an investigation of the extent to which resistance impacts on policy-making and reform. The conflict between conservative and liberal forces, and what is behind their resistance – or openness – could be explored. With regard to gender segregation, one future avenue of research could entail a more detailed investigation of the ways in which segregation impacts on the experience of conferences. An exploration of attitudes towards the relaxation of segregation rules, particularly if this was undertaken within the confines of conferences, would also clarify the extent to which this issue could be addressed. Because entertainment, or, at least, extra-conference activities, is seen as so important by a number of conference attendees, research into exactly what kinds of entertainment they are requiring, what priority is given to this factor in comparison with others and what alternatives (such as heritage site visits) might compensate for the lack of more usual forms of entertainment, would clarify for the KSA how they need to market themselves and what market sector to target. With regard to culture, this study has demonstrated the potential for cultural, as well as social and political factors to impact on the international meetings industry; future research could usefully include an investigation of these factors in a range of global destinations.

There is enormous potential for a range of research avenues to be explored at this time in Saudi Arabia's history; it is a rich time and a fertile place to investigate the conflicts, tensions, growth potential and resistances that are so much a part of change, and which are so apparent in Saudi Arabia's moves to develop as an international conference destination.

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My name is Haifa Abdullah; I am a researcher from the School of Business and Economics at the University of Exeter in the UK. I am currently conducting a study of conference tourism in Saudi Arabia and the United Arab Emirates towards a PhD in Management. Your participation in the survey is highly valuable. Your individual answers will be strictly confidential.

In questions for which answers are provided, please choose one or several answers by ticking a box.

**1- Are you?**

<input type="checkbox"/>	Male	<input type="checkbox"/>	Female
--------------------------	------	--------------------------	--------

**2- What is your nationality:** \_\_\_\_\_

**3-In which country do you work?** \_\_\_\_\_

**4-In which type of organization are you mainly employed? (Please tick one only)**

Public sector     
  Private sector     
  Voluntary sector  
 Other (Please specify) \_\_\_\_\_

**5- On average how many conferences do you attend every year?** \_\_\_\_\_

Domestically (in your mother country)     
  Overseas

**6- Who is paying for your accommodation at this conference? (Please tick one only)**

Yourself     
  Organizers  
 Your sponsor     
  Other (Please specify) \_\_\_\_\_

**7- What is the total length of your stay in Saudi Arabia/the United Arab Emirates?** \_\_\_\_\_ nights.

**8- How much approximately will you have spent on this trip?**

\_\_\_\_\_ \$ (US) or \_\_\_\_\_ Saudi Rial / UAE Dirham

**9- How did you learn about this conference? From (please tick any that apply):**

Friends     
  Media     
  Colleagues  
 Internet     
  Exhibition     
  Other(s) (please specify) \_\_\_\_\_

**10- Where else have you attended conferences in the Middle East? (Tick any that apply)**

SA     
  Dubai     
  Oman     
  Other(s) \_\_\_\_\_  
 Jordan     
  Egypt     
  Bahrain     
 \_\_\_\_\_

11- Which is your favorite location/destination in the Middle East for conferences? (Tick one only)  Jordan  Egypt  Bahrain  SA  Dubai  Oman  Other



12- For what reasons? (Please tick the top 2)

Price  Exclusive  Atmosphere  
 Lack of hassle  Location  Other(s): \_\_\_\_\_

13- How many times have you visited the KSA in total in the past (excluding this trip)?

( ) Times  Never (please go to question 15)



14- For what purposes? Please tick any that apply?

Holiday  Business  Conference  
 VFR (visiting friends/ family)  Other(s) (please state): \_\_\_\_\_

15- Please assess the role of the following in your choice of Saudi Arabia/the United Arab Emirates as an international conference destination? (Please circle or cross the chosen number)

	Strongly Positive Influence	Positive Influence	No Influence	Negative Influence	Strongly Negative Influence
Obtaining visa	1	2	3	4	5
Experiencing Saudi/Emirati culture	1	2	3	4	5
Place unvisited before	1	2	3	4	5
The availability of information about it	1	2	3	4	5
Its heritage	1	2	3	4	5
Safety	1	2	3	4	5
Gender segregation	1	2	3	4	5
Prices	1	2	3	4	5
Entertainment facilities	1	2	3	4	5
Word of mouth recommendation.	1	2	3	4	5
Other (specify).....	1	2	3	4	5

16-Please respond to the following statements (tick one only)

- Conference tourism facilities are underdeveloped in the KSA/ UAE.  
 Conference tourism facilities are overdeveloped in the KSA/ UAE  
 Conference tourism facilities are just about right in the KSA/UAE.

## 17- Please respond to the following statements by ticking a box.

	Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Strongly Disagree
a. The conference venue is safe.					
b. The KSA/UAE as a country is a safe place to hold international conferences.					
c. Conference tourism could become a significant tourism niche in the KSA/UAE in future.					
d. Visa regulations make attending conferences in the KSA/UAE difficult.					
e. My perceptions of the KSA/UAE as a conference venue <i>before</i> attending this conference were poor.					
f. My perceptions of the KSA/UAE as a conference venue <i>after</i> attending this conference have positively changed.					
g. The KSA/UAE is an expensive conference location.					
h. I would recommend the KSA/UAE as a conference destination to my friends and colleagues.					
i. Conference facilities in the KSA/UAE are not as well developed as other locations in the Middle East.					
j. Conference tourism in the KSA/UAE is underdeveloped.					
k. The KSA/UAE is a destination I would chose to organise a conference in myself/for my organization.					
l. Transport infrastructure in the KSA/UAE is excellent for conference attendees.					
m. The KSA/UAE has the potential to become a global leader in conferences by 2015.					
n. Because of my experience with this conference, I would like to visit the KSA/UAE again.					
o. The KSA/UAE will be a global leader in conferences by 2025					

**18- The following questions have an evaluation scale with points from 1 to 5: please circle or cross the chosen number.**

a-What is your overall impression of your visit to the KSA/UAE?

**Very bad**    1    2    3    4    5    **Very good**

b- Would you recommend the KSA/UAE as a conference destination to your friends, and colleagues as ...

**Very bad?**    1    2    3    4    5    **Very good?**

c- What image of the KSA/UAE did you have before coming here?

**Very bad**    1    2    3    4    5    **Very good**

d- What image of the KSA/ UAE do you have now?

**Very bad**    1    2    3    4    5    **Very good**

e- What is your attitude to visiting the KSA/UAE again?

**Very bad**    1    2    3    4    5    **Very good**

f- How would you assess the practical organization of the conference?

**Very bad**    1    2    3    4    5    **Very good**

19- What do you perceive as being the main problems with attending conferences in the KSA/UAE?

.....  
 .....  
 .....  
 .....  
 .....  
 .....



اسمي هيفاء عبد الله، أنا باحثة من كلية الأعمال والاقتصاد، جامعة إكستير، المملكة المتحدة. وأنا حالياً أقوم بإجراء دراسة عن سياحة المؤتمرات بالمملكة العربية السعودية/ دولة الامارات وذلك للحصول على درجة الدكتوراه في الإدارة. إن مشاركتكم في هذا المسح ذات قيمة عالية. وسوف تحظى إجاباتكم بالسرية التامة.

في الأسئلة والتي سيتم الإجابة عليها، فضلاً، اختر إجابة أو العديد من الإجابات بوضع علامة في مربع الاختيار.

1. هل أنت؟

<input type="checkbox"/>	ذكر	<input type="checkbox"/>	أنثي
--------------------------	-----	--------------------------	------

2. ما هي جنسيتك: \_\_\_\_\_

3. في أي بلد تعمل؟ \_\_\_\_\_

4. ما هو نوع المؤسسة التي تعمل بها؟ (فضلاً اختراجابة واحدة فقط)  
 قطاع عام  قطاع خاص  قطاع تطوعي  
 أخرى (فضلاً اذكرها) \_\_\_\_\_

5. ما هو متوسط عدد المؤتمرات التي تحضرها كل عام؟ \_\_\_\_\_  
 محلياً (في بلدك)  خارج بلدك

6. من الذي يدفع تكاليف إقامتك أثناء حضورك هذا المؤتمر؟ (فضلاً اختراجابة واحدة فقط)

أنت شخصياً  المنظمين  
 الراعي  آخر (فضلاً حدد) \_\_\_\_\_

7. ما هو إجمالي مدة إقامتك في السعودية/ الامارات \_\_\_\_\_ ليال.

8. كم هو إجمالي إنفاقك في هذه الرحلة تقريباً؟  
 بالريال السعودي/ الدرهم الاماراتي \_\_\_\_\_ أو (الدولار الأمريكي) \$ \_\_\_\_\_

9. كيف عرفت عن هذا المؤتمر؟ من (فضلاً أختَر أياً مما يلي):  
 أصدقاء  وسائل الإعلام  زملاء  
 الإنترنت  معرض  آخر (فضلاً حدد) \_\_\_\_\_

10. أين حضرت مؤتمرات أخرى في الشرق الأوسط؟ (أختَر أياً مما يلي)  
 المملكة العربية السعودية  دبي  عمان  الأردن  
 مصر  البحرين  أخرى \_\_\_\_\_

11. ما هو الموقع المفضل لديك لعقد المؤتمرات في الشرق الأوسط؟ (فضلاً اختر واحدة فقط)

الأردن  مصر  البحرين  المملكة العربية السعودية  
 دبي  عمان  أخرى \_\_\_\_\_



12. ما هي الأسباب؟ (فضلاً، اختر أفضل سببين)

السعر  حصريه  المناخ  
 قلة الصعوبات  الموقع  أخرى \_\_\_\_\_

13. كم عدد المرات التي زرت فيها السعودية/ الامارات فيما مضي (باستثناء هذه الرحلة)؟  
 مرات ( )  أبداً (فضلاً، انتقل للسؤال رقم 15)



14. ما هو الغرض من هذه الزيارات؟ فضلاً اختر إي إجابة مناسبة؟

أجازة  رحلة عمل  مؤتمر  زيارة الأصدقاء والأقارب  
 أخرى (فضلاً حدد) \_\_\_\_\_

15. فضلاً، قيم دور كلاً مما يلي في اختيارك للمملكة العربية السعودية/ الامارات كموقع لمؤتمر دولي؟ (فضلاً ضع دائرة أو خط على الرقم الذي تختاره).

تأثير سلبي قوي	تأثير سلبي	بدون تأثير	تأثير إيجابي	تأثير إيجابي قوي	
5	4	3	2	1	الحصول على تأشيرة
5	4	3	2	1	الاحتكاك بالثقافة السعودية/ الاماراتية
5	4	3	2	1	مكان لم يتم زيارته من قبل
5	4	3	2	1	المعلومات المتاحة عنه
5	4	3	2	1	التراث السعودي/ الاماراتي
5	4	3	2	1	الأمان
5	4	3	2	1	التفرقة بين الجنسين
5	4	3	2	1	الأسعار
5	4	3	2	1	وسائل الترفيه
5	4	3	2	1	توصيات
5	4	3	2	1	أخرى (حدد).....

16. فضلاً أجب على العبارات التالية (فضلاً اختر واحدة فقط)

- وسائل سياحة المؤتمرات غير متطورة في السعودية / الامارات.  
 وسائل سياحة المؤتمرات متطورة جداً في السعودية / الامارات.  
 وسائل سياحة المؤتمرات تقريباً مناسبة في السعودية / الامارات.

## 17. فضلاً أجب عن العبارات التالية بوضع علامة في المربع المناسب.

أرفض بشدة	لا أوافق	لا أوافق ولا أرفض	أوافق	أوافق بشدة	
					قاعة مكان عقد المؤتمر هو مكان آمن.
					المملكة العربية السعودية/ الامارات هي مكان آمن لعقد المؤتمرات الدولية
					يمكن أن تصبح سياحة المؤتمرات مجال سياحي مميز في المملكة العربية السعودية/ الامارات في المستقبل.
					إن التنظيمات الخاصة بالتأثيرات تجعل حضور المؤتمرات عملية صعبة في المملكة العربية السعودية/ الامارات.
					تصوري للمملكة العربية السعودية؟ الامارات كمكان لعقد المؤتمرات كان غير جيد قبل حضور هذا المؤتمر.
					تصوري للمملكة العربية السعودية/ الامارات كمكان لعقد المؤتمرات أصبح جيداً بعد حضور هذا المؤتمر.
					المملكة العربية السعودية/ الامارات هي موقع مرتفع التكاليف لعقد المؤتمرات.
					سوف أوصي أصدقائي وزملائي بعقد مؤتمراتهم في المملكة العربية السعودية/ الامارات.
					إن وسائل/ خدمات المؤتمرات في المملكة العربية السعودية/ الامارات ليست متطورة مثل نظيراتها في الشرق الأوسط.
					سياحة المؤتمرات في المملكة العربية السعودية/ الامارات غير متطورة.
					من الممكن أن أختار المملكة العربية السعودية/ الامارات كموقع لعقد مؤتمر خاص بي أو بمؤسستي
					البنية التحتية للمواصلات في المملكة العربية السعودية/ الامارات ممتازة بالنسبة لمن يحضرون المؤتمرات.
					المملكة العربية السعودية/ الامارات لديها الامكانية لأن تكون رائدة عالمياً في المؤتمرات بحلول عام 2015.
					بسبب تجربتي مع هذا المؤتمر، فإنني أود زيارة المملكة العربية السعودية/ الامارات مرة أخرى.
					سوف تكون المملكة العربية السعودية/ الامارات رائدة عالمياً في المؤتمرات بحلول عام 2025.

18. الأسئلة التالية ذات معيار تقييمي نقاط من 1 إلى 5, فضلاً ضع دائرة أو خط على الرقم الذي تختاره.

- أ- ما هو انطباعك بشكل عام عن زيارتك للمملكة العربية السعودية/ دولة الامارات؟
- |          |   |   |   |   |   |          |
|----------|---|---|---|---|---|----------|
| سيئ جداً | 1 | 2 | 3 | 4 | 5 | جيد جداً |
|----------|---|---|---|---|---|----------|
- ب- هل توصي أصدقائك وزملاءك بعقد المؤتمرات في المملكة العربية السعودية/ الامارات؟
- |          |   |   |   |   |   |          |
|----------|---|---|---|---|---|----------|
| سيئ جداً | 1 | 2 | 3 | 4 | 5 | جيد جداً |
|----------|---|---|---|---|---|----------|
- ج- ما هو تصورك عن المملكة العربية السعودية/ الامارات قبل الحضور هنا؟
- |          |   |   |   |   |   |          |
|----------|---|---|---|---|---|----------|
| سيئ جداً | 1 | 2 | 3 | 4 | 5 | جيد جداً |
|----------|---|---|---|---|---|----------|
- د- ما هو تصورك عن المملكة العربية السعودية/ الامارات الآن؟
- |          |   |   |   |   |   |          |
|----------|---|---|---|---|---|----------|
| سيئ جداً | 1 | 2 | 3 | 4 | 5 | جيد جداً |
|----------|---|---|---|---|---|----------|
- هـ- ما هو موقفك من زيارة المملكة العربية السعودية/ الامارات مرة أخرى؟
- |          |   |   |   |   |   |          |
|----------|---|---|---|---|---|----------|
| سيئ جداً | 1 | 2 | 3 | 4 | 5 | جيد جداً |
|----------|---|---|---|---|---|----------|
- و- ما هو تقييمك للتنظيم العملي للمؤتمر؟
- |          |   |   |   |   |   |          |
|----------|---|---|---|---|---|----------|
| سيئ جداً | 1 | 2 | 3 | 4 | 5 | جيد جداً |
|----------|---|---|---|---|---|----------|

19. (في تصورك) ما هي المشاكل الرئيسية للمشاركة في مؤتمرات في المملكة العربية السعودية/ الامارات؟

.....

.....

.....

.....

.....

.....

.....

.....

Results of the reliability analysis which shows the items internal consistency

Total Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
Obtaining visa	103.313	125.061	.459	.	.849
Experiencing local culture	101.961	131.408	.309	.	.853
Unvisited before	102.285	137.256	-.037	.	.861
Availability of information	102.707	128.048	.387	.	.851
Heritage	101.890	138.954	-.127	.	.864
Safety	101.862	132.964	.179	.	.856
Gender segregation	103.679	129.579	.360	.	.852
Prices	102.411	136.769	-.010	.	.860
Entertainment facilities	103.425	132.183	.187	.	.857
Recommendation	102.792	129.359	.308	.	.853
How developed are the facilities?	103.425	128.434	.378	.	.851
Safe venue	101.341	133.871	.219	.	.855
Safe country	101.693	131.414	.350	.	.852
Future	102.130	129.301	.432	.	.850
Visa regulation	103.580	130.959	.260	.	.855
Perceptions before attending	102.792	129.388	.347	.	.852
Perceptions after attending	102.214	132.563	.253	.	.854
Expensive location	102.651	134.771	.076	.	.860
Recommend venue	102.397	122.435	.737	.	.841
Facilities not developed	102.775	128.920	.345	.	.852
Conference tourism not developed	102.834	129.733	.272	.	.855
Good destination	102.806	124.717	.608	.	.845
Transport infrastructure	103.482	127.725	.409	.	.850
Global leader in 2015?	103.101	125.193	.537	.	.847
Visit again	102.059	129.528	.463	.	.850
Global leader in 2025?	102.538	124.238	.591	.	.845
Impression	101.777	126.573	.693	.	.845
Recommend	102.355	121.596	.799	.	.840
Image before visit	102.721	125.939	.476	.	.848
Visit again?	101.848	125.471	.600	.	.846
Image after visit	101.946	128.221	.544	.	.848
Practical organization	102.059	125.734	.441	.	.849

## **Statistics for the Chi-square Tests for Section 5.2**

### **5.1a: Gender**

**Cross-tabulation**

		Location		Total
		KSA	UAE	
Gender	Female	18	42	60
	Male	53	44	97
Total		71	86	157

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	9.085(b)	1	.003		
Continuity Correction(a)	8.117	1	.004		
Likelihood Ratio	9.275	1	.002		
Fisher's Exact Test				.003	.002
Linear-by-Linear Association	9.027	1	.003		
No. of Valid Cases	157				

a Computed only for a 2x2 table

b 0 cells (.0%) have expected count less than 5. The minimum expected count is 27.13.

### **5.1b: Origin**

**Cross-tabulation**

		Location		Total
		KSA	UAE	
Q2	Middle East	25	9	34
	Non Middle East	46	77	123
Total		71	86	157

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	14.037(b)	1	.000		
Continuity Correction(a)	12.617	1	.000		
Likelihood Ratio	14.298	1	.000		
Fisher's Exact Test				.000	.000
Linear-by-Linear Association	13.948	1	.000		
No. of Valid Cases	157				

a Computed only for a 2x2 table b 0 cells (.0%) have expected count less than 5. The minimum expected count is 15.38.

**5.1c: Region of Origin****Cross-tabulation**

		Location		Total
		KSA	UAE	
Region of origin	Gulf region	10	0	10
	Middle East	15	9	24
	Europe	18	33	51
	Asia	7	19	26
	America	13	14	27
	Africa	2	8	10
	Australia	6	3	9
Total		71	86	157

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	24.881(a)	6	.000
Likelihood Ratio	29.087	6	.000
Linear-by-Linear Association	3.604	1	.058
No. of Valid Cases	157		

a 4 cells (28.6%) have expected count less than 5. The minimum expected count is 4.07.

**5.1d: Work in ME****Cross-tabulation**

		Location		Total
		KSA	UAE	
Work in	Middle East	26	12	38
	Non Middle East	45	74	119
Total		71	86	157

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	10.891(b)	1	.001		
Continuity Correction(a)	9.691	1	.002		
Likelihood Ratio	10.985	1	.001		
Fisher's Exact Test				.001	.001
Linear-by-Linear Association	10.822	1	.001		
No. of Valid Cases	157				

a Computed only for a 2x2 table b 0 cells (.0%) have expected count less than 5. The minimum expected count is 17.18.

**5.1e: Organization****Cross-tabulation**

		Location		Total
		KSA	UAE	
Organization	Public sector	20	10	30
	Private sector	42	71	113
	Voluntary sector	1	1	2
	Other	8	4	12
Total		71	86	157

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	10.774(a)	3	.013
Likelihood Ratio	10.848	3	.013
Linear-by-Linear Association	.071	1	.790
No. of Valid Cases	157		

a 2 cells (25.0%) have expected count less than 5. The minimum expected count is .90.

## Statistics for the Chi-square Tests for Section 5.3

### 5.2a: Domestic/overseas

Cross-tabulation

		Location		Total
		SA	UAE	SA
Domestic/overseas	Domestic only	4	4	8
	Overseas only	36	36	72
	Both	31	46	77
Total		71	86	157

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	1.503(a)	2	.472
Likelihood Ratio	1.506	2	.471
Linear-by-Linear Association	1.296	1	.255
N of Valid Cases	157		

a 2 cells (33.3%) have expected count less than 5. The minimum expected count is 3.62.

### 5.2b: First ME conference

Cross-tabulation

		Location		Total
		SA	UAE	SA
First ME conference	Yes	5	31	36
	No	66	55	121
Total		71	86	157

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	18.514(b)	1	.000		
Continuity Correction(a)	16.909	1	.000		
Likelihood Ratio	20.461	1	.000		
Fisher's Exact Test				.000	.000
Linear-by-Linear Association	18.396	1	.000		
N of Valid Cases	157				

a Computed only for a 2x2 table

b 0 cells (.0%) have expected count less than 5. The minimum expected count is 16.28.

**5.2c No of previous visits (grouped)**

Cross-tabulation

		Location		Total
		SA	UAE	SA
No of previous visits (grouped)	0	27	25	52
	1	8	11	19
	2	14	14	28
	3	5	11	16
	4	3	6	9
	5	1	7	8
	6 – 10	9	5	14
	Over 10	4	7	11
	Total	71	86	157

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8.910(a)	7	.259
Likelihood Ratio	9.492	7	.219
Linear-by-Linear Association	.786	1	.375
N of Valid Cases	157		

a 5 cells (31.3%) have expected count less than 5. The minimum expected count is 3.62.

**5.2d: Combined Length of stay**

Cross-tabulation

			Location		Total
			SA	UAE	SA
Combined Length of stay	1 – 5	Count	52	62	114
		% within Location	73.2%	72.1%	72.6%
	6 -10	Count	13	21	34
		% within Location	18.3%	24.4%	21.7%
	11 - 15	Count	4	2	6
		% within Location	5.6%	2.3%	3.8%
	16 - 20	Count	1	1	2
		% within Location	1.4%	1.2%	1.3%
	Other	Count	1	0	1
		% within Location	1.4%	.0%	.6%
Total	Count	71	86	157	
	% within Location	100.0%	100.0%	100.0%	

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	3.021(a)	4	.554
Likelihood Ratio	3.409	4	.492
Linear-by-Linear Association	.399	1	.528
N of Valid Cases	157		

a 6 cells (60.0%) have expected count less than 5. The minimum expected count is .45.

**5.2e: Information source**

## Cross-tabulation

			Location		Total
			SA	UAE	SA
Information source	Friends	Count	10	5	15
		% within Location	14.1%	5.8%	9.6%
	Media	Count	1	12	13
		% within Location	1.4%	14.0%	8.3%
	Colleagues	Count	29	15	44
		% within Location	40.8%	17.4%	28.0%
	Internet	Count	16	9	25
		% within Location	22.5%	10.5%	15.9%
	Exhibition	Count	0	27	27
		% within Location	.0%	31.4%	17.2%
	Other	Count	10	8	18
		% within Location	14.1%	9.3%	11.5%
	Organizers	Count	5	10	15
		% within Location	7.0%	11.6%	9.6%
	Total	Count	71	86	157
		% within Location	100.0%	100.0%	100.0%

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	45.258(a)	6	.000
Likelihood Ratio	57.106	6	.000
Linear-by-Linear Association	4.501	1	.034
N of Valid Cases	157		

a 0 cells (.0%) have expected count less than 5. The minimum expected count is 5.88.

**5.2f : Length of Stay in Relation to Region of Origin****Combined Length of stay \* Q2 Middle East Crosstabulation**

			Q2 Middle East		Total
			Middle East	Non Middle East	
Combined Length of stay	1 - 5	Count	25	89	114
		% within Q2 Middle East	73.5%	72.4%	72.6%
	6 -10	Count	7	27	34
		% within Q2 Middle East	20.6%	22.0%	21.7%
	11 - 15	Count	1	5	6
		% within Q2 Middle East	2.9%	4.1%	3.8%
	16 - 20	Count	1	1	2
		% within Q2 Middle East	2.9%	.8%	1.3%
	other	Count	0	1	1
		% within Q2 Middle East	.0%	.8%	.6%
Total	Count	34	123	157	
	% within Q2 Middle East	100.0%	100.0%	100.0%	

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	1.339(a)	4	.855
Likelihood Ratio	1.385	4	.847
Linear-by-Linear Association	.001	1	.971
N of Valid Cases	157		

a. 6 cells (60.0%) have expected count less than 5. The minimum expected count is .22.

**Components 2, 3, 4, & 6 from the Factor Analysis****Tests of Normality**

	Kolmogorov-Smirnov(a)			Shapiro-Wilk		
	Statistic	df	Sig.	Statistic	df	Sig.
Factor 2 Attraction	.143	157	.000	.963	157	.000
Factor 3 Bureaucratic obstacles and underdeveloped facilities	.093	157	.002	.977	157	.009
Factor 4 Safety	.128	157	.000	.930	157	.000
Factor 6 Prices	.154	157	.000	.956	157	.000

a Lilliefors Significance Correction

Non-parametric tests (Mann-Whitney U test) were used for components 2, 3, 4, & 6 as these were not normally distributed.

**Report / Median**

Location	Component 2 Attraction	Component 3 Bureaucracy and Standard of facilities	Component 4 Safety	Component 6 Prices
KSA	3.0000	2.7500	4.0000	3.5000
UAE	4.0000	3.5000	5.0000	2.5000
Total	3.7500	3.2500	5.0000	3.0000

**Test Statistics(a)**

	Component 2 Attraction	Component 3 Bureaucratic obstacles and underdeveloped facilities	Component 4 Safety	Component 6 Prices
Mann-Whitney U	572.000	1215.000	2360.000	1674.000
Wilcoxon W	3128.000	3771.000	4916.000	5415.000
Z	-8.815	-6.512	-2.481	-4.952
Asymp. Sig. (2-tailed)	.000	.000	.013	.000

a Grouping Variable: Location

### **Breakdown of Results on the Macro and Practical Capacity of the UAE**

**Table 5.13b:** Responses to Statements Related to the Macro Capacity of the UAE

(UAE) Abstract/big picture items		Frequency / Percentages										Mean	S.D.
		N	%	N	%	N	%	N	%	N	%		
<b>Question 17</b>		Strongly Agree		Agree		Neither Agree Nor Disagree		Disagree		Strongly Disagree			
17c	Conference tourism could become a significant tourism niche in the future.	31	36.0	49	57.0	5	5.8	0	0	1	1.2	4.27	.676
17e	My perceptions of this country as a conference venue <i>before</i> attending this conference were poor.	4	4.7	12	14.0	30	34.9	30	34.9	10	11.6	3.35	1.015
17f	My perceptions of this country as a conference venue <i>after</i> attending this conference have positively changed.	17	19.8	38	44.2	22	25.6	8	9.3	1	1.2	3.72	.929
17h	I would recommend this country as a conference destination to my friends and colleagues.	17	19.8	60	69.8	9	10.5	0	0	0	0	4.09	.545
17j	Conference tourism in this country is underdeveloped.	1	1.2	24	27.9	20	23.3	33	38.4	8	9.3	3.27	1.011
17k	This country is a destination I would choose to organise a conference in myself/for my organization	13	15.1	54	62.8	18	20.9	1	1.2	0	0	3.92	.636
17m	This country has the potential to become a global leader in conference by 2015.	23	26.7	42	48.8	16	18.6	5	5.8	0	0	3.97	.832
17n	Because of my experience with this conference I would like to visit this country again.	33	38.4	46	53.5	6	7.0	1	1.2	0	0	4.29	.648
17o	This country will be a global leader in conferences by 2025	27	31.4	39	45.3	17	19.8	3	3.5	0	0	4.05	.810
<b>Question 18</b>		1 Very bad		2		3		4		5 Very good		Mean	S.D.
18a	Impression	0	0	0	0	7	8.1	40	46.5	39	45.3	4.37	.633
18b	Recommend as Conf. destination	0	0	1	1.2	7	8.1	44	51.2	34	39.5	4.29	.666
18c	Image before visit	0	0	3	3.5	31	36.0	43	50.0	9	10.5	3.67	.710
18d	Image after visit	0	0	1	1.2	8	9.3	44	51.2	33	38.4	4.27	.676
18e	Attitude to visit again	0	0	1	1.2	6	7.0	41	47.7	38	44.2	4.35	.665

Source: Author

Table 5.15b: Responses to Statements Related to the Practical Capacity of the UAE

(UAE) Practical/tangible factors		Frequency / Percentages										Means	S. D.
		N	%	N	%	N	%	N	%	N	%		
<b>Question 15</b>		<b>1 Strongly Negative Influence</b>		<b>2 Negative Influence</b>		<b>3 No Influence</b>		<b>4 Positive Influence</b>		<b>5 Strongly Positive Influence</b>			
15a	Obtaining visa	2	2.3	7	8.1	27	31.4	23	26.7	27	31.4	3.77	1.061
15b	Experiencing the culture	0	0	2	2.3	19	22.1	46	53.5	19	22.1	3.95	.734
15c	Unvisited before	0	0	1	1.2	38	44.2	23	26.7	24	27.9	3.81	.861
15d	Availability of information	0	0	1	1.2	13	15.1	48	55.8	24	27.9	4.10	.686
15e	It's heritage	0	0	5	5.8	29	33.7	39	45.3	13	15.1	3.70	.798
15f	Safety	0	0	0	0	6	7.0	47	54.7	33	38.4	4.31	.599
15h	Price	5	5.8	25	29.1	25	29.1	25	29.1	6	7.0	3.02	1.051
15i	Entertainment	2	2.3	20	23.3	1	1.2	49	57.0	14	16.3	3.88	.697
15j	Word of mouth	0	0	0	0	15	17.4	55	64.0	16	18.6	4.01	.604
<b>Question 17</b>		<b>Strongly Agree</b>		<b>Agree</b>		<b>Neither Agree Nor Disagree</b>		<b>Disagree</b>		<b>Strongly Disagree</b>		<b>Mean s</b>	<b>S. D.</b>
17a	The conference venue is safe.	59	68.6	26	30.2	1	1.2	0	0	0	0	4.67	.496
17b	This country is a safe place to hold international conferences.	31	36.0	52	60.5	3	3.5	0	0	0	0	4.33	.541
17d	Visa regulations make attending conferences in KSA difficult.	4	4.7	13	15.1	22	25.6	35	40.7	12	14.0	3.44	1.058
17g	This country is an expensive conference location.	15	17.4	40	46.5	26	30.2	5	5.8	0	0	2.24	.811
17i	Conference facilities in this country are not as well developed as other locations in the Middle East.	0	0	8	9.3	24	27.9	40	46.5	14	16.3	3.70	.855
17l	Transport infrastructure in this country is excellent for conference attendees.	1	1.2	24	27.9	20	23.3	33	38.4	8	9.3	3.27	1.011
<b>Question 18</b>		<b>1 Very bad</b>		<b>2</b>		<b>3</b>		<b>4</b>		<b>5 Very good</b>		<b>Mean s</b>	<b>S.D.</b>
18f	Practical organization	1	1.2	1	1.2	18	20.9	46	53.5	20	23.3	3.97	.774

Source: Author

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## INTERVIEW QUESTIONS: THE DELEGATES

- Firstly, is this your first visit to this country? If not, how many times have you been previously?
- Conference tourism is my main focus; could you tell me what you think about it in this country?
- What image of the KSA / UAE did/do you have before/after coming here?
- How did you learn about this conference?
- What attracted you to this conference?
- Is the KSA / UAE a safe international conference destination?
- Have you been to more than one conference in this country?
- Did you have any difficulties coming to this conference?
- What do/don't you like most about this conference? Why?
- Have the practical aspects of the conference been organised as you expected?
- Are conference facilities well developed in the KSA / UAE compared with its competitors in the Middle East?
- As an international delegate coming to the KSA/UAE, what did you expect the organisers to offer? Were you happy with the social activities provided?
- Are you planning to spend more time here after the conference? Why?
- What is your overall impression of your visit to the KSA / UAE?
- Would you like to visit the KSA / UAE again?
- Would you recommend the KSA / UAE as a good conference destination to your friends/colleagues? Why?
- In your opinion what are the factors/ regulations that might hinder the development of conference tourism in the KSA / UAE?

AND

- What might make the KSA / UAE less attractive to visitors than other Gulf destinations?
- What would international conferences add to the KSA / UAE?

- What are the weaknesses of conference tourism in the KSA / UAE?
- What are the strengths of conference tourism in the KSA / UAE?
- How do you evaluate the participation of women in this field and at this conference (as participants, speakers and organizers)?
- How do you evaluate the entertainment provided?
- 
- Have you been given information about where to go – and what kind of entertainment is available?
- Has segregation caused you any discomfort (KSA)?
- How do you assess the KSA / UAE as an international conference destination compared to neighbouring countries?
- Do you think that the KSA / UAE is well promoted as an international conference destination?
- Does the KSA / UAE have the potential to become a global leader in conferences? Can you clarify please?
- Are there any other issues that I could have raised?

Thank you sincerely for your generous input to my project. The contribution of your time is extremely valuable.

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## INTERVIEW QUESTIONS: THE OFFICIALS

- Conference tourism is my focus, so could you tell me what you think of this type of tourism in the KSA / UAE?
- Will conference tourism be / is conference tourism a beneficial industry for the KSA / UAE economy?
- In your view, what stage of development has conference tourism reached in the KSA / UAE? For example is it still at an initial stage, is it growing, mature or in decline? Why?
- Are you satisfied with what has been achieved in this niche so far?
- Does the country (KSA) have the desire to open itself up to this kind of tourism or are there still some reservations?
- In your opinion, what are the obstacles or regulations that might limit the development of conference tourism in the KSA / UAE?
- In your opinion, is it possible to overcome these obstacles?
- What did you like/ didn't you like most about this conference? Why?
- How do foreign clients find out about such conferences?
- What are the types of entertainment that are required by Saudi tourists / Emirati tourists?
- Could you compare this conference with other international conferences?
- What are the extra facilities which might be required by the visitors?
- Do you have purpose-built conference venues?
- Do you have statistical data related to conference tourism?
- Are there experts in conference tourism in the KSA / UAE?
- Do you have many regular customers who organise conferences with your help?
- Do you search for new clients? If yes, then by which methods?
- Are conference facilities well developed in the KSA / UAE compared to its competitors in the Middle East?
- What are the future possibilities for the development of conference tourism in the KSA / UAE?

- What are the plans and strategies for developing it?
- Who is responsible for implementation of these plans and strategies?
- What are the ways in which non-governmental organisations and the private sector might help in developing this industry?
- How do you see the KSA / UAE as a destination for international conferences compared to neighbouring countries?
- Do you think that conference tourism in the KSA / UAE, in general, has been well-promoted?
- Is it possible for the KSA / UAE to become a world leader in this area?
- How do you rate the participation of females in this area?
- Are there any other issues that I could have raised?

Thank you sincerely for your generous input to my project. The contribution of your time is extremely valuable.