A STUDY OF

THE INTERRELATIONSHIP OF TOURISM DEVELOPMENT AND DESTINATION MANAGEMENT IN THE ECONOMIC DEVELOPMENT OF DEVELOPING COUNTRIES: A CASE OF THE SULTANATE OF OMAN

Submitted by

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I certify that all material in this thesis, which is not my own work, has been identified and that no material has previously been submitted and approved for the award of a degree by this or any other university.

Signature: ………………………………………

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I am grateful to God Almighty for blessing my PhD journey through to its completion.

I dedicate this thesis to the soul of the late Sultan of Oman, Qaboos bin Said, who took the Omani people from the darkness into a bright and fruitful future, and also to the soul of my beloved father, who always believed in the family and in me as I choose to pursue my dreams and my passion.

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Preface

This empirical study was conducted in the period preceding the pandemic (COVID-19). Although the final year of the study (writing-up phase) was within the happenings of the pandemic, the researcher has not involved the pandemic's impacts on the tourism industry. Such involvement would have taken my research into a broader scope and caused a deviation from the main objectives of the study. However, the researcher wishes to note that he has mentioned the pandemic's impacts in some parts of the research, particularly in Chapter Two (*section 2.5.1: Impacts of Tourism*) and Chapter Four (*section 4.6.4: Oman Tourism Indicators*).

Abstract

This exploratory study consolidates the development of the tourism industry as a crucial development agent for the economic development of developing nations. Adopting the case of the Sultanate of Oman, by considering the economic and general developmental characteristics of a tourist destination, the researcher has also endeavoured to identify the fundamental strengths (prospects) and key challenges associated with the development and management process of the tourism industry.

Concerning the subject of development and management of the tourism industry, the literature analysis revealed a paucity of available and reliable tourism data and any previous studies in developing countries. Thus, adopting the case study strategy, the Sultanate of Oman would produce a rich source of information about the objectives and questions of the study. The study also considers the significant aspects relating to the industry development process, which are destination management (including the role of DMO), destination planning and policy, destination marketing and promotion, destination stakeholders' involvement including the local community and visitors' characteristics and satisfaction, development of tourist product, as well as the impact of tourism.

Fulfilling the research objectives, and answering the research questions, required the study to employ the mixed-methods approach, qualitative in nature, with quantitative corroboration. In addition, the pragmatism paradigm was adopted to obtain an in-depth analysis and evaluation of the sector's development and management in the case study. Aligning with the paradigm, the researcher incorporated sampling methods, such as online questionnaires with the local community and visitors, in addition to incorporating semi-structured interviews with government officials and tourism business managers.

Within this approach, a triangulation technique was considered necessary to evaluate the relevant literature and add credibility to the findings. Analyzing data obtained (primary data) required using SPSS software, where cross-tabulations were performed to facilitate descriptive analysis and factor analysis. In addition, thematic analysis was used to analyse obtained data from the semi-structured interviews.

Although this study focused on Oman, findings and discussions are highly relevant to other developing countries. The results of analysing data showed that the successful development and management of the tourism industry would depend primarily on the need for effective destination management organization (DMO), collaboration and support of the stakeholders, and the availability and uniqueness of destination resources and activities. Also, the partnerships between the government and the private sector would affect the development of tourist products and services (e.g., infrastructure and facilities). However, the analysed data highlighted that destination development and management are affected by various leading factors and key issues, namely the industry's contribution to the country's economy, proper utilization of its resources, increasing local and foreign investments in public infrastructure and services, promoting destination competitiveness, and developing skills of the workforce in the industry. Other leading factors, such as the quality and availability of services, safety and security, natural environment, and other attractions, are critical in that they affect the satisfaction of visitors and the local community.

Based on empirical results, this study proposes a conceptual framework of destination development and management that provides guidelines and directions to enhance the development and contribution of the tourism industry on the economic development in a developing country. The model was applied to the Sultanate of Oman context and proved to be operational. In this case, it is reasonable to assume that the findings are transferable to other tourist destinations with a similar trend of tourism-based economic development. A number of recommendations were made in terms of tourism management, formulating policies and implementing strategies, development of tourist products, marketing strategy and promotion activities.

Keywords: tourism development, destination management, destination marketing, destination stakeholders, economic development, developing countries, Oman

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List of Abbreviations

DMO	Destination Management Organization
FDI	Foreign Direct Investment
GCC	Gulf Corporation Council
ICT	Information Communication and Technology
ISFU	Implementation Support and Follow-up Unit-Oman
ITC	Integrated Tourism Complex
MECA	Ministry of Environment and Climate Affairs (Currently: Environment Authority)
MENA	Middle East and North Africa
MICE	Meetings, Incentives, Conventions, and Exhibitions
MOCI	Ministry of Commerce and Industry-Oman (Currently: Ministry of Commerce, Industry, & Investment Promotion)
MOF	Ministry of Finance-Oman
MOHE	Ministry of Higher Education-Oman (Currently: Ministry of Higher Education, Research & Innovation)
MOI	Ministry of Information-Oman
MOM	Ministry of Manpower-Oman (Currently: Ministry of Labour)
MONE	Ministry of National Economy-Oman
MOT	Ministry of Tourism-Oman (Currently: Ministry of Heritage & Tourism)
MRMWR	Ministry of Regional Municipalities and Water Resources-Oman
NCSI	National Centre for Statistics and Information-Oman
NTDPs	National Tourism Development Plans
NTO	National Tourism Organization
NTS	National Tourism Strategy-Oman
OCEC	Oman Convention & Exhibition Centre
OECD	Organization for Economic Cooperation and Development
PPPs	Public-Private Partnerships
ROP	Royal Oman Police-Oman
SCP	Supreme Council for Planning-Oman
SMEs	Small Medium Enterprises
TALC	Tourism Area Life Cycle
TCI	Tourism Competitiveness Index
TSA	Tourism Satellite Account
TTCI	Travel and Tourism Competitiveness Index
UNDP	United Nations Development Programme
UNWTO	United Nations World Tourism Organization
VFR	Visiting Friends and Relatives
WEF	World Economic Forum
WTTC	World Travel and Tourism Council

CHAPTER ONE: INTRODUCTION

1.1 AN OVERVIEW OF TOURISM DEVELOPMENT

Tourism is a tremendous industry worldwide, one which is growing swiftly in today's global economy. The industry is viewed as one of the largest and the most diverse dynamically developing industries of economic activities worldwide. The economic development of tourism accounts for 7% of global exports and 29% of services exports, making it the world's third-largest export industry (UNWTO, 2019a). Tourism has experienced continued growth and played a significant role in countries' global quest for success since the 1950s. Until then, agriculture, and subsequently manufacturing, provided the economic foundation for societal well-being (Crouch & Ritchie, 1999, p. 138). The Secretary-General of UNWTO, Zurab Pololikashvili, claimed at Berlin ITB-2019 that "*Tourism has come of age. It is one of the top 5 economic sectors in the world, and one of the fastest-growing.*"

Tourism is a significant economic source for many countries and will undoubtedly continue to expand in the future. Being steady and phenomenal in its scale, the United Nations World Tourism Organization (UNWTO) forecasts that the worldwide international tourist arrivals worldwide will increase by 3.3% a year from 2010–2030 to reach 1.8bn by 2030 (UNWTO, 2018). The international indicators show an increasing trend towards a preference for tourism for hundreds of millions of people worldwide, as shown in Figure 1.1. The industry recorded a mere 25m international tourist arrivals in 1950, while there were 952m in 2010 (UNWTO, 2018); and 1,461m in 2019; an increase of 54% (UNWTO, 2020). As with international tourist arrivals, international tourism receipts, earned by destinations worldwide have surged from US$ 2bn in 1950 to US$ 495bn in 2000, US$ 927bn in 2010, and US$ 1,462bn in 2019 (UNWTO, 2020). Nevertheless, the development of the industry has always struggled with major challenges, and that has affected travel behaviour, including the world economic crisis (e.g., the 2014 oil prices slump), disease outbreak (e.g., Covid-19), geopolitical conflicts (e.g., Qatar Diplomatic Crisis), and natural disasters (e.g., wildfire in Australia). These dramatic and unforeseen events impact on the host destination's economy cruelly, particularly at the national level, as well as visitors' behaviours and concerns about travelling. Recently, countries, if not the whole world, are facing their biggest challenge, which is the pandemic COVID-19. The pandemic has severely affected the tourism industry locally and internationally. Millions of travellers and tourists have not been able to travel abroad to or from their countries due to the governments of host countries' strict travel rules and restrictions.

According to the World Travel & Tourism Council (WTTC), the tourism industry was worth US$8.8tr in 2018, outperforming the global economy for the eighth consecutive year[1] (UNWTO, 2019a). Furthermore, tourism plays a significant role in the countries' economies, not only in terms of economic growth through visitor spending but also by contributing to the countries' national development and employment. Developed countries (e.g., Europe, North America), as shown in Figure 1.1, are receiving the bulk of international tourists, and consequently, they are receiving most of the revenues, more than the developing countries (e.g., African and the Middle East) can receive. This should be justified by the level of tourism development and facilities provided in their destinations. Also, the economic impact report provided by WTTC (2018) indicates that the tourism industry supported 313m jobs in 2017 (WTTC, 2018). This is equal to 10.4% of the world's GDP and approximately 1 in 10 of all jobs. The WTTC reports also predicts that the industry is expected to generate more than US$ 11.3tr (10.5% of the world's GDP) and 357m jobs for the world economy by 2025 (Alhowaish, 2016, p. 1).

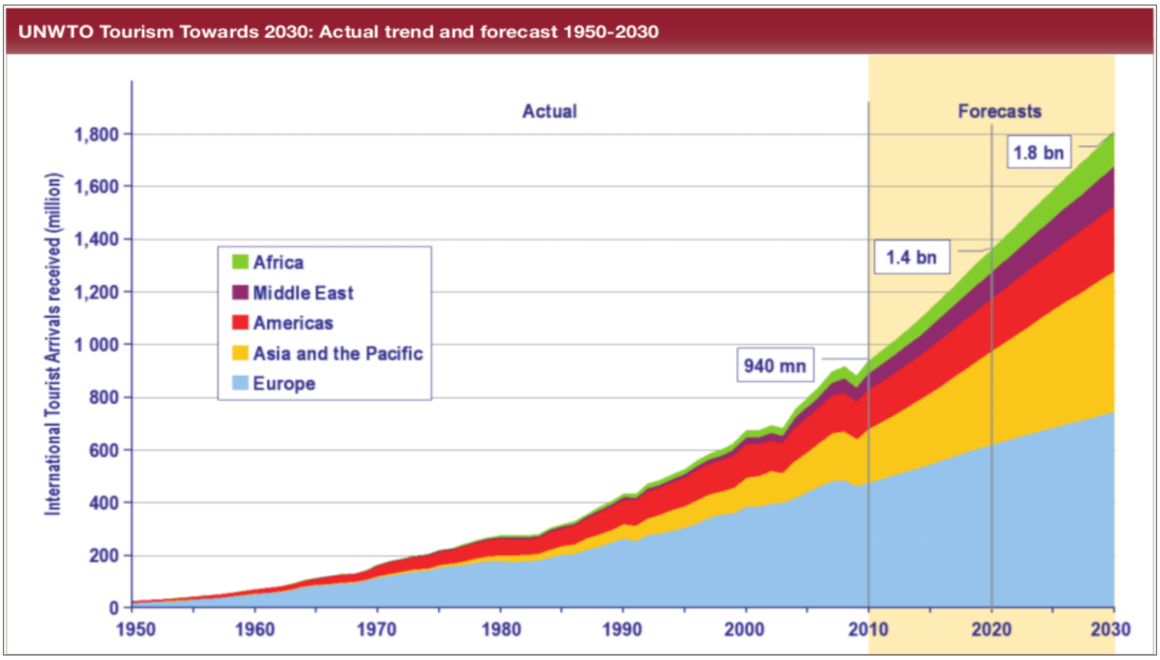

Figure 1.1 UNWTO Tourism Towards 2030: Actual trend and forecast 1950-2030
Source. UNWTO (2018)

The tourism industry has a socio-economic dimension that significantly contributes to advancing the economic development of many countries (developed and developing) through development, regeneration, or economic diversification. Over the past seven decades, the industry experienced continuous expansion and diversification that has the ability to generate

1 3.9% for travel and tourism versus 3.2% for global GDP.

economic linkages, attract high investments, and involve various stakeholders. The industry is also interlinked with other industries directly or indirectly, which together, contribute significantly to the overall development of a country's economy. The most important economic features of tourism for economic development, according to Dwyer, Forsyth, and Dwyer (2009); WTTC (2012), are mainly associated with foreign exchange earnings, contribution to the Gross Domestic Product (GDP), provision of employment and business contributions opportunities, infrastructure development, and attracting more foreign and domestic investment. According to GIZ (2014), the industry in developing countries contributes an average of 7% of total exports and 45% of service exports. As a result, over 200 countries, representing more than 2m destinations worldwide, have managed to grow their economies with increased input through the tourism industry. The growth of tourism and its potential contribution to economic development have encouraged many countries, especially developing ones, to have a share of the global tourism market. Mansfeld and Winckler (2007, p. 339) state that *'The tourism industry is the weapon of the developing countries' against the developed economies, as they could not compete with them in the areas of high-tech and highly capital incentive industries."* According to the UNCTAD (2013, p. 6) report, developing countries account for over 45% of world tourism arrivals and more than 35% of international tourism receipts. The report also shows that the increasing numbers in intraregional travel has contributed to the growth of the tourism industry in many countries, particularly developing ones. Consequently, these governments have shown great support for and promotion of tourism due to its positive effect on economic growth and development.

Many governments globally perceive tourism as a significant industry to contribute to economic growth and development. In developing countries, like the Gulf Cooperation Council[2] (GCC) countries in the Arabian Gulf region, the primary sector has been oil and gas. However, recently, the tourism industry has shown notable growth, with the countries' governments giving priority to the economic development of the tourism industry. From the 1970's, the region has become one of the main tourist destinations in the world. It still accounts for almost 4.4% of international tourist arrivals (UNWTO, 2020), having developed more dynamically than other destinations in the Middle East. However, in 2014, an oil crisis hit, creating a sharp decline in oil prices. All the GCC countries were affected and suffered a loss of a large part of their public revenues.

[2] The Gulf Cooperation Council (GCC), formed in May 1981, includes Saudi Arabia, Kuwait, the United Arab Emirates (UAE), Qatar, Bahrain, and Oman.

Such a crisis necessitates prioritizing the adoption of policies that enable the optimal exploitation and development of the resources and potentials of the economy, which in turn helps to stimulate many industries and turn them into alternative sources of income rather than just one primary source-oil. However, these are still developing countries and according to Carbone (2005), are unable to attain the same profits that developed countries receive from tourism. Related issues, as emphasized by Mustafa (2010, p. 43), include slow tourism development, either because of the lack of diversification in the economy, or the lack of development and promotion of tourism, as well as unstable political or social situations (as in the case of Yemen). Other issues like limited financial resources, competitiveness between countries, weakness of rules and policies, lack of skilled labour, and lack of tourism-related investments can cause hindrance to the development of the tourism industry. These issues necessitate a focus on the importance of destination management and its influence on the country's economic development with an emphasis on managing tourism development and the challenges of adapting to the global tourism market.

Consequently, this study seeks to investigate the status of tourism on the economic development in developing countries. More specifically, it strives to identify the forces behind the failure or slow pace and/or failure of the development of the industry by investigating the influence of the interrelationship and interdependence effects between tourism development (TD) and destination management (DM) on destination economic development (DED) in developing countries. The central construct of this research is the destination management aspect. The management of a destination is the primary determinant, an integral part of the study that illuminates the connection between tourism development and destination economic development. Besides both characteristics, tourism development and destination management have significant implications for a theoretical understanding of the economic development of any developing country in the context of the contribution of the tourism industry. They are the mainstream factors in identifying the degree of economic development and its perspectives for better positions in highly competitive tourism markets. They are not only representing a specific destination, but also endeavour to develop a country or destination that brings long-term benefits such as attracting more visitors, facilitating future marketing and product development decisions, and generally contributing to economic development (Timareva, Arabska, & Shopova, 2015, p. 96).

Based on the above, although the tourism industry is declared as among the primary engines for economic development in many developing economies, the industry faces a number of under-explored issues and challenges that hinder or impede the industry's development process. This research argues the need for a thorough investigation of the development of the tourism industry in developing countries and its interrelationship to destination management in order to enhance the country's economic development through:

- Highlighting the fundamental determinants of tourism destination competitiveness among the destinations in the same region as the GCC countries in the Arabian Gulf.
- Identifying the gap between the development of the tourism industry and destination management and marketing activities.
- Identifying the level of collaboration between the destination governments and other tourism stakeholders, tourism businesses, and the local community in viewing tourism development in developing countries.
- Investigating the contradictions and challenges that face the development of the industry in developing countries.
- Investigating the contribution of the tourism industry in the country's economy (GDP).
- Investigating the destination marketing activities and promotion methods in an endeavour to develop a destination management and marketing framework.
- Investigating the impacts of tourism on the country's economy, society, and environment to assess how destination management should optimize positive impacts while minimizing the negative impacts of tourism.
- Reviewing the country's tourism development strategies and policies.

In order to address these influential aspects and issues, the research presents a case study of the Sultanate of Oman that seeks to utilise the tourism industry to enhance the country's economic development, provide a higher standard of living among the local community, and deliver a general reflection on the outlook of tourism development shared by many other developing countries.

Like many developing countries worldwide, the Omani government has put a particular value on the tourism industry, placing it as one of the most essential five economic sectors within the ninth Five-Year Plan (2016-2020). Accordingly, by considering recent tourism development trends, the study investigates the contribution of the industry in Oman's economic development by examining the impact of the industry on both the national economy and on the society and environment. It aims to identify the challenges of tourism development by exploring the government’s marketing strategies and promotion programs, analysing the legislation governing the sector, identifying issues of tourism investment and human resources as well as evaluating tourism development strategies (Oman Vision 2020 and Vision 2040, the Sultanate's Tourism Strategy, and TANFEEDH Master-plan as a response to fluctuating oil prices).

1.2 CONTEXT OF THE STUDY: THE SULTANATE OF OMAN

The Sultanate of Oman is one of the emerging tourism destinations in the Middle East. The development and organization of the tourism industry in the Sultanate is always referred to as the 'tourism sector'. In the early 1990s, Oman's government identified the importance of tourism as an avenue of socio-economic development in the Sultanate's future development as well as a means of reducing the country's economic over-dependence on oil revenues.

The tourism sector in Oman has experienced remarkable development and expansion in the country. As a result, in 2016, the UNWTO Travel Barometer ranked Oman among the top 17 of the world's fastest-growing tourism destinations. Based on Butler's model (TALC: Tourism Area Life Cycle), the Sultanate is placed in the development stage (Al-Masroori, 2006, p. 29). The sector's contribution averaged around 2.4% of the national economy over a decade (NCSI, 2020). However, the UNWTO noted that the Omani government had anticipated that the sector's contributions to the GDP would be above 5% by 2040, according to the Sultanate's tourism strategy. The number of visitors to the Sultanate surged from less than half a million in 1995 to exceed 3m in 2019 (NCSI, 2020) partially due to global tourism organizations around the world perceiving Oman as a peaceful and unique tourist destination. In March 2019, Oman won the Best Arab Tourist Destination Award (OmanPocketGuide, 2019). The award was given as a result of a survey of experts in the travel and tourism industry in Germany conducted by "*Go Asia*" for the year 2019. The leading travel publication "*Lonely Planet*" ranked Oman eighth in the world among top countries to visit in 2017 (QatarTribune, 2016). According to the Ministry of Tourism (MOT), Oman was the only destination in the Middle East that made it onto the list as well as it being the first time the Sultanate was featured in the *'Best in Travel'* travel guide since 2009 (MOT, 2016b). Additionally, the country was named the second hottest travel destination in the world this year in *Vogue* magazine's top 10 lists for 2017. *Times of Oman* published "*Oman was ranked next to Georgia in the itinerary of places tourists must visit in the year 2017, ahead of destinations such as Langkawi in Malaysia, Madagascar, Sri Lanka, Trinidad and Tobago, the US state of Idaho, Jordan, the Danish city of Aarhus and Colombia.*" (TimesofOman, 2017b).

Although the Sultanate is blessed with many resources (natural, cultural, and heritage), it is still underdeveloped. Oman's share of the world tourist market is still minuscule compared to the other GCC countries such as Qatar, UAE, and Saudi Arabia. Reports from The World Economic Forum (WEF) and TANFEED (the Omani National Program for Enhancing Economic Diversification) state that Oman has not exploited its tourism potential in an optimal means compared to the other GCC Countries (TANFEED, 2016). Abdul-Ghani (2006) points out that the level of Oman's tourism activity is well below its potential. According to the TANFEED (2017) report, the Sultanate has been unable to capitalize on its tourism potential, in contrast with neighbouring countries, which have provided a robust business environment, developed suitable infrastructures, and improved certain tourism outlets. The MOT has made some efforts for marketing and promoting tourism locally and internationally, but those have been insufficient. Al-Azri and Morrison (2006, p. 88) state that the position of Oman as a tourist destination from the United States is weak compared to other destinations in the Middle East. The TANFEED (2016) report shows that Oman attracts only 4% (1.96m) out of a total of 49m tourists to the Arabian Gulf, which places it in the (5^{th}) position among the GCC Countries. Tourism investments and projects by local and international businesses are widely encouraged by the Omani government; however, several Omani authors and researchers have noted increasing scepticism and uneasiness about the effectiveness of both public authorities and the private sector, and the intended consequences and impacts of many government policies and strategies. The ambiguity of the development of the tourism sector in Oman is observed through the following questions: *why is the tourism sector in Oman not meeting expected projections of growth, why is the sector not attracting significant numbers of tourists, and why is the tourism contribution less than 3% in the GDP?* Perhaps, in part, it is because there is a lack of destination management and marketing, a lack of understanding the reasons behind the slow growth in the development of the sector, a lack of profiting from the recent global tourism growth, as well as not understanding the nature of the issues facing the sector. Furthermore, there has been discord among the strategies used to highlight the relevance of developing and managing the sector and matching them to the Sultanate’s development strategies (Vision 2020 and Vision 2040). In addition to this, there is the efficiency of the government, and accountability of the officials throughout the decision-making process, the effectiveness of the sector development strategies and policies and their suitability structures for execution, as well as the private sector’s role in enhancing the sector. Drawing these together, the tourism sector's development and management processes need to be modified at a national level.

1.3 CONCEPTUAL RESEARCH FRAMEWORK (RESEARCH MODEL)

Being vital to a destination's economic development, the tourism sector requires an understanding of the complex interrelationships and interactions among interdisciplinary forces and factors that play a critical role in the tourism development process. This study, therefore, suggests a conceptual framework (model), Figure 1.2, that identifies various constructs, processes, and linkages involved in the influence of tourism development and destination management association on destination economic development in developing countries. In developing the framework, the study discusses various influences by analyzing and understanding the features, relationships, and critical issues of such an association. In other words, the framework simplifies the features and processes in order to make them more manageable and understandable, doing so by focusing on critical elements, connections, and processes. Tourism development and destination management are *Independent Variables*. Creswell (2012, p. 116) refers to an independent variable as a characteristic or element that has an effect or influence on the dependent variable (outcome). Destination economic development is the *Dependent Variable*. A dependent variable can be described as a characteristic or element that is influenced, thus dependent on, by independent variables (Creswell, 2012, p. 115). Creswell (2012, p. 116) further explains that independent variables are often termed 'predictors', 'antecedent', 'factors', or 'determinants' in research studies. The association between those variables requires some aspects that are considered as *Moderating Variables.* The boxes represent the independent construct, which is associated with a number of variables, and the ellipse represents the dependent variable. This conceptual model represents a relationship between the independent variables: tourism development (TD) and destination management (DM), and the dependent variable: the destination economic development (DED), which is denoted as a proposition. The linkage of these aspects such as DMO's roles and structure, destination resources, destination planning and policies, and destination marketing and promotion, are among the most critical issues for the development of the tourism industry in developing countries.

The framework is a heuristic device that can assist researchers and practitioners in developing coherent potential explanations of the features and processes involved in the development of the tourism industry in developing countries. At the end of Chapter 2, section 2.7 provides a detailed discussion on how the variables within tourism development (TD) and destination management (DM) and Destination Economic Development (DED) are integrated into four stages. Each stage would provide a systematized structure to thinking, such as by identifying particularly imperative features and processes and by grouping related ideas and relationships.

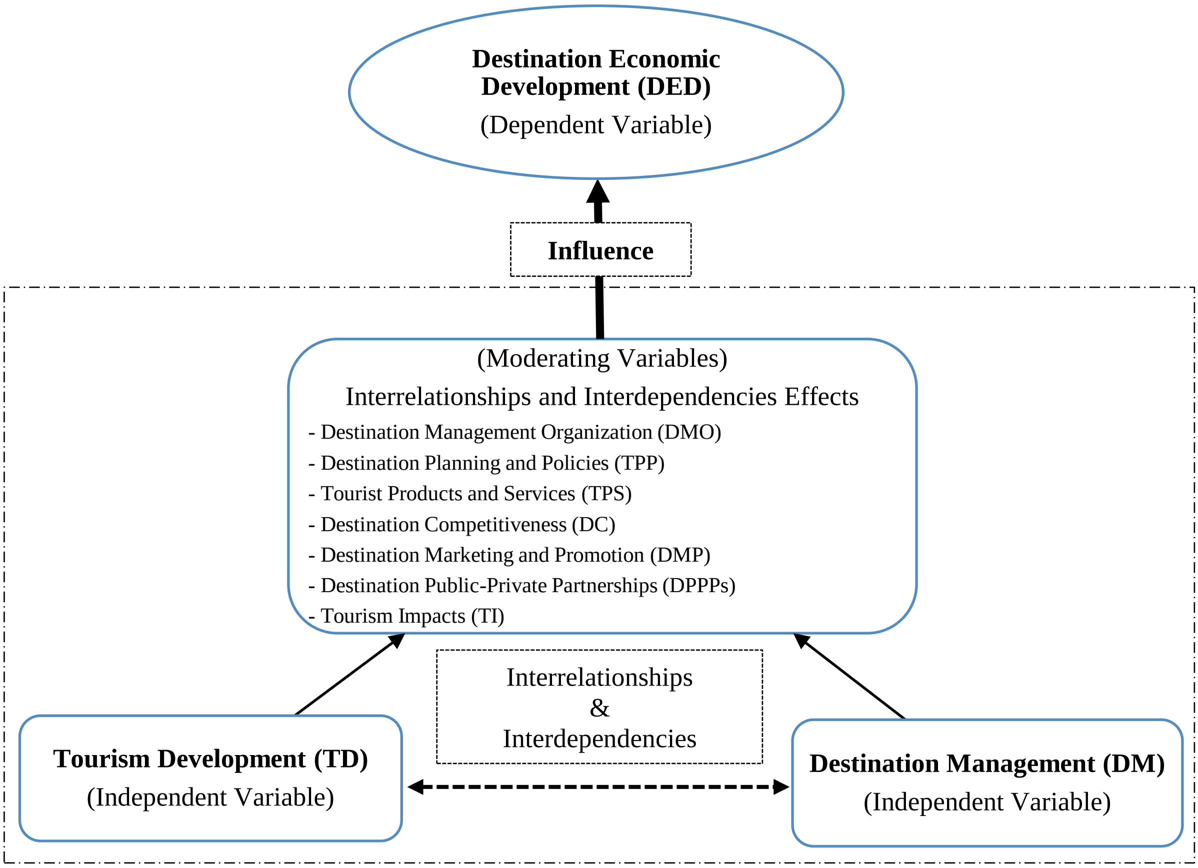

Figure 1.2 Research Model of the Influence of Tourism Development and Destination Management on Economic Development
Source. Author

1.4 AIM, OBJECTIVES, AND QUESTIONS

Considering the economic and general developmental characteristics of a tourism destination as well as identifying issues associated with the development and management process of the tourism industry in developing countries, the research aims to examine the different aspects of the tourism destination, the Sultanate of Oman, by *investigating the development of tourism within the context of destination management and marketing in relation to Oman's economic development.* In line with the research aim, four objectives, and related research questions (including subquestions) are investigated to guide the tourism sector as a development agent for economic development in Oman.

1. *To understand the contribution, impact, and evolution of the tourism sector to the economic development of Oman.* This objective is to examine the coherent history of the tourism development process, and the strategies and policies adopted to address them in the sector.

It is also focused on the contribution of the sector to the country's economic development and its positive and negative impacts on the country's economy, environment, and society. This is addressed in sections 2.2, 2.3, 2.5, and 2.6, as the research explored the drivers to tourism development using a mixed-methods approach.

I. *To what extent are the tourism sector and economic development related?* This research question is divided into four sub-questions:
   1) To what extent does the tourism sector contribute to the GDP?
   2) To what extent does the tourism sector contribute to providing employment opportunities in the market?
   3) What are the impacts of the tourism sector on the development of the economy?
   4) What are the procedures and practices the Omani government must adapt to introduce a cohesive and economically viable tourism sector that contributes to a more developed economy?
   5) How have the destination resources been exploited in supporting Oman's economy?

2. *To highlight opportunities for attracting local and international businesses in tourism projects and investments, and to examine the contradictions and challenges facing the development of the sector.* The objective was addressed in sections 2.2, 2.3, and 2.5, which identify the factors that affect the development and management of the sector as well as assessing the local community and visitors' satisfaction in greater detail. It covers tourism businesses aimed at developing the sector as well as the government's role in the sector development process, applying a qualitative approach.

II. *What are the factors impacting on investments in the tourism sector?* This research question was further divided into sub-questions:
   1) What are the government incentives to the investors?
   2) What are the challenges that need to be considered to improve investment in the tourism sector?
   3) What kind of projects and investments have been done in the tourism sector?
   4) To what extent do government laws and regulations affect investments?
   5) How has Oman tourism responded to the competitive environment?

3. *To examine how different marketing methods can be used by both private and public sectors to attract a higher number of tourists and become a preferred tourist destination while also enhancing the country's competitiveness by attracting new investors.* This objective was formulated to understand the local community and visitors' roles as critical segments in

destination tourism development and to assess the development of the destination and its tourist products and services as addressed in sections 2.2, 2.3, and 2.4, with a detailed discussion of marketing strategy and promotion methods and how they are linked to the development of the sector using a mixed-methods approach.

III. *To what extent have the marketing strategies and programs stimulated visitors to visit Oman?* This research question was further divided into four sub-questions:
   1) What are the marketing strategies that the tourism sector has adopted to promote Oman regionally and internationally?
   2) To what extent are the destination image and branding developed?
   3) What are the tourism products and services that are provided to visitors?
   4) To what extent are the visitor's demands and the destination supplies in agreement?

4. *To assess the practices, regulations, and prospects of tourism destination management, marketing, and development by both the public and private sectors.* The objective was presented and discussed in sections 2.2, 2.3, 2.4, and 2.5. Both qualitative and quantitative (mixed-methods) findings were used to conceptualize and evaluate this objective.

IV. *What are the practices that public and private sectors should adopt to create collaborating environments?* This research question was further divided into sub-questions:
   1) How has the Omani government policy and strategy affected the tourism sector in Oman?
   2) What are the enablers and barriers to the success of Oman Tourism 2040?
   3) What is the extent of the partnership between the public and private sectors?
   4) To what extent does the Omani government control the tourism sector?
   5) To what extent does the private sector participate in setting visions and objectives?

1.5 STRUCTURE OF THE THESIS

This thesis consists of EIGHT chapters, covering the introduction, the literature review, research design (methodology and methods), research context of the study (case study), research data analysis and findings (results), discussion, and conclusion.

Chapter One (Introduction) covers the background of the thesis and deals with the basic introduction to the topic, including this chapter outline. The research problem is described and gives an idea about the general context of the study. The chapter also presents a background to the case study of the research, the Sultanate of Oman, and the research objectives and questions, which build the basis of the research, are addressed.

The function of the literature review (*Chapter Two*) is to inform the theoretical basis of the analysis, demonstrate the gap in knowledge that the research fields, and create links to a developing body of knowledge. The chapter reviews the academic disciplines that are involved in this study within a broader context of current debates on destination management and its functions, destination marketing and promotion, and the role of destination stakeholders and the role of government in implementing tourism development policies. The chapter also aims to settle the theoretical framework to gain support for the theoretical position that underpins this study. Moreover, at the end of the chapter, the study contributes to the development process of tourism destination by developing a development and management destination framework that can be applied to any developing country (emerging destination) with the same characteristics of the case study, Sultanate of Oman. The framework also suggests an effective way of managing and promoting the tourism industry that will lead to sustainable tourism development.

Chapter Three (Methodology and Research Design) is concerned with the philosophical perspectives, research design, i.e., methodology, and methods used in designing and collecting data for this research, which is interpretive (qualitative) in nature but adopts a mixed-methods choice for data collection. A justification for the selection of the research strategy and the use of a mixed-method selection is provided. The sampling issues and the data analysis procedures and analytical methods are explained and justified as well as aspects relating to validity, reliability, and ethical considerations.

Chapter Four (Case Study: The Sultanate of Oman) provides a historical overview of tourism development and management in the Sultanate of Oman. This chapter investigates the evolution of tourism in general, recent developments in the global tourism industry, factors responsible for tourism growth, impacts of tourism development, and the evolution of tourism in Oman since the 1980s, as well as fundamental concepts and issues involved in the sector development process. It also discusses the Omani national tourism development strategies and identifies the national objectives for the country's development in general and the objectives of tourism development in particular.

Both *Chapters Five and Six* (Survey Analysis and Findings: Results) present the findings resulting from the analysis of the two empirical surveys obtained on the satisfaction of the local community and visitors to the development of the tourism sector in Oman. The data is analysed with the aid of Statistical Package for the Social Sciences (SPSS) (version 25), and the results are thematically reported. First, *Chapter Five* presents and reports the findings of the primary conducted research, the survey questionnaire: *the satisfaction of the local community to the development of Oman tourism sector,* which is related to the research objectives. It analyses the data and information and discusses the results, drawing interpretations with the help of the reviewed literature. The chapter is divided into sections and several subsections. These sections cover the focal items related to the satisfaction of the local community, such as demographic details, the role of Destination Management Organization (DMO) (the Ministry of Tourism), destination planning and policies, destination marketing and promotion, and tourist products and services.

Chapter Six presents and reports the findings of the primary conducted research, the survey questionnaire: *the satisfaction of the visitors to the development of the tourism sector in the Sultanate of Oman,* which is related to the research objectives. It analyzes the data and information and discusses the results, drawing interpretations with the help of the reviewed literature. This chapter is divided into sections and several subsections. These sections cover the focal items related to the satisfaction of the visitors, such as demographic details, details of the visit, visitors' overall satisfaction, destination marketing and promotion, and tourist products and services.

Chapter Seven (Interviews Analysis and Findings: Results) presents the state of the development of the tourism sector from the perspectives of two major stakeholders: government officials and the tourism business managers supported with questions and comments made by the Members of Al-Shura Council. It begins with an overview of the sample profile of the different interviewees and their roles in the tourism sector. The results are reported by proposed themes and sub-themes, which are further grouped into core themes for tourism development management in Oman. It then moves on to report the findings resulting from the analysis of the semi-structured interviews supported with content analysis from official sources such as the Ministry of Tourism Statement in Al-Shura Council (The Omani Parliament) and the session between the Minister of Tourism and the members of the council.

Finally, *Chapter Eight* (Discussion, Conclusions, and Suggestions for Future Research) is devoted to a discussion of the results from this study about the relevant literature under the main themes identified in the Research Results/Findings (Chapter Five, Six, and Seven). In the ensuing discussion, the research examines the interconnections among these topics and sub-themes and shows how the results of this research supports/challenges/fills the gaps in previous works and contributes to the current body of knowledge. It then sums up the principal conclusions of the study and examines their significance for the relevant analytical and operational debates. The theoretical, methodological, and practical contributions (implications) of this research are presented, the limitations of the research reflected upon, and some suggestions or recommendations for future research are made.

1.6 SUMMARY

This chapter provides an overview of tourism globally, and states the purpose of the study in the case of the Sultanate of Oman. It also shows a synopsis about the research model, the conceptual research framework, both of which are used to set the research aim, objectives, and questions on the state of tourism development in the Sultanate of Oman. Finally, the chapter concludes with an outline of the thesis.

The next chapter introduces a critical review of related concepts that have been put forward in the relevant tourism development and destination management research.

CHAPTER TWO: LITERATURE REVIEW

2.1 INTRODUCTION

This study explores why tourism development matters to developing countries and the significant issues and challenges faced in tourism development in such countries. In light of this aim, this chapter provides an understanding of how tourism development is linked to economic development by shedding light on the relationship between tourism development and destination management. Therefore, reviewing the literature of both approaches guides the question of how the development of the tourism industry in such countries is associated with destination management and the influence of this association on the country's economic development.

This chapter is comprised of seven sections representing the theoretical foundation of the study and its varied themes. The first section (2.1) states a discussion of Meta-Analysis and the main research themes. The second section (2.2) focuses on the nature and formation of destination management, the roles of destination management organization (DMO), the purpose of the public-private partnerships (PPPs), and the involvement and participation of destination stakeholders in tourism development. The third section (2.3) concerns destination planning and policy. The fourth section (2.4) gives an insight into the field of destination marketing, which is significant to the operation and existence of every tourism destination by focusing on marketing strategies, promotion methods (including image and branding), and product development. The fifth section (2.5) concerns the central aspect of identifying significant impacts on the development of the tourism industry and the implications arising from these impacts, as well as deliberating destination competitiveness and sustainable tourism development. The sixth section (2.6) outlines the contribution of the tourism industry to destination economic development. The seventh and final section (2.7) demonstrates the conceptual research framework, as seen in Figure 1.2, in section 1.3, in detail, through developing a full and more explicit account of tourism development and destination management more closely and conceptualizing them more comprehensively.

2.1.1 Research Themes & Meta-Analysis of the Literature

Since the mid-twentieth century, tourism, economic, and development initiatives have become a significant consideration in many countries' development strategies worldwide. Around 1950, when the introduction and regular publication of a series of international tourism statistics became available, it became easier to measure impacts and facilitate trend forecasting (Jenkins, 2015, p. 145). Since then, there has been a steady growth in the number of scientific publications dealing with different aspects of tourism studies.

In the context of the development of destination tourism, some studies have been conducted with the intention of understanding, investigating, or examining the relationship between tourism development and other different tourism domains. These include tourism planning, destination management, destination marketing, destination supply, and tourist's demands, destination economic growth, the role of DMOs, destination attractiveness and competitiveness, and sustainable tourism from a range of publications by Bunghez (2016, p. 28), Jenkins (2015), Beech and Chadwick (2005), Weaver (2005), Jafari (2001, 2003), Buhalis (2000), Sharpley (2000), Hunter (1997), Butler (1991), and Inskeep (1991). Other researchers have paid attention to a large number of issues, for example, strategic destination planning (Formica & Kothari, 2008), destination competitiveness (Mazanec, Wöber, & Zins, 2007), collaborative destination marketing (Wang & Xiang, 2007), dynamic destination management (Sainaghi, 2006), collaboration in tourism policymaking (De Araujo & Bramwell, 2002); (Bramwell & Sharman, 1999), collaboration and community-based tourism planning (Jamal & Getz, 1995) destination marketing organizations (DMOs) (Gretzel, Fesenmaier, Formica, & O'Leary, 2006), and destination governance (Beritelli, Bieger, & Laesser, 2007). Also, other contributions have included: destination planning and management (Godfrey & Clarke, 2000; Howie, 2003; Laws, 1995; Lickorish, 1989; Pike, 2004; WTO, 1994), destination marketing (Ashworth & Voogd, 1994; Heath & Wall, 1992), the promotion of destination (Ashworth & Voogd, 1994; Avraham & Ketter, 2008; Gold, 1994), and destination branding (Morgan, Pritchard, & Pride, 2007). Despite recognizing the potential significance of the development of the tourism industry for the economic development of countries, there have been few detailed and comprehensive studies of the structure, dynamics, and potential opportunities for tourism development. According to Samimi, Sadeghi, and Sadeghi (2011, p. 28), limited studies exist that investigate the relationship between economic development and tourism. Anderson (2011) states that theoretical aspects of tourism development have seldom been addressed in tourism literature, with few scholars citing different mainstream theories of tourism development such as diffusion and dependency theories in the domestic tourism context.

With the growth and maturity of destinations, the literature on tourism development has been complemented by a growing body of research on destination management (Pearce & Schänzel, 2013, p. 137). According to Wray et al. (2010b, p. 9), since the 1960s, there has been a growing stream of research investigating tourism destination management, development, and marketing. Both approaches are highly valued and potentially conflicting processes in establishing the competitiveness of a destination. In order for destinations to be competitive and sustainable in the tourism market, some researchers like Dwyer and Kim (2003); Presenza, Sheehan, and Ritchie (2005); Ritchie and Crouch (2003) have emphasized the need for destination management and have discussed the activities that need to be undertaken to achieve their goals. Others have identified and discussed issues and strategies related to destination management, such as growth management (Gill & Williams, 1994), organizations for marketing destinations (Pearce, 1992), and planning within environmental and socio-cultural capacity limits (Inskeep, 1991). Both destination management and marketing have become increasingly important in the development of tourism destinations. For decades, scholarly discussions on tourist destinations have predominantly emphasized that management, marketing, and governance approaches have contributed to a better understanding of structures and processes that allow more effective and efficient coordination, planning, and marketing of tourist destinations (Pechlaner, Kozak, & Volgger, 2014, p. 1). Based on these notions, Pearce and Schänzel (2013) are proactive in the economic and cultural development of a destination that balances and integrates the interests of visitors, service providers, and the community.

Over the last two decades, academic scholarship has started to pay serious attention to the study of the Arabian Peninsula (the Arabian Gulf) (Peterson, 2014). Ahmad (2014) noted that the challenges in conducting studies in Arab society are a lack of participants, limited public information, and supporting statistical data from the government (Ahmad, Bakar, & Ahmad, 2018). In a Middle Eastern context, the study of tourism development has focused mainly on the broader context of the Middle East and the Arab and Islamic world (e.g., (Al-Muhrzi, Al-Riyami, & Scott, 2017; Daher, 2006; Hazbun, 2008; Timothy, 2017) rather than within the Gulf Cooperation Council (GCC) regional context. For example, Stephenson and Al-Hamarneh (2017) studied the challenges faced and identified future potentialities for tourism destinations in the GCC countries. The Sultanate of Oman supports research through a national level research council, *The Research Council (TRC)*, but the number of research projects is low, especially in the area of tourism. Although much of the research conducted so far, focusing on Oman tourism has been very limited, a series of investments and tourism activities have taken place in the tourism sector. For instance, destination competitiveness (Al-Masroori, 2006), the development of careers in the hotel sector (Al-Balushi, 2008), marketability of small tourism businesses (Al-Azri, 2013), and managing residents' participation (Al-Shaaibi, 2011), but there is no attention to the role of destination management.

Although recent studies have found evidence supporting the idea that tourism has an impact on economic growth in developing countries, there is a missing link within the establishment of empirical evidence, which suggests that tourism does indeed contribute to economic development in developing countries. Sinclair (1998, p. 2) states that a smaller number of studies have focused explicitly on tourism's economic contribution in developing countries. The review of previous studies in tourism has revealed that despite the growing research interest in the development of the tourism industry, there has been little investigation into the development of tourism destination in destination management and marketing, the main research themes. Nevertheless, the only related and existing studies to this research focus on the tourism development and destination management functions individually (such as the roles and functions of DMOs, marketing and promotion, destination planning and policy, the public-private partnerships (PPPs), destination supply, and tourist’s stratification). Simultaneously, not much attention has been paid to how they interact and interrelate in the development of the tourism industry on the economic development of developing destinations. Consequently, to contribute to the lack of knowledge in tourism development, the intention of this study proposes a new approach to contribute to narrowing this gap by examining the development of the tourism industry within the context of destination management and their influence on the destination's economic development in developing countries.

Research Focus Themes:

This research addresses many critical themes and perspectives in tourism development. The selection themes have been guided by the research objectives, as shown in Table 2.1. These research focus themes are interrelated to present the primary research constructs, tourism development, and destination management and assist in developing the research Meta-Analysis. They should also lead to the success of the development process of the tourism industry and fulfill the achievement of destination economic development.

Table 2.1 Focus Themes derived from Research Objectives

Research Aim	Research Objectives	Research Focus Themes
Investigate the development of tourism within the context of destination	• To understand the contribution, impact, and evolution of the tourism sector to the economic development of Oman.	• Destination Competitiveness (DC) • Destination Management (DM) • Destination Management Organization (DMO) • Tourism Impacts (TI) • Tourism Planning and Policies (TPP)

Research Aim	Research Objectives	Research Focus Themes
management and marketing in relation to Oman's economic development.		• Tourist Products and Services (TPS)
	• To highlight opportunities for attracting local and international businesses in tourism projects and investments, and to examine the contradictions and challenges facing the development of the sector.	• Destination Management (DM) • Destination Management Organization (DMO) • Destination Marketing and Promotion (DMP) • Public & Private Partnerships (PPPs) • Tourism Planning and Policies (TPP) • Tourist Products and Services (TPS)
	• To examine how different marketing methods can be used by both private and public sectors to attract a higher number of tourists.	• Destination Management (DM) • Destination Management Organization (DMO) • Destination Marketing and Promotion (DMP) • Public & Private Partnerships (PPPs) • Tourism Planning and Policies (TPP) • Tourist Products and Services (TPS)
	• To assess the practices, regulations, and prospects of tourism destination management, marketing, knowledge, and development by both the public and private sectors.	• Destination Competitiveness (DC) • Destination Management (DM) • Destination Management Organization (DMO) • Destination Marketing and Promotion (DMP) • Public & Private Partnerships (PPPs) • Tourism Planning and Policies (TPP) • Tourist Products and Services (TPS)

Source. Author

The researcher intentionally kept the study broad to ensure that it covered the objectives. However, the researcher has been diligent and selective as far as the themes and the approach of its treatment were concerned. Table 2.2 illustrates how the research themes are covered and linked to each objective. Here, the themes interact with each other to understand these interrelationships to provide a clear picture of the major issues affecting a country's tourism industry and give a strategic framework for the development and management of the tourism industry at a destination.

Table 2.2 Intersection between Research Objectives and Themes

Research Objectives	Research Themes							
	Destination Management (DM)	Destination Competitiveness (DC)	Destination Management Organization (DMO)	Tourism Impacts (TI)	Tourism Planning and Policies (TPP)	Tourist Products and Services (TPS)	Destination Marketing and Promotion (DMP)	Public-Private Partnerships (PPPs)
1. Understand the contribution, impact, and evolution of the tourism sector related to the economic development of Oman.	x	x	x	x	x	x		
2. Highlight opportunities for attracting local and international businesses in tourism	x		x		x	x	x	x

	projects and investments, and to examine the contradictions and challenges facing the development of the sector.								
3.	Examine how different marketing methods can be used by both the private and the public sectors to attract a higher number of tourists.	x		x		x	x	x	x
4.	Assess the practices, regulations, and prospects of tourism destination management, marketing, knowledge, and development by both the public and private sectors.	x	x	x		x	x	x	x

Source. Author

Meta-Analysis in Destination Development:

This research is classified as having a holistic perspective as there is a limited, rare, and almost non-existent study on the investigation of the influence of the interrelationship and interdependence effects between the development of the tourism industry and destination management in developing destinations, which make the need for more research essential. Accordingly, in an attempt to provide a solid foundation for this study, the researcher has reviewed studies and articles about both tourism development and destination management from different perspectives and with different methodological approaches and, in doing so, sought to develop a Meta-Analysis. Meta-Analysis is a statistical technique of synthesizing evidence and summarizing the results of multiple studies on a particular topic. According to Davis, Mengersen, Bennett, and Mazerolle (2014), Meta-Analysis is a statistical method of combining results from different studies to weigh and compare and to identify patterns, disagreements, or relationships that appear in the context of multiple studies on the same topic (Snyder, 2019, p. 335). For this basic research, this method is used to evaluate the evidence in the tourism area by illustrating the 'chronology' of tourism development and destination management studies and articles that have discussed the themes related to the research objectives investigated in this study (see *Table 2.3*).

Table 2.3 Research Meta-Analysis

	Author(s)	Research Themes																				Methodology		
		Tourist Products	**Tourist Products Development**	**Tourism Development**	**Tourism Performance and Impacts**	**Destination (Economic) Development**	**Destination Competitiveness**	**Public & Private Partnerships (PPPs)**	**Destination Marketing**	**Destination Image**	**Destination Branding**	**Destination Marketing Organization**	**Destination Marketing Strategy**	**Destination Management**	**Destination Management Organization (DMO)**	**Tourist Destination**	**Tourism (Destination) Planning**	**Tourism Policy**	**Sustainable Tourism**	**Sustainable Tourism Development (STD)**	**Sustainable Development**	**Quantitative (Questionnaire)**	**Qualitative (Interviews)**	**Content Analysis (articles, reports, books)**
1.	**Tungbenchasirikul, Tiewprasertkul, and Pariyaprasert (2020)**			X		X																X		
2.	**Nomm, Albrecht, and Lovelock (2020)**			X										X	X		X						X	
3.	**Hartman, Wielenga, and Heslinga (2020)**				X				X					X							X		X	X
4.	**Lidia Andrades and Dimanche (2019)**						X												X			X		X
5.	**Sitepu (2019)**																		X	X		X		
6.	**Sainaghi, De Carlo, and d'Angella (2019)**	X		X																		X		X
7.	**Kubickova and Lee (2018)**			X			X																	X
8.	**Hristov and Petrova (2018)**													X	X		X							X
9.	**Jørgensen (2016)**								X						X								X	
10.	**Al-Maimani and Johari (2017)**			X													X							X
11.	**Kasapi and Cela (2017)**										X													X
12.	**Negrusa, Lupu, Coros, and Moca (2017)**													X	X	X								X
13.	**Pearce (2016b)**								X					X										X
14.	**Pearce (2016a)**													X									X	X

	Research Themes																				Methodology		
Author(s)	Tourist Products	Tourist Products Development	Tourism Development	Tourism Performance and Impacts	Destination (Economic) Development	Destination Competitiveness	Public & Private Partnerships (PPPs)	Destination Marketing	Destination Image	Destination Branding	Destination Marketing Organization	Destination Marketing Strategy	Destination Management	Destination Management Organization (DMO)	Tourist Destination	Tourism (Destination) Planning	Tourism Policy	Sustainable Tourism	Sustainable Tourism Development (STD)	Sustainable Development	Quantitative (Questionnaire)	Qualitative (Interviews)	Content Analysis (articles, reports, books)
15. Krce Miočić, Razovič, and Klarin (2016)														X				X				X	
16. Jenkins (2015)			X													X	X						X
17. Pearce (2015)								X					X	X								X	X
18. Pike and Page (2014)						X		X	X	X													X
19. Ness, Aarstad, Haugland, and Grønseth (2014)					X																	X	X
20. Adeyinka-Ojo, Khoo-Lattimore, and Nair (2014)								X			X		X	X									X
21. Åberg (2014)								X		X			X			X						X	
22. Pearce (2014)		X						X		X			X			X							X
23. Beritelli, Bieger, and Laesser (2014)													X	X									X
24. Klimek (2013)								X					X	X					X			X	
25. Vijayanand (2013)							X																X
26. Laesser and Beritelli (2013)		X			X	X		X		X			X			X							X
27. Longjit and Pearce (2013)								X		X			X			X						X	X
28. D. G. Pearce and Schänzel (2013)								X		X			X			X						X	
29. Morrison (2013a)								X					X	X		X							X

		Research Themes																				Methodology		
	Author(s)	Tourist Products	Tourist Products Development	Tourism Development	Tourism Performance and Impacts	Destination (Economic) Development	Destination Competitiveness	Public & Private Partnerships (PPPs)	Destination Marketing	Destination Image	Destination Branding	Destination Marketing Organization	Destination Marketing Strategy	Destination Management	Destination Management Organization (DMO)	Tourist Destination	Tourism (Destination) Planning	Tourism Policy	Sustainable Tourism	Sustainable Tourism Development (STD)	Sustainable Development	Quantitative (Questionnaire)	Qualitative (Interviews)	Content Analysis (articles, reports, books)
30.	Masarrat (2012)	X																				X		
31.	Morgan, Hastings, and Pritchard (2012)										X	X												X
32.	Fyall, Garrod, and Wang (2012)													X		X								X
33.	Cox and Wray (2011)								X															X
34.	Shirazi and Som (2011)													X										X
35.	Bornhorst, Ritchie, and Sheehan (2010)													X	X								X	
36.	Stanković and Đukić (2009)													X		X								X
37.	Elbe, Hallén, and Axelsson (2009)								X					X	X									X
38.	Zhong, Deng, and Xiang (2008)			X																		X	X	X
39.	Baker and Cameron (2008)								X		X													X
40.	Mazanec et al. (2007)						X																	X
41.	Fyall and Leask (2006)								X															X
42.	Oh (2005)			X																				X
43.	Blain, Levy, and Ritchie (2005)										X				X							X		
44.	Beerli and Martín (2004)								X	X														X

	Research Themes																				Methodology		
Author(s)	Tourist Products	Tourist Products Development	Tourism Development	Tourism Performance and Impacts	Destination (Economic) Development	Destination Competitiveness	Public & Private Partnerships (PPPs)	Destination Marketing	Destination Image	Destination Branding	Destination Marketing Organization	Destination Marketing Strategy	Destination Management	Destination Management Organization (DMO)	Tourist Destination	Tourism (Destination) Planning	Tourism Policy	Sustainable Tourism	Sustainable Tourism Development (STD)	Sustainable Development	Quantitative (Questionnaire)	Qualitative (Interviews)	Content Analysis (articles, reports, books)
45. Prideaux and Cooper (2003)								X															X
46. Sharpley (2002a)			X																				X
47. Ko and Stewart (2002)			X	X																	X		
48. Buhalis (2000)								X					X										X
49. Sharpley (2000)																			X	X		X	
50. Crouch and Ritchie (1999)					X			X		X			X			X							X

Source. Author

2.1.2 Research Theoretical Framework

The purpose of understanding the relationship between tourism development and destination management and its influence on operations has led to developing a structure of the research literature review (theoretical framework) in Figure 2.1. This theoretical framework illustrates as well as identifies the relevant areas and aspects of the relationship by placing a broader context of destination management, destination planning and policy, destination marketing and promotion, and destination competitiveness. The framework also focuses on the key areas: evaluating the role of DMOs (National DMO), identifying destination supply and tourist demands, identifying main impacts of tourism (issues and challenges), and understanding the collaboration and partnerships among stakeholders (Public-Private Partnerships). These areas within the framework are connected and interrelated that have a direct and indirect influence on tourist destination development and its economic development.

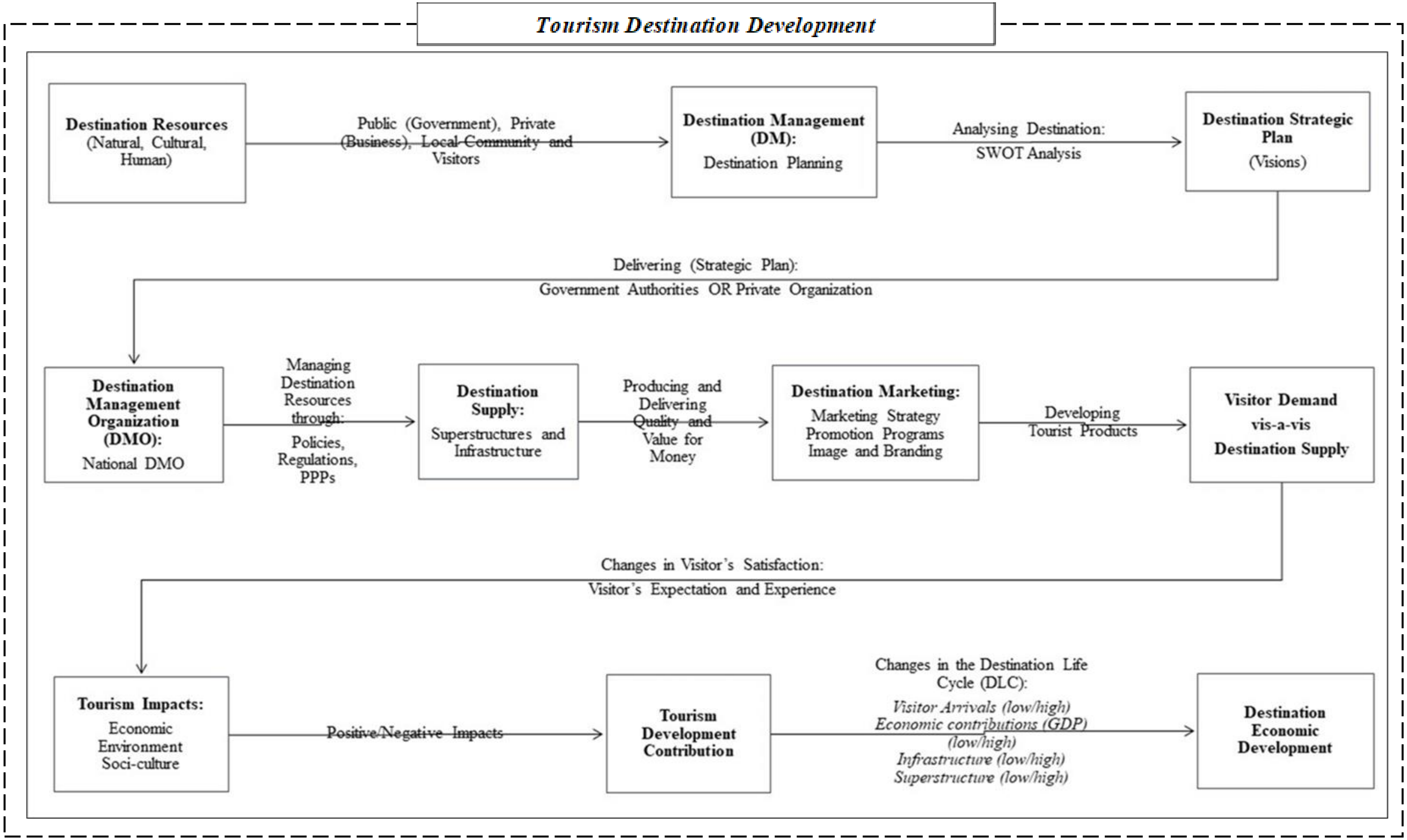

Figure 2.1 Structure of the Research Literature Review
Source. Author

2.2 MANAGEMENT OF TOURISM DESTINATION

Tourism destination is a basic unit of analysis of tourism (UNWTO, 2016) that includes various components: resources and capabilities, internal organization (focus areas, problem sets, and collective practices), and developmental stages (Ness et al., 2014; Scott, Baggio, & Cooper, 2008). These interdependent components may work with or against one another as (Fyall et al., 2012) a change in one element has ramifications for all of the others. As a multifaceted entity, UNWTO (2016, p. 13) clarifies the nature of the tourism destination "*as a physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and activities and experiences along the tourism value chain. A destination is also intangible with its image and identity, which may influence its market competitiveness.*" Moreover, tourism destination incorporates various stakeholders (e.g., government, businesses, the local community and tourists) where the cooperation and coordination of these stakeholders' efforts is in the hands of destination managers. Destination managers, according to Bosnić, Tubić, and Stanišić (2014), play a leading role to connect all participants of stakeholders and multi-resources in the tourism destination aimed at the realization and achievement of their development goals.

2.2.1 Destination Management (DM)

Destination management is an ongoing process that includes every activity to enable the destination to reach its goals in a compatible and sustainable way. The definition of destination management is "*a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, residents, businesses and the environment*" (VisitEngland, 2012, p. 3). According to Dredge, Ford, and Whitford (2011), destination management is one of the three pillars of sustainable tourism management alongside destination development and destination marketing (Pearce, 2016b, p. 23). This overarching process manages diverse facets of a destination that involves the coordination and integration of the destination resources and activities, and all stakeholders (Ford, 2011; Morrison, 2013a). Besides, the process works on strengthening the quality and effectiveness of customer satisfaction, adapts best to situational conditions (Dwyer, 2001), ensures sustainable development and positive impacts, and holds a strong position in the global tourism market (Manente, 2008). Remarkably, as the process continues, the complexity of decision-making increases because of the diversity of stakeholders' interests in the destination.

Successful destination management maintains equilibrium between the three pillars of sustainability: economic, socio-cultural, and environmental (Laesser & Beritelli, 2013) and implements destination development strategies. In addressing the challenges in destination management, Manente and Minghetti (2006) suggest effective destination management that provides development guidance and coordination at a destination. This approach involves long-term tourism planning with stakeholders and continual monitoring the progress and evaluation of the outcomes from tourism efforts (Coban & Yildiz, 2019; Morrison, 2013a). Additionally, the need for this approach is to link all stakeholders to achieve a level of tourism satisfaction and promoting long-term industry viability. Page (2009) identifies some advantages of effective destination management: establishing a competitive edge, ensuring tourism sustainability, spreading the benefits of tourism, improving tourism yield, and building a strong and vibrant brand identity.

The purpose of destination management is to connect all tourism functions and processes to create an appropriate environment for successful tourism development, where it has a range of multiple functions and activities that are handled differently in different destinations. These activities and functions, according to D. G. Pearce (2016b) and Morrison (2013a), are undertaken in a coordinated and integrated manner, see Table 2.4. In addition, such activities and functions can be carried out by mono-functional organizations, *Destination Management Organizations (DMOs)*, which are further discussed in the next section.

Table 2.4 Destination Management Functions/Activities

Destination Management Functions/Activities
• Destination marketing, branding, and positioning
• Destination planning, monitoring, and evaluation
• Development and maintenance of infrastructure
• Identifying destination elements
• Investment and projects
• Human resource development
• Product development
• Resource stewardship, environmental management
• Social and economic development

Source. Adapted from D. G. Pearce (2016b) and Morrison (2013a)

2.2.2 Destination Management Organization (DMO)

Managing a destination is a complex process due to the destination's various stakeholders, multi-resource and assets, and competition between destinations. To achieve this, a destination management organization (DMO) is needed to manage a destination effectively and efficiently. DMO is the leading organizational entity that provides leadership for tourism management in the destination (Bornhorst et al., 2010; Tigu, 2012, p. 168). Such an organization is considered the fulcrum of all developmental activities to satisfy both the host communities (suppliers of tourism) and the visitors' needs through policy development, destination standards, and authorities. Besides, it enhances the coordination and collaboration between the tourism stakeholders concerned at all levels of the destination being developed (Dwyer & Kim, 2003; Presenza et al., 2005; Witchayakawin, 2017).

As the key agents of the development process, the DMO works actively on strengthening destination competitiveness and strategy formulation as well as representing the interest of stakeholders (Kaurav, Baber, Chowdhary, & Kapadia, 2015), which would bring growth and development for the destination and eventually leads to the overall economic development. Initially, the central function of destination *management* organization (DMO) was promotional, sales, and public relations agencies, while destination *marketing* organization, have recently been entrusted with several more responsibilities and roles (Morrison, 2013a). Jenkins (2000) stresses that destination *marketing* organizations cannot concentrate only on marketing and promotion without providing for the management of tourism, product development, and tourism infrastructure (Becková & Nováková, 2016, p. 4). Interestingly, both organizations complement each other as one entity in the management and marketing of tourism destinations. As part of this evolution from marketing to destination managing, the destination *management* organization (DMO) is becoming more prominent as a destination developer by acting as a more holistic catalyst and facilitator for the realization of tourism development rather than being solely responsible for the marketing of destinations (Jonsson, 2018; Presenza, 2005).

The organization's (DMO) strategies aim at sustaining the operations of all stakeholders, increasing the competitiveness of the destination, managing the destination's resources rationally, marketing, planning and coordinating the development of the tourism destination (UNWTO, 2007, 2019b). However, without the effective leadership and coordination of an efficacious DMO, a destination is ill-equipped to be either competitive or sustainable (Negrusa et al., 2017). Wray et al. (2010b) characterize that effective DMOs should have a long-term vision of destination development; the capacity to designate responsibilities to stakeholders and to develop appropriate operational structures; and a transparent and responsible decision-making process, which involves all stakeholders (Negrusa et al., 2017, p. 75). Thus, UNWTO (2007) points out four broad goals for an effective DMO to achieve the development goals of destination, as in Figure 2.2.

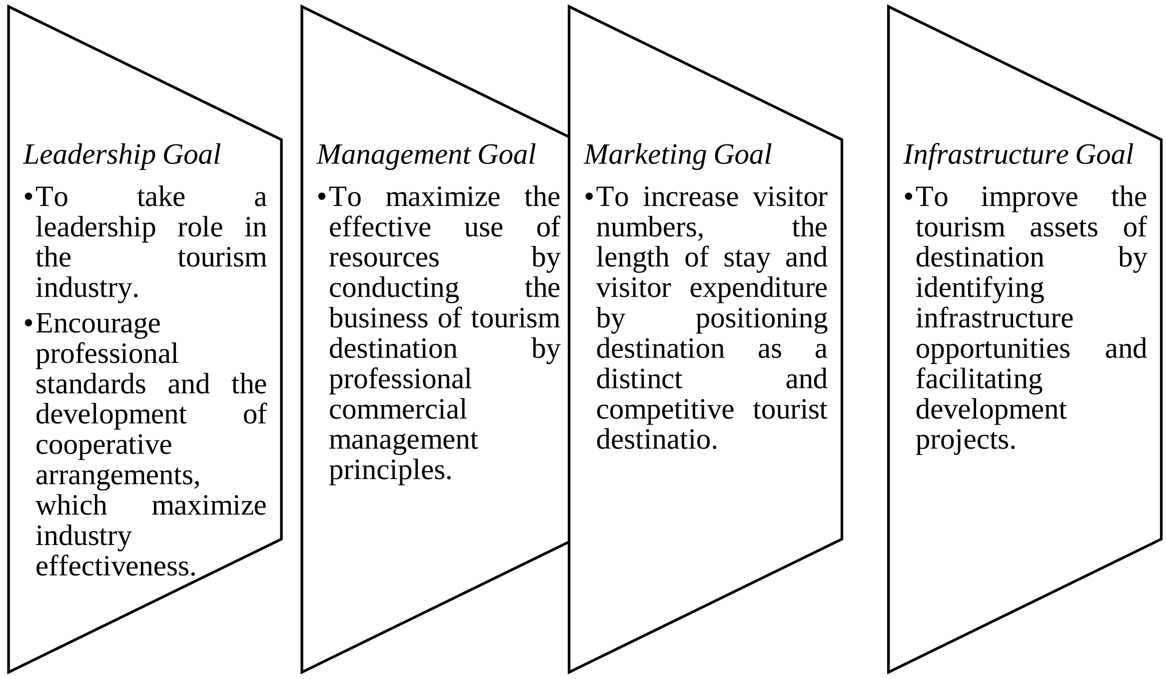

Figure 2.2 Destination Management Organization (DMO) Goals
Source. UNWTO (2007)

Cooperation and coordination are the most important functions in destination management. A DMO has the leading role in coordinating the various stakeholders' efforts and activities and analyzing the threats and opportunities for the destination in a consistent strategy, aiming towards the same goal. Notably, the roles of DMOs may vary at all levels of destination, depending on the role of coordinating and managing various activities such as the implementation of tourism strategies, formulation of policies and regulations, promotion and marketing of the destination, and development of tourist products. Destination Consultancy Group (DCG), a US-based tourism consulting company, identifies the roles of the DMO as leadership and coordination; research and planning; product development; marketing and promotion; partnerships and team-building; and community relations (Morrison, 2013a, p. 6). These activities include but not limited to the development of tourism plans and policies, long and short-term marketing plans, preferences of image and identity, and team building and coordination (Coban & Yildiz, 2019, p. 119). UNWTO (2007) also identifies four different roles of DMO's along with the elements of a destination, as shown in the figure below. The roles of DMOs can be summarised in broad terms as working towards enhancing the well-being of destination residents, towards doing everything necessary to help ensure that visitors are offered visitation experiences, as well as ensuring the provision of effective destination management (Bornhorst et al., 2010, p. 573).

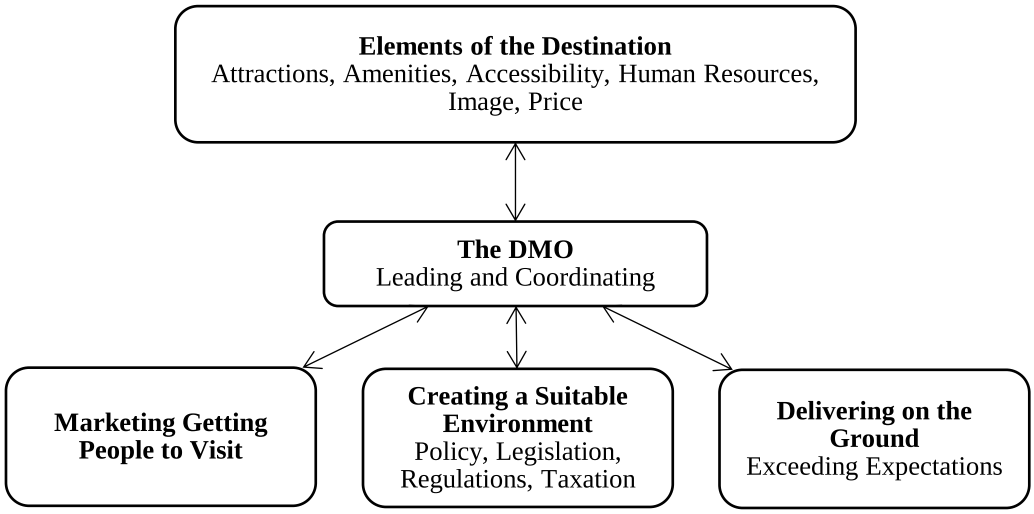

Figure 2.3 UNWTO Definition of DMO Roles
Source. adapted from UNWTO (2007) and Morrison (2013a, p. 6)

The DMO has a range of functions and activities related to the development of the destination. Bornhorst et al. (2010) identify the managerial functions of DMO, which are marketing & promotion, destination stakeholders, policy & strategy, and financial management. Morrison, Bruen, and Anderson (1998) also propose five main functions of the DMOs, listed in Figure 2.3. Ritchie and Crouch (2003) set out some internal and external activities that are essential to effective, productive operating DMO. Internal activities are related to the definition of organizational by-laws, the agreement of committee structures, the funding system, the determination of the operational procedures and membership management (Caldito, Dimanche, Vapnyarskaya, & Kharitonova, 2015, p. 67). External activities refer to marketing, tourist management, human resources management, service design, resource stewardship, and others.

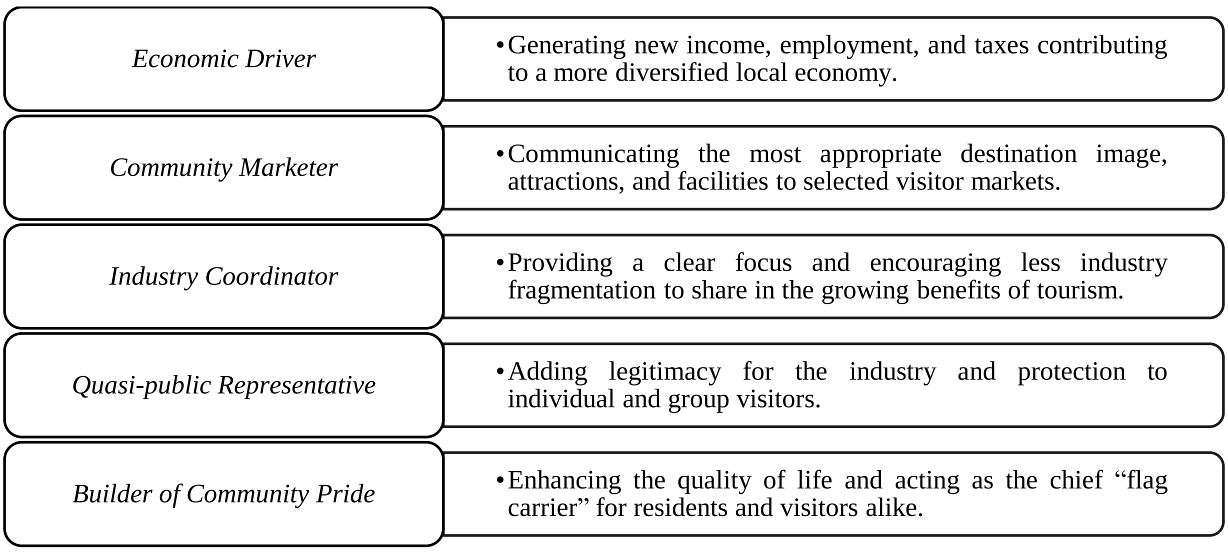

Figure 2.4 Destination Management Organization (DMO) Functions
Source. Morrison et al. (1998)

There are three main categories and potential functions in the organization structure of a DMO (Negrusa et al., 2017, p. 76). Two essential parts of the DMO activities are *External Destination Marketing (EDM),* DMOs manage the selling of destinations and their tourism products, carrying out activities such as web-marketing; events, festivals, conferences, fairs, and *Internal Destination Development (IDD),* DMOs undertake all other types of activities such as visitor services and information/research, for the maintenance and development of the destination. While the third, *Overall Destination Management (ODM),* has two primary activities: coordination of stakeholders and management of crises. However, finding the right balance between the two principal areas of responsibility, *EDM and IDD*, is the main challenge for DMOs at any level, since failing to address them in the proper ratio may lead destinations in two extremes: to promote the destination as attractive even without the appealing products (extreme on marketing role), or to have the appealing offer and exciting products without proper marketing activities (extreme of management role) (Osmankovic, Kenjic, & Zrnic, 2010).

2.2.3 Public-Private Partnerships (PPPs) in Tourism Destination

In many countries, particularly developing ones, the development of the tourism industry is distributed between a single public authority or by a partnership between the public and private organizations which significantly may vary from one country to another.

2.2.3.1 Public: Government Authorities and Private: Tourism Businesses

As public organizations, the governments of many countries in the world have an essential role in ensuring an enabling environment for tourism development. This environment should include the provision of inclusive policy frameworks and regulations, the building of partnerships with the private sector, the optimal use of tourism resources, and laying the infrastructural foundation (Ashley, De Brine, Lehr, & Wilde, 2007; UNWTO, 2006b). Besides, these governments influence the development of tourist products and attractiveness of a destination, as well as the creation of more incentive programs and attractive activities that increase the number of tourists and their experience (Chili & Xulu, 2015). Nevertheless, the nature and scope of government involvement and intervention in tourism development vary from one country to another.

The policies and functions of many governments exert a powerful influence over the way that tourism is developed, managed, and promoted (CDP, 2015, p. 5). In most, if not all, developing countries, the development and management of the tourism industry is still driven by the governments of those countries, the only authority to decide on the form and style of tourism development. According to Swarbrooke (1999), those governments have tended to dominate the development of the industry to prevent overexploitation and an obvious waste of the destination resources and to ensure that the benefits of the development of the industry are optimized. Caldito et al. (2015, p. 60) also assert that the intervention of governments often has a substantial influence on the tourism development process, because of their legislative and policymaking power. However, as Holloway (1998) states, the type of government intervention depends on the kind of system of government and the country. According to Hall (2002), governments get involved in tourism planning and development as a result of market failure acting against the public interest. For example, in developing countries, the government conducts various planning activities, including feasibility, marketing, product development, promotion, forecasting, and strategic planning. In addition, government involvement might be required to compensate for the absence of a strong and tourism-experienced private sector. As a result, government intervention could be beneficial to encourage private investors to develop the tourism sector, diversify tourism products, and play a crucial role, which private investors could not play for different reasons, according to Al-Ameri (2013).

Governments of many developing countries may not have the degree of tourism expertise and knowledge to consolidate this multi-activity industry. As a result, their involvement and intervention may present an additional array of challenges; for instance, the set policies and plans may not generate good outcomes as may be expected due to the deficiencies in the implementation of strategies and the execution of projects. Another challenge is that of integrating the management of tourism with other functions and activities of the government (Chili & Xulu, 2015).

Tourism development requires massive investments and operations that the government alone cannot afford. Government investments have proved to be woefully inadequate without private investment and market mechanisms to respond to changing visitor demands (Kotler & Armstrong, 2010). Notably, the governments of a destination may need to involve the private sector as a strategic partner, and not just a financial backer, as a response to tourism development needs. A common perception is that the private sector should be responsible for developing the sector rather than the government. The sector's participation is vital to building on industry partnerships with the government, from planning to managing tourism development (Cooper, Lindsay, Nye, & Greathouse, 1998). Additionally, having the private sector manage activities would simplify the administrative process and would result in economic benefits. Udumo, Arikpo, and Ekpo-Eloma (2013) stated that the private sector involvement would also increase and appreciate the financial standing and developmental strides of the destination government. Thus, destinations, to succeed today and in the future, should focus on applying the partnerships between the public and private sectors.

2.2.3.2 Public-Private Partnerships (PPPs)

Public-Private Partnerships (PPPs) have come to significance as a strategic purpose for tourism planning, funding, construction and supply of infrastructural equipment or exploration of services and development by aligning their resources and goals (Franco & Estevão, 2010, p. 602; Kim, Kim, & Lee, 2005). In addition, Vijayanand (2013, p. 7) points out the motives for PPPs in tourism are to improve the competitive situation and gain competitive advantages, overcome finance problems (e.g., capital shortages), transfer knowledge between the private and public, and increase professionalism and productivity. In developing countries, PPPs are essential where tourism development is in the early stages by enhancing destination competitiveness and offering quality tourist products, which will further ensure destination maintenance in the long-term (Armenski, Dwyer, & Pavluković, 2017; Buhalis, 2000). Besides, this partnership allows those countries to provide an alternative to budgetary constraints, enable the industry to build assets, and maximize the use of private-sector skills.

The DMO plays a crucial role in assisting the development and maintenance of the partnership between the public and private sectors. Vijayanand (2013, p. 7) emphasizes that a successful partnership can result only if there is a commitment from "the top" that senior officials must be actively involved in supporting the concept of PPPs and take a leadership role in the development of each given partnership. According to the UNWTO (2007) report, the public sector should act as a "*development agent*" and create the conditions to overcome the obstacles that impact cultural, legal, and economic by cooperation and networking. The private sector, on the other hand, should contribute to the destination preservation and development and become a "*market agent*," matching demand and supply and making the tourism product available on the market.

Integration between governments and tourism businesses in the form of partnerships (PPPs) is essential towards ensuring tourism development to the benefit of the destination. Such benefit of PPPs is access to private capital and expertise, especially in developing countries when the government has limited funds. Therefore, most PPPs are to be found in the development, financing, implementation, and management of the destination infrastructure such as public services, transportation, and communications. There are also other mega tourism projects and events, such as the Olympic Games or world championships, and national parks that present and lend themselves to more PPPs. Moreover, the partnerships may extend beyond marketing to strategic planning or development issues. However, the lack of coordination between various government authorities and tourism businesses still exist. This problem is created by the government's sectoral planning tradition, which allows many organizations and agencies to plan and implement development projects at the national level (Timothy, 1998). As a result, this will create a great deal of overlap between projects, and parallel research and development often take place. Even in tourism-related government sectors, fragmented development commonly occurs (Timothy, 1998). Therefore, collaboration among government departments is crucial to develop and operate tourism activities smoothly and decrease misunderstandings and disputes related to overlapping goals.

2.2.4 Management of Destination Stakeholders

Tourism stakeholders, presented in Figure 2.5, are a fundamental aspect of destination management and an integral part of tourism development. These stakeholders may have the right and the ability to make changes and influence the process and consequences of the industry development process. Besides, the involvement of stakeholders in tourism development is vital to supporting their functions and to improving destination competitiveness, and for a successful development strategy of the destination. Thus, to do so will require tourism stakeholders' taking responsibility and being willing to consider and understand other stakeholder values and development perspectives. In this regard, Buhalis (2000), for instance, points out the key responsibilities of destination managers and other stakeholders are to 1) produce management and marketing strategies, 2) enhance the long-term prosperity of the local community, 3) maximize visitors' satisfaction, 4) maximize profit for local entrepreneurs and maximize the multiplier effect, and 5) optimize tourism impacts by ensuring a sustainable development balance between economic benefits, and socio-cultural and environmental costs (Al-Masroori, 2006, pp. 80-81). However, these stakeholders are affected by the nature of the direction of tourism development (Simpson, 2001). According to Morrison (2013a, p. 22), destination stakeholders generally have different attitudes, perceptions, and behaviours regarding tourism core resources and attractions, development, and the destination's competitiveness. For instance, tourists and tourism organizations have a direct interest in destination management; they are directly affected by the tourism situation in the destination.

The other three groups are more indirectly affected by tourism in the destination, although some of these groups and individuals are more involved with tourism than others.

The cooperation of tourism stakeholders is essential for presenting destination offers and the only way to compete among other destinations in the tourism market (Krce Miočić et al., 2016). Also, Pearce (2015) asserts that the success of a tourist destination strategy lies in the power of creating a strong network of stakeholders. However, the complexities and diversity of the relationships between key stakeholders involved make managing and controlling the development of tourism destinations extremely challenging. Significantly, failure to ensure and maintain a balance effectively jeopardizes relationships among stakeholders and threatens the achievement of the destination's strategic objectives, as well as their competitiveness in the market. DMOs, therefore, work on uniting destination stakeholders by serving as intermediaries between their different interests (Slocum & Everett, 2014). According to UNWTO (2019b), the successful performance of the DMO is determined by its capacity to obtain the credibility and trust of all stakeholders in the destination and beyond its boundaries.

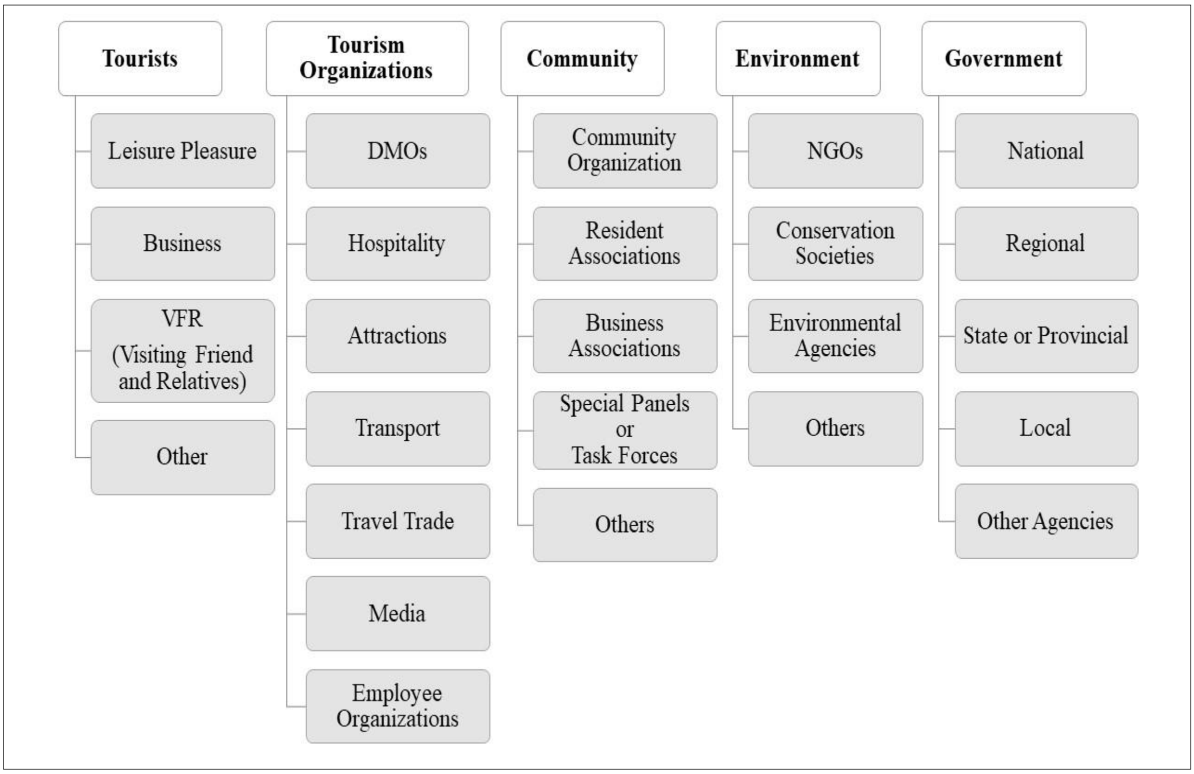

Figure 2.5 Tourism Stakeholders in Destination Management
Source. Adapted from Morrison (2013a, p. 22)

2.3 TOURISM DESTINATION PLANNING & POLICIES

Tourism planning and policy are considered as the primary function of destination management as well as the prerequisites for effective tourism development at the national destination level

(Sharpley, 2002b). Jenkins (2015, p. 151) underlies that evaluating the scarcity of resources available to support development initiatives and allocating these scarce resources efficiently are the main reasons for making destination strategic plans and policies.

2.3.1 Tourism Destination Planning

Tourism cannot develop without taking into consideration planning as a primary tool of destination development. Tourism planning is an integral part of destination management to achieve the goals of destination development. Being a strategic decision-making process, it provides guidelines for destination managers and policymakers on how to develop the destinations which may come in the form of city, region or country. This process necessitates activities or actions that enhance the possibility of achieving the destination's vision, utilizing destination resources, and forecasting future direction regarding tourists' demands. More so, this critical process of tourism development involves consideration not only of the numbers of tourists and their economic returns but also attempts to achieve the destination's development goals on different levels ranging from the national and regional macro levels to the micro-local planning level.

Successful tourism development of the destination works according to a well-defined strategic plan that brings a better balance between the economic objectives of tourism and the necessity to conserve destination natural and preserve socio-cultural resources. According to Ritchie and Crouch (2010), careful planning and management are required to ensure a proper balance between tourism growth and the development of infrastructure and other facilitating resources. Significantly, a destination that develops spontaneously, without any strategy of development, is under-prepared for the negative impacts of the economy as well as society and the environment. This is due to the shortcoming of the public administration systems, and a lack of comprehensive development approaches at local and national levels (Tosun & Jenkins, 1998; Tosun & Timothy, 2001), and a lack of consistency and continuity in planning policies. As a result, destinations that failed to plan for the orderly growth of tourism have witnessed the decline of the once-booming tourism industry. In this regard, tourism planning should focus on a way that does not negatively impact the physical and social environments, while, at the same time, it brings more benefits to the industry and the local populations (Costa, 2019). Mill and Morrison (2002) have articulated in the table below the symptoms of lack of tourism planning as they are classified into physical, human, marketing, organizational, and other. The causes of the lack of tourism planning may result in management and marketing difficulties as well as having a negative effect on the achievement of the destination goals of economic benefits.

Therefore, destination managers and policymakers should always evaluate the destination strategies so that they can understand their strengths and limit their weaknesses.

Table 2.5 Symptoms of Lack of Tourism Planning

Types of Impacts	Symptoms of Lack of Tourism Planning
Physical	- Damage or permanent alteration of the physical environment, historical and cultural landmarks and resources. - Overcrowding and congestion. - Traffic problems.
Human	- Loss of cultural identities. - Lack of education of tourism employees in skills and hospitality. - Lack of community awareness of the benefits of tourism.
Marketing	- Failure to capitalize on new marketing opportunities. - Erosion of market shares due to the actions of competitive destination areas. - Lack of sufficient awareness in prime markets. - Lack of a clear image of the destination area in potential markets. - Lack of cooperative advertising among the tourism business.
Organizational	- A fragmented approach to the marketing and development of tourism, often involving "*competitive*" splinter groups. - Lack of cooperation among tourism businesses. - Inadequate representation of tourism interests. - Lack of support from local government authorities. - Failure to act upon important issues, problems, and opportunities of common interest to tourism.
Other	- Inadequate interpretation and guiding services. - Inadequate programs of directional signs. - Lack of sufficient attractions and events. - High seasonality and short lengths of stay. - Poor or deteriorating quality of facilities and services.

Source. Adapted from Mill and Morrison (2002) and Al-Masroori (2006, p. 32)

2.3.2 Tourism Destination Policy

Tourism policy, as a regulatory framework, is a crucial area for the development of tourism destination. It is an integrative system of mechanisms to achieve destination tourism development goals. Ritchie and Crouch (2003, p. 148) define tourism policy as *"a set of regulations, rules, guidelines, directives and development/promotion objectives and strategies that provide a framework within which the collective and individual decisions directly affecting tourism development and the daily activities within a destination are taken."* Notably, the lack of policies for tourism reflects the lack of planning (lack of a strategic plan) for tourism development along with the destination, which could lead to undesirable and unsustainable outcomes. Thus, destinations need to implement policies regarding tourism to regulate the industry by setting rules and regulations that ensure optimal results. Besides, they must address the full range of essential issues that govern destination development.

Moreover, tourism policy works in concert to achieve overall competitiveness and sustainability goals. According to Al-Ameri (2013, pp. 170-171), tourism policy can be categorized based on various purposes: 1) *Tourism Infrastructure Policy* that focuses on infrastructural developments to serve the tourism industry, such as developing of airports and developing the hospitality amenities and facilities with an international standard of quality. 2) *State-Led Tourism Development Policy* that deals with the development of large-scale tourism projects such as building museums, malls, theme parks, airports. 3) *Marketing, Promoting, Events, and Festivals Policy*: where tourist products require constant marketing to promote them across the traditional and new market segment through events (e.g., sport, cultural, and musical). 4) *Develop Tourism Products "Types" policy*: develop the products or types for tourists around the globe such as eco-tourism, sports tourism, cultural tourism, and business tourism.

2.4 MARKETING OF TOURISM DESTINATION

Development in the tourism industry is associated with the marketing of the destination. Destination management and marketing should function thoroughly and professionally to fulfill the needs and desires of stakeholders. Marketing of tourism destination is the way of applying the marketing concepts to planning a strategy to attract potential tourists to destinations. Successful marketing of a destination enhances the destination development process and balances stakeholders' objectives and interests. Wahab, Rothfield, and Crampton (1976, p. 24) define destination marketing: *"as the management process through which the national tourist organizations and/or tourist enterprises identify their selected tourists, actual and potential, communicate with them to ascertain and influence their wishes, needs, motivations, likes and dislikes, on local, regional, national and international levels, and to formulate and adapt their tourist products accordingly in view of achieving optimal tourist satisfaction thereby fulfilling their objectives"* (Pike & Page, 2014, p. 7). According to Mazilu (2012b, p. 85), whatever type of destination, the marketing tasks are the same. Besides, both effective management and marketing are interrelated and equally valued in the success of a tourism destination (Morrison, 2013a). In coordination with the planning and management of the destination, destination marketing facilitates tourism development objectives, identifies the product or experience, and understands the visitor demands. It also ensures the sustainability of the destination's resources (Blumberg, 2005; Buhalis, 2000).

2.4.1 Destination Marketing Strategies

The success of marketing the destination in the tourism market depends highly on the efficiency of the destination marketing strategy. The destination marketing strategy is a broad plan of action for using a destination's resources appropriately to meet its marketing objectives as well as creating and improving the image of the destination, thus differentiating it from others. In addition to this, the destination marketing strategy should be addressing decisions related to tourist product development, branding the destination and positioning of the destination globally. Moreover, for destinations to be successful in the global tourism market, Cox and Wray (2011) have outlined three marketing strategies. These key strategies are (1) promoting the destination and its various attractions and facilities, (2) accessing the distribution channels for potential visitors, and (3) assessing the overall price strategy and the type of visitor to attract. It is important to note that the implementation of these strategies falls under the competence of the destination organizations (DMOs), where it must be done professionally and thoroughly.

More so, in the way that the destination is a strong competitor, the destination marketing strategy enables destination managers and policymakers to target appropriate tourism market segments and optimizes economic benefits without jeopardizing destination resources. In this aspect, Riege and Perry (2000) suggest three approaches for marketing strategies of a destination: 1) *consumer-oriented*, which focuses on core marketing strategies related to full product/market coverage or product specialization, market specialization, or both; 2) *competitor-oriented*, which focuses on developing, maintaining, or defending a destination's position in the marketplace; and finally, 3) *trade-oriented*, where the emphasis is on the role of different intermediaries such as tour operators in the distribution chain of tourism products within the total industry chain (Al-Masroori, 2006, p. 80). However, the implementation of these strategies might become a challenge for many destination organizations, DMOs, in the context of developing countries.

2.4.2 Tourism Destination Promotion

Destination promotion is a significant marketing activity that includes various methods designed to present a destination and its products to prospective visitors. The activities of destination promotion would differentiate the destination and be remembered easily. Presenza (2005, p. 4) divides tourism promotion into two main groups: inner promotion and external promotion. The *inner promotion* promotes the attractions to the visitors to engage their attention and, ultimately, their business through visitation. In contrast, the *external promotion* comprises the activities put into action to attract potential tourists, promoting all resources of the destination as a unique product, and consolidates the image of the destination. Both cases need to ensure that the groups are engaged and can interact. Such actions would require smoothing of the process of promotion through shaping tourist offering and a careful design of the tourism product that will provide benefits to the stakeholders.

Marketing of the destination is a process of planning and executing the promotion and distribution of tourist products to create exchanges that will achieve destination development goals. The use of various promotional methods shall lead to an increase in effectiveness within the destination development objectives. According to Sonnleitner (2011, p. 32), the ultimate goal of any destination is to influence possible tourists' travel-related decision-making through marketing activities and consequently attract them to their destination. Promotional activities, such as advertising, public relations, publicity, and sales promotions, are the most traditional promotional methods used to market a destination. In addition, the modern promoting methods through the Internet and interactive media have greatly influenced ways for promoting a destination. Kotler, Bowsen, and Makens (1996) classify two techniques that are used for promoting a destination, both *above* and *below-the-line* (Buhalis, 2000, p. 112). *Above-the-line,* the promotional activity must use all available channels: *television*, *training of personnel for promoting the destination, using newspapers, brochures, magazines, flyers, and Internet promotion*. Although costly using above-the-line advertising, (Bonham & Mak, 1996) argue it can assist in the development of destination branding and influence a vast volume of visitors to visit the destination or extend their visit. Advertisements use slogans, which frequently introduce change to tourism demand trends and update the image of destinations (Morgan & Pritchard, 1998). For example, the Sultanate of Oman recently changed its slogan from "*Essence of Arabia*" to "*Beauty has an Address*." This change reflects the refocus of Oman away from the traditional sun, desert, and sea as a product to a much more advanced offering based on natural, socio-cultural diversity, and the lifestyle of the local community. Additionally, destinations that use *below-the-line* promotional techniques such as participating regionally and globally in annual tourism exhibitions, such as WTM-London or ITB-Berlin have the opportunity to make business with intermediaries and meet members of the public to promote their offerings.

Destination Promotion and Social Media

Tourism development is inextricably linked to technological developments and challenges. Development in technology has been advancing at a rapid pace, resulting in structural change in the tourism industry and visitors' perceptions (McLennan & Ruhanen, 2008). Many global tourism organizations (DMOs) (e.g., governments of developing countries) will have had to adapt to the advancements in technological services to draw visitors to their destinations and to implement new ways of spreading information. Dwyer, Edwards, Mistilis, Roman, and Scott (2009) emphasize that destinations and tourism organizations that do not embrace the Internet and make the associated investments in information technology, expert systems, and computer programs will lose competitiveness. Recently, the key to destinations success is to collect social shares, positive user reviews and customer satisfaction on the Internet and social media. Both the Internet and social media have become the critical determinant in the success of many worldwide destinations, as both allow tourism organizations to promote and market their products and identify visitor's demands. As stated by Smeral (2008, p. 48), *“A country’s competitive position is decided by how its tourism destinations optimize their website in terms of information and easy booking and how it integrates its regional offer at a national level.”* In some developing countries, this is due to certain tourism services such as advertisements and area awareness campaigns that are out-dated and unsuccessful. This is found to be the case, particularly given the range of opportunities and challenges created by the emergence of social media, that destinations can use strategically.

The tourism industry is highly competitive. To benefit from the influence of social media on the tourism industry, turning to social media is vital for a tourist destination to promote itself globally. Social media, as one of the most powerful online networking tools, has significantly affected tourist destinations mainly by enabling new marketing strategies, leading to excellent results for destinations. It has seen exponential growth during the past decade. In addition, the rise of social media led to the development of two-way communication between destinations and visitors (current and potential). According to Zeng (2013), social media plays an increasingly important role in many aspects of tourism, such as information search, decision-making behaviours, and tourism promotion focusing on best practices for interacting with consumers via social media channels.

As in any other industry, social media platforms, such as Facebook, Twitter, YouTube, Instagram and apps to reach customers on their mobile devices, have grown in popularity over the past decades to become an integral component of a competitive tourism marketing strategy (COMCEC, 2015). These platforms are an extension of traditional word-of-mouth marketing (WOM) that has a significant impact on consumers' decision-making process and satisfaction (COMCEC, 2015). Also, the utilization of social media platforms has recently allowed many tourism organizations, both public and private, to increase their market size and reach a wide range of potential visitors particularly during global crises such as the pandemic COVID-19.

Social media continues to grow and increasingly influence destination marketing strategies. However, there have been challenges in using social media in tourism. Different destinations have different realities regarding the social media used for tourism management (Zeng, 2013). On the one hand, the importance of online marketing has not been fully recognised in tourism management. On the other hand, the tourism industry is generally facing great challenges in managing social media moving forward, such as developing a clear and measurable strategy, demonstrating the viable return of investment and integrating social media into business processes (Gonzalo, 2012).

2.4.2.1 Tourism Destination Image

The destination image is an essential process that influences the success or failure of the development of destination management and marketing in terms of attracting visitors to the destination and separating the destination from its competition (Haugland, Ness, Grønseth, & Aarstad, 2011; Mazilu, 2012b; Tasci, Gartner, & Cavusgil, 2007). As an interactive system of thoughts and opinions, Morrison (2013a) alludes to two types of images; the images that tourists have in their minds about destinations and the desired images those DMOs want them to have. Similarly, according to Rajesh (2013), the destination image process is made up of two components of the image: *organic images* and *induced images*. *Organic* images are formed by individuals themselves through past experiences with destinations and unbiased sources of information (i.e., news, reports, newspaper articles), whereas *Induced* images are created through information received from external sources, including destination advertising and promotion.

Moreover, Lee (2009, p. 217) reinforces the importance of tourism destination image in assisting managers by identifying the strengths and weaknesses of their destination, helping predict tourists' behavioural intentions, and providing critical insights for managing and developing tourism destinations. Hence, Avraham (2004) asserts that destinations that invest in the wrong image are likely to "*lose*" their competitive position in the future (Stylidis & Cherifi, 2018). Besides, a destination’s negative image will probably affect visitors’ decisions and force them to choose another destination with a more positive image. According to Shapoval, Wang, Hara, and Shioya (2018), destination image and attribute satisfaction have a significant impact on overall satisfaction and destination loyalty. Ahmed (1991) emphasizes that a precise destination image will ensure that visitors will not be surprised and disappointed on arrival. Consequently, tourism organizations (DMOs) need to build and maintain a positive image by having clear and proper planning in addition to development of destination multi-resources and tourist activities, community involvement, and reliable and effective marketing strategies.

2.4.2.2 Tourism Destination Branding

Destination branding represents the emotional component of the destination image (Ekinci, 2003). This key pillar in destination marketing is not only a trademark (logo, symbol, or icon) but also an experience, image, and a promise of many destinations, which signals a value system and positioning (Terzibasoglu, 2018). In this regard, Blain et al. (2005, pp. 331-332) define destination branding as *"the marketing activities that (1) support the creation of a name, symbol, logo, wordmark or other graphics that readily identifies and differentiates a destination; that (2) consistently convey the expectation of a memorable travel experience that is uniquely associated with the destination; that (3) serve to consolidate and reinforce the emotional connection between the visitor and the destination; and that (4) reduce consumer search costs and perceived risk. Collectively, these activities serve to create a destination image that positively influences consumer choice."*

In a highly competitive environment, the process of developing a successful destination branding is a more challenging and demanding activity (Hosany, Ekinci, & Uysal, 2006; Pike, 2005). In this regard, many determinants have to be taken into consideration to make the brand successful in involving all tourism organizations, which can create significant challenges in getting destination stakeholders to develop a coherent theme for the destination brand (Florek, 2005, p. 205). In addition, UNWTO (2007, p. 45) sets a range of challenges to have effective destination branding: 1) *budget limitations*; most tourism destinations do not have the financial resources to go head-on with commercial products for a share of discretionary consumer spend, 2) *political interference*; destination brands signal the personality of nations, and as a result, politicians often find it difficult to accept a rational and scientific approach to brand development without interfering with the brand strategy, 3) *volatile external environment*; which happens while destination brands can be defined and developed in a particular timeframe and context, external events (conflicts, disasters, etc.) that can impact profoundly on the brand's credibility and progress, 4) *delivery challenges*; delivering on the brand promise can be hampered by a lack of human capacity, infrastructure and a range of other delivery factors, 5) *corruption*; the brand strategy and values could be undermined by corrupt visitor practices and services such as bribery at immigration points, security check points, etc., 6) *differentiation challenges*; brand delivery has to be consistent over time, and the experience has to support the image created, making the brand believable and relevant – this depends on the cooperation and buy-in of a range of stakeholders. However, these major obstacles should not prevent destination managers from persisting in successful branding as it brings enormous benefits.

DMOs build the brand of a destination by defining and communicating its uniqueness and attractiveness to potential visitors and investors (OxfordEconomics, 2014, p. 19). The existence of effective destination branding makes destinations stand out among competitors, and, as a result, the destinations draw more tourists than they did before the brands were launched (Morrison, 2013a). Blain et al. (2005) have identified three reasons for the importance of destination branding: (1) clarifies and improves the image of the destination among potential visitors; (2) reinforces what potential visitors already perceive the destination regarding a unique image or personality; and (3) assists DMO in measuring achievements (Morrison, 2013a). Again, UNWTO (2007) sets some of the significant benefits of effective destination branding to involve destination awareness and demand creation, customer loyalty, commercial value, a base from which to coordinate private sector efforts, and image enhancement wider than tourism. Increasingly, many DMOs realize the value and power of strong destination brands by consistently delivering excellent value, therefore, brand loyalty increases and visitors return to the destination regularly (Page, 2014). However, developing a destination brand can be time-consuming and expensive. Various destinations, such as the GCC countries, have spent relatively large sums of money to research and develop successful brands (Clark, Clark, & Jones, 2010). Research conducted for the UN-World Tourism Organization (WTO) and European Travel Commission (ETC/UNWTO, 2009), *Handbook on Tourism Destination Branding*, reveals that the majority of Destination Management Organizations (DMOs), 82%, have an official brand strategy and a toolkit explaining how to apply their brand (80%), whereas 75% consider that they have developed a unique destination positioning (Morgan et al., 2012, p. 73). However, over a third of these organizations have got no plans to evaluate their brand strategy (Morgan et al., 2012). This statistic reveals much about the complex challenge posed by destination marketing evaluation and many DMOs' preparedness and ability to meet it (Morgan et al., 2012).

Destination Logo

The destination logo is a critical component of establishing destination brand identity and image and a new way to differentiate destinations from their competitors and establish connections with consumers. Blain et al. (2005, p. 337) emphasize that a well-designed logo drives support for the destination vision and mission among destination stakeholders and DMO members. For example, “*Oman-Beauty has an address*,” “*There's nothing like Australia*,” "*Sensational Brazil*" are examples of slogans used to attract visitors. Table 2.6 shows a list of famous tourism slogans from some countries around the world.

Table 2.6 Destinations Branding Campaigns and Slogans from around the World

Destination	**Campaign/Slogan**
Amsterdam	*Capital of Inspiration*
Australia	*There's nothing like Australia*
Bahrain	*Ours. Yours.*
Brazil	*Sensational Brazil*
Canada	*Keep exploring*
Cyprus	*The Island for All Seasons*
Dubai	*Definitely Dubai*
Egypt	*Where it all begins*
South Africa	*Inspiring New Ways*
Greece	*Greece, the true experience*
India	*Incredible India*
Las Vegas	*What Happens in Vegas, Stays in Vegas*
New York	*I love NY*
New Zealand	*100% Pure New Zealand*
Oman	*Beauty has an Address*
Paris	*Paris is for Lovers*
Qatar	*As Independent as You Are*
Scotland	*Welcome to Scotland*
Singapore	*Live It Up in Singapore*
Spain	*Everything Under the Sun*
Wales	*Wales Forever*

Source. Adapted from Baker and Cameron (2008)

2.4.3 Destination Tourist Products: Diversification, Quality and Development

The development of the tourism destination would not be possible without the tourist products, which are considered the initial motivation for the visitors to visit the destination. The effective use of these products makes the destination more competitive. According to Ritchie and Crouch (2010, p. 1054), destination resources and attractions are the key motivators for visitors to choose one destination over another. Such tourist products are a combination of various destination resources, elements, namely *destination attractiveness*, which is an excellent tourist attraction of natural, cultural-heritage or human-made (industrial); *facilities of destinations* (e.g., accommodation, transportation, and other services), and *destination accessibility*, the ease to reach these destinations. Nevertheless, the absence of these component's elements can lead to obstacles of varying degrees of severity, which impact destination development (Buhalis, 2000). Interestingly, Morrison (2013a) emphasizes that there are at least two main perspectives on what constitutes the destination product; (1) how the customer (visitor) views and perceives the product within the destination; and (2) the product itself with its tangible and intangible components. However, tourist products pose significant challenges for destination managers. First, most tourist products are intangible, cannot be tested before they are bought and experienced. Second, destinations exist both as holistic and as collections or individual products. Third, destinations are multi-functional (e.g., historic buildings, shopping facilities, sports facilities, and entertainment venues). These challenges may all be experienced by the same consumer segment, such as visitors, or individually by different consumers with special interests.

The diversification of tourist products is crucial for destination competitiveness in the global tourism market. Without diversification, a destination cannot be successful enough in a competitive market. Unlike regular product marketing, which delivers to customers, destination marketing consumers (who are visitors) move to the destinations to fulfil their preferences and needs. Importantly, tourist products are marketed and delivered directly to tourists by destination tourism organizations (DMOs). The DMO has a role in uniting and coordinating the work of different businesses in designing and realizing the products for their optimal quality, competitiveness, sustainability and achieving the best economic effects on the tourist market (Bosnić et al., 2014). Visit-England emphasizes that to create a thriving and suitable visitor economy, all the components that make a thriving destination need to be managed and integrated over the long-term, focusing on the needs of both residents and visitors (Morrison, 2018, p. 7). Thus, approaching the right target market and providing the appropriate tourist products to visitors is the vital element for successful destinations.

Moreover, another fundamental factor for destination competitiveness is the quality of tourist products that a destination needs to possess in developing sustainable products. As a result, the products can exceed tourists' expectations and one which ultimately dictates the success of the tourism destination. It is, therefore, imperative that DMOs both understand the expectations and needs of visitors and further design products and services to match and exceed those expectations (Kandampully, 2000). Hence, in managing demand and quality simultaneously, destination managers must be required to design and consider strategies that will facilitate the efficient management of both demand and supply of services as, unlike the goods manufacturing industry, service organizations are unable to increase the supply following the increase in demand. Importantly, when the demand for tourist products is higher than the destination's supply, the destination effectively loses its chance to serve those consumers

(Kandampully, 2000). Similarly, when the demand is less than supply, the destination loses revenue owing to unexploited resources.

The development of tourism products is central to strategic tourism development (Staden & Marais, 2005). The process is essential to keep up with tourism trends and to ensure constant rejuvenation of the destination supply for their viability and suitability and diversity of these products. Also, developing tourist products evidently leads to more targeted product and service offerings that, in combination with destination marketing strategy and improved internal stakeholder relations, increase visitor numbers and experiences (Reinhold, Beritelli, & Grünig, 2019). However, this development process cannot be done at once because it is a long-term process that requires various resources (e.g., financial, natural, human), knowledge of the global market, innovation, active promotion methods, and degree of satisfaction of visitors as well as local communities. According to Morrison (2013a), developing destination products requires two genuine aspects; 'hard' and 'soft' tourism product development. Hard development means building physical products such as attractions, hotels, and transports terminals, and others when soft development encompasses things that do not leave a long-term imprint on the physical landscape of the destination. These include preparing workforce development strategies, conducting training programs, designing packages, operating quality assurance programs, and providing interpretation services.

The development of tourist products must be managed for increasing competitiveness and sustainability of the destinations. Most commonly, DMOs from the demand side, get involved in product development activities, having overall responsibility for the entire destination supply, and at the same time, do not threaten the destination resources. According to Buhalis and Cooper (1998), DMOs should provide leadership in the development of innovative products and create local partnerships for the delivery of seamless experiences. However, their involvement, ranging from being a *bystander*; watching on as other tourism stakeholders do to the product development, *facilitator;* providing a basic level of information and advice for tourism stakeholders who wish to engage in product development, to the *instigator;* taking an active role in identifying opportunities for product development and finds strategies to realize these opportunities, and to become a *partner*; making a financial, staff or other resource investment in product development (Morrison, 2013a).

2.5 DEVELOPMENT OF TOURISM DESTINATIONS

Like other industries, tourism is an integral element for the economic development of many destinations, particularly developing countries, through identifying tourism impacts, supporting destination competitiveness and enhancing sustainable tourism development. Where developing the industry requires involving multi-activities, such as planning and management, to help achieve some of the destination's development goals. However, destination managers and policymakers need to accept that destination development is not a simple and predictable process, that both have large and clear challenges and impacts that can affect destination development.

2.5.1 Impacts of Tourism Development

Tourism destination development has the power to influence and shape destinations both positively and negatively in socio-cultural, environmental, and economic contexts. Jenkins (2015, p. 149) stated that the economic impact arising from tourism is immediate; it begins when tourists arrive and begin spending, while socio-cultural changes take much longer to emerge and are challenging to control and manage; some changes could be beneficial. Changes in the environment also tend to be long term. Notably, the boundary between the positive effects and negative is very narrow; they need to find the right balance. Hence, changes in these forces could encourage or inhibit tourism development. However, this could be different from one destination to another.

2.5.1.1 Economic Impacts of Tourism Development

Economic impacts are associated with destination development, which results in both positive and negative impacts on the environment and the communities. The positive economic impacts of the industry are conditional upon enhancing income and living standards, providing employment opportunities, creating and improving the level of infrastructure and services, making better use of resources, increasing local and foreign investments, promoting stability and competition, improving government planning, and stimulating private sector initiatives (Lawton & Weaver, 2010; Mason, 2012; Sharpley, 2003). Beyond this, the development process may contribute significantly to economic growth through increased investment in human capital, resulting in bringing about an accumulation of physical and financial capital. In contrast, tourism development has the potential for negative outcomes at the national level. The most harmful effects of tourism impacts are inflation, opportunity costs, prevention of the creation of other productive industries, and low investment returns due to the seasonal nature of tourism. In addition, the increase in demand for more tourist products and services may result in an increase in prices and the cost of living. This can lead to a threat that if tourism or other businesses are not local, the profits are exported out of the destination local community. As shown in Table 2.7, Kreag's study summarizes the overall positive and negative economic impacts of tourism development (Kreag, 2001).

Table 2.7 Economic Impact of Tourism

Positive Impact	Negative Impact
• Contributes to income and standard of living • Creates new business opportunities • Economic impact (direct, indirect, induced spending) is widespread in the community • Improves investment and infrastructure spending • Improves local economy • Improves public infrastructure and facilities • Increases employment opportunities • Increases tax revenues	• Cost for additional infrastructure and public services • Increases cost of living • Increases potential for imported labour • Increases the price of goods and services • Jobs may pay low wages • Profits may be exported by owners • Seasonal tourism creates high-risk, under or unemployment issues

Source. Adapted from Kreag (2001) and Al-Masroori (2006)

2.5.1.1 Environmental Impacts of Tourism Development

The environment is a valuable asset in attracting tourists to destinations, reflecting on the rise of tourism development. Thus, it is imperative to balance both nature protection and tourism development as a central point of interest in all future activities. Like other forces, tourism development has both positive and negative impacts on the environment as stated by authors such as Holden (2000), Mason (2012), and Weaver and Lawton (2006). According to those authors, development of the tourism industry provides the necessary motivation and money for preserving cultural and historical sites and conserving the natural sites and resources for the continued enjoyment of both visitors (international tourists and residents). In order to be successful, destinations must give full attention to protecting their environmental resources through controlling tourism development process. For example, many developing countries in Asia and Africa have established large natural parks for wildlife, as it has been proven that wildlife is the most popular tourist attraction in those countries. Crucially it must be noted that without the economic return provided by tourism, natural sites such as mountains, forests, and beaches might be converted to mining or other forms of industrial development of natural resources, which would cause significant harm to the natural environment and ecosystems.

On the other hand, tourism causes negative impacts on the environment when the number of visitors is greater than the environment's ability to cope with visitor volume. The industry faces some environmental challenges, namely, high rates of greenhouse gas emissions from air travel, water consumption, waste generation, ecosystem degradation, and related social implications. In addition, some of the consequences of exceeding the environmental capacity may lead to oil spills from cruise ships, and untreated wastewater may hurt the aquatic ecosystem. Air pollution may also result from excessive use of vehicles (cars, buses, and motorcycles) by tourists at tourist sites. Noise and litter are probably the most common result of tourism and certainly the most noticeable. Sometimes certain types of tourist attractions such as amusement parks may generate noise that is unacceptable and irritating to the local communities. In this regard, protective measures must be taken through ensuring the protection of the site's natural resources, avoiding tourist overload, preventing pollution, and respecting the needs of the local population.

2.5.1.2 Socio-Cultural Impacts of Tourism Development

The socio-cultural impacts focus on changes in the quality of life of the communities in destinations, cultural practices, and traditional ideas and values, norms, and identities resulting from tourism (Brunt & Courtney, 1999; Glasson, Godfrey, & Goodey, 1995; Mbaiwa, 2005). Socio-cultural impacts can benefit the quality of life such as learning, awareness, appreciation, family bonding, and stronger cultural identity (Besculides, Lee, & McCormick, 2002). Notably, the tourism industry has the potential to promote social development through employment creation, income redistribution, and poverty alleviation. The creation of community facilities and contribution to cultural exchange should help in preserving the cultural identity of the host culture (Pizam, 1978). Other benefits include upgraded infrastructure and facilities, and public spaces, as well as an influx of better-quality commodities and food. Again, the tourism industry may help in reducing negative perceptions and stereotypes: increasing tourism activities will improve the reputation and visibility of the host community to outsiders (tourists), increase social contacts, promotes new values and ways of life, and develop a positive attitude towards each other (host and tourists). However, due to the pace of tourism development, tourism can contribute to the spread of some negative values such as overtourism, prostitution, smuggling, alcoholism, conflict and racism, crime, and the spread of disease, e.g., the current pandemic COVID-19. Again, using facilities and resources in the destination, tourists can have a severe impact on the host's daily life such as water shortages, possible friction between visitors and the host communities over shared usage of local facilities, additional demands on social services and supporting infrastructure, and conflict of land use that leads to segregation where tourists stay in luxurious areas isolated from the host's residences.

2.5.2 Tourism Destination Competitiveness

The old notion for destinations to compete, and be successful in the international tourism industry, was to have tourists, destination resources, low salaries (low labour costs), and attractive exchange rates (Bordas, 1994). This approach, however, has changed as the increase in international tourism has led to increased competition among tourism destinations in the global tourism market. The destination competitiveness process is to ensure satisfaction for tourists, economic and employment benefits for tourism professionals, and higher living standards for the population at a higher level than its competitors (Terzibasoglu, 2018; Tőzsér, 2010). Ritchie and Crouch (2003, p. 295) have viewed a destination's competitiveness as "*a destination's ability to create added value and thus increase the national wealth by managing assets and processes, attractiveness, aggressiveness and proximity, and thereby integrating these relationships within an economic and social model that takes into account a destination's natural capital and its preservation for future generations.*" Moreover, destination competitiveness is created and enhanced through specific development policies and strategies, including marketing, management, product development, environmental quality, and sustainable tourism (Buhalis, 2000; Ritchie & Crouch, 2003; Yoon, 2002). A destination's competitive strength also lies in distinctive competencies that they possess relative to other competitors (Mazilu, 2012b; Presenza, 2005).

The competitiveness of any destination is affected by the competitiveness of other destinations. According to Baker and Cameron (2008), 70% of international tourists visit only 10 major tourist destinations, leaving the rest of the tourism organizations to compete for a share in the remaining 30%. Thus, in order to assure destination competitiveness, Ritchie and Crouch (2003) emphasize that any destination can be competitive when it has a robust capacity to increase tourism expenditure and the numbers of visitors whilst providing them with quality services and satisfying experiences while enhancing the well-being of the host populations and preserving the natural and cultural resources (Lidia Andrades, Dimanche, Vapnyarskaya, & Kharitonova, 2015). A destination's ability to compete relies heavily on some determinants of competitive advantage in the tourism industry. Authors such as Mazilu (2012b) and Dwyer and Kim (2003) have determined the main elements in ensuring the competitiveness of the tourist destination to include: destination's multi-resource and visitor services, the management of the destination (DMOs), situational conditions (e.g., competitive environment, the destination location, global environment, price competitiveness, safety/security), market performance indicators (e.g., number of visitors and their expenditure, the contribution of tourism to the economy, tourism investment, government support). These primary elements of destination appeal and the key motivators for visitation to a destination, are the fundamental reasons why potential visitors choose one destination over another. Therefore, the existence of effective management in these elements should lead to sustained destination competitiveness and growth.

Satisfaction with destination products and services is an important consideration to destination management and marketing by recognising that stakeholders' satisfaction influences the success of the destination. The satisfaction of the local community and visitors (tourists) with a destination is considered the primary and direct link to achieve success in tourism. Tourist satisfaction is one of the prime variables to sustain competitiveness in the tourism industry because it affects the choice of destination, the consumption of products and services, and the decision to return (Kozak & Rimmington, 2000). Pizam, Neumann, and Reichel (1978, p. 315) propose a definition of tourist satisfaction as: "*the result of interaction between a tourist's experience at the destination and the expectations he or she had about that destination"* (Shapoval et al., 2018, p. 313).

2.5.2.1 Framework for Destination Competitiveness

Ritchie and Crouch (1993) assert that for the tourism industry to be profitable now and in the long term, its development and management should be according to a new competitiveness paradigm (*Model of Destination Competitiveness*), as illustrated in Figure 2.6. The core of destination management is to make sustainable use of the comparative advantages available in a way that creates competitive advantages (Crouch & Ritchie, 1999). The main strength of the proposed model lies in its ability to integrate all essential factors that may characterize the competitiveness of a tourism destination. The model links together the macro and micro-environment factors and consists of five components where each of these five categories is further broken down into sets of the indicator. The *destination management* component of the model focuses on those activities which implement the policy and planning framework established under *destination policy, planning and development*, which enhances the appeal of the *core resources and attractors*, strengthening the quality and effectiveness of the *supporting factors and resources*, and adapts best to the constraints or opportunities imposed or presented by the *qualifying and amplifying determinants* (Ritchie & Crouch, 2003, p. 73). These activities represent the most significant scope for managing a destination's competitiveness as they include programs, structures, systems, and processes that are highly actionable and manageable by individuals, organizations, and collective action (Ritchie & Crouch, 2010).

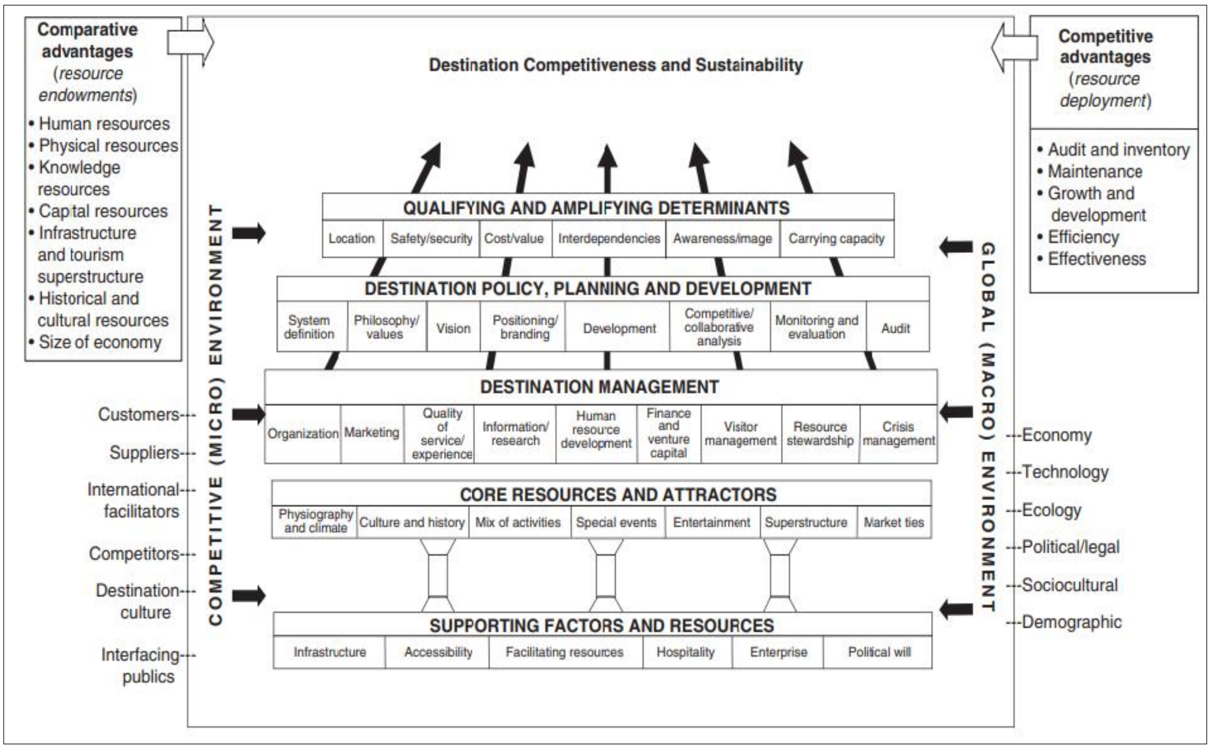

Figure 2.6 Conceptual Model of Destination Competitiveness and Sustainability
Source. Ritchie and Crouch (2003, p. 63)

2.5.3 Sustainable Tourism Development

Tourism is increasingly becoming an agent for sustainable development. Where understanding the role of tourism in the development of a particular area is firmly related to the concept of sustainable development (Mezei, 2009, p. 53). The concept of sustainable tourism development (STD) has emerged as a broad concept for ensuring that tourism grows in a fashion that does not permanently damage the environment, society, and the culture of the destination (Morrison, 2013b). Butler (1993, p. 35) provides a comprehensive definition of sustainable tourism development (STD) as: *"Tourism which is developed and maintained in an area (community, environment) in such a manner and at such a scale that it remains viable over an indefinite period and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and well-being of other activities and processes."* Besides, five pillars are working on the sustainable development of the tourism industry (UNWTO, 2013): tourism policy and governance, economic performance, investment and competitiveness, employment, decent work and human capital, poverty reduction, and social inclusion, and sustainability of the natural and cultural environment.

Moreover, having quality and systematic destination management is necessary to create a sustainable tourism destination as a long-term approach development. Page (2014) emphasizes that sustainable tourism development with proper management and planning would ensure that the destination maintains its environmental integrity. This long-term process of destination management implies an optimal economic development of a destination, a higher level of life standard, ecological conservation and socio-cultural preservation (Krce Miočić et al., 2016; Pearce, 2015). In addition, the success of sustainable tourism development requires the participation of all relevant stakeholders of the destination to ensure broad involvement and consensus-building.

2.6 DESTINATION ECONOMIC DEVELOPMENT

As a means of economic development, tourism is considered a lasting resource, which can positively influence economic development in many developing countries resulting in the long-term development of the destination, improving society's living standards, and its competitiveness. According to UNWTO (2006a), there has been a widespread increase in the geographical expansion of tourism globally, making it possible for many developing countries to develop tourism at their own pace for their own economic advancement. Thus, the influence of tourism development is vital in contributing to the economic growth of these countries to include, e.g., diversifying governments' sources of revenue, providing opportunities for business and employment, and reducing the country's dependence on the primary sources of revenue, such as natural resources of oil and gas. This is certainly one reason why tourism persists as part of government development strategies in those countries.

Economic development is the process of growing the country's output along with improvement in the welfare of citizens; therefore, its scope is broader than economic growth, which focuses on rising a country's national income and output level (DFID, 2008; WorldBank, 2019). Pass, Lowes, and Davies (1993) identify economic development as a process of economic transition that involves, first, the structural transformation of an economy and, second, the growth of an economy's real output over time (Mihalic, 2002). Furthermore, although the process of economic development can be measured through various economic indicators, the GDP is mostly used as an appropriate economic indicator to represent the outcomes of economic development on the country's national level. This economic indicator provides a change in the economy through its growth rate for various sectors.

Tourism is increasingly being seen as an essential means to meet the country's development goals. In the context of developing countries, the importance of tourism for economic development has been acknowledged. The industry provides a significant stimulus to economic development both economically and socially by stimulating employment and investment, transforming the economic structure, and making positive contributions towards the balance of payments and, eventually, the GDP (Mason, 2020). According to Dimoska (2008), tourism export represents an average of 80% of the industries that have contributed to their economic development to a great extent. Brown (1998, p. 59) emphasizes that the industry is preferred to other types of economic activities due to its connections with the absence of real alternatives, the lack of financial resources, productive industries, and technological resources in developing countries. The industry has the highest category of global trade, according to UNWTO (2006a) and represents over 40% of all services exports. Additionally, the industry has shown the ability to stimulate a country's industrial sectors through linkages and cross-sector synergies, with other service sectors like hospitality, transport, construction, entertainment, and the like (Tungbenchasirikul et al., 2020). Moreover, with a focus on tourism, the Huron Business Development Corporation (HBDC) listed a number of factors for successful economic development, which include political stability and commitment, investment in infrastructure, effective policies and planning, broad participation by all stakeholders and the promotion of entrepreneurship and partnerships.

Tourism development and activities are primarily measured by the industry's contribution to the country's economy and employment opportunities (WorldBank, 2019). However, the industry's contribution may vary from one destination to another according to priorities and level of development and the importance of the country's tourism industry. Bunghez (2016) emphasizes that numerous factors influence the amount of tourism contribution to a destination's economy: the degree of infrastructure development, the management abilities of local authorities and private investors, and destination marketing abilities. Interestingly, Mihalic (2002) argues that tourism's contribution to GDP might be minimal in some advanced economies, while in some developing destinations, tourism might create a significant share of GDP and employment. As a point of consideration, over the last two decades, the industry grew considerably faster in developing countries than in developed economies, due partly to increasing disposable income and the fact that travel is now relatively less expensive and accessible (ETC/UNWTO, 2009). In many developing countries, tourism contributes up to 25% of the national GDP (GIZ, 2014). The UNWTO (2006b) report also shows that the industry's contribution to economic growth and development was estimated to have accounted for 3%-10% of the GDP in developing countries (Akan, Arslan, & Işık, 2008).

The revenue generated by tourism development is vital to the economy of a destination by the contribution of three elements or the multiplier effects (Bunghez, 2016, p. 4). The multiplier effect of tourism is linked with a broad range of economic activities, as shown in Figure 2.7. These different activities are undertaken at the three levels of tourism impacts (direct, indirect, and induced) on an economy. The first element, *direct*, measures the effects of the first round in the monetary circuit derived from visitors (e.g., spending on transportation, accommodation, entertainment). The next element, *indirect*, measures the derivative effects of additional rounds caused by the recirculation of the tourist first monetary unit (e.g., expenditure on food and beverage suppliers to tourism enterprises). The third element, *induced*, measures the derivative effects caused by a tourism organization's employees who spend a portion of their wages in other sectors (e.g., the expenditures of those who are directly or indirectly employed by the tourism sector). Concluding, the total economic contribution of tourism is equal to the effects of the direct impact plus the indirect impact, plus the induced impact of tourism spending. These impacts can often be mostly divergent between countries, based on the structure of the tourism industry. Notably, according to Minciu (2004), the multiplier effects of tourism take values of 3-4 times lower in underdeveloped countries as opposed to the developed ones.

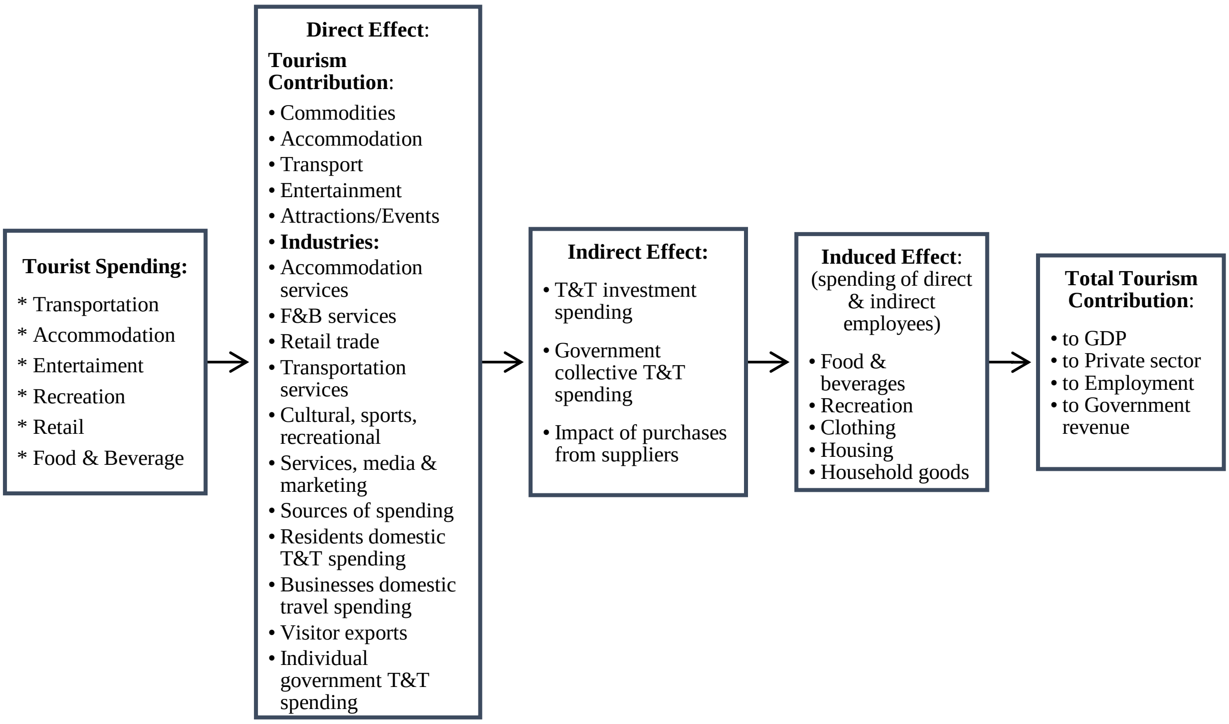

Figure 2.7 Effects of Tourism Contribution to the Country's Economy
Source. Adapted from OxfordEconomics (2014, p. 3)

2.7 CONCEPTUAL RESEARCH FRAMEWORK

The theoretical backdrop in the literature review has provided the basis for the conceptual framework that would fill the empirical research gap in the development of tourism destinations, particularly developing countries such as the empirical case study: *the Sultanate of Oman* (the details in Chapter 4): *How can a framework be developed to measure, describe and understand the interrelationship and interdependence effects between tourism development (TD) and destination management (DM) and their influences on the destination's economic development (DED)?* Hence, there is a need to explore and develop a complementary framework that conceptualizes and identifies variables and critical factors crucial for building a successful tourism destination, namely: appropriate and effective DMO; effective destination marketing and promotion; destination competitiveness; destination planning and policy, destination stakeholders' participation and satisfaction, destination resources, and tourist products and services, impacting a destination's ability to show the integration in building a significant economic development.

The framework is intended to apply to destinations, characterized as being in the development stage. According to the TDLC model by Butler (1980), the development stage is where there is a continued growth in visitors' numbers, the development of tourist facilities, and increased promotional efforts. Significantly, in some cases, the model might not be necessary to utilize every step and stage. There might be a need to modify the model to fit a particular destination. In this regard, Figure 2.8 illustrates the process followed for destination development analysis in this study. It presents a broad conceptual framework identifying components (elements), connections, and processes to be addressed at a macro level rather than a micro level to provide a holistic understanding of the issues related to the influence of interrelationship and interdependence effects between tourism development and destination management on economic development at a national level. Moreover, the interactions and connections of all critical elements within the destination are non-linear and will influence the development process of the tourism industry. Each of these elements, therefore, needs to be understood before establishing development goals and/or implementing planning and management processes.

2.7.1 The Research Framework Stages

As a result of this review process, a proposed framework (Figure 2.8) was adopted to guide and inform this research. For the study objectives, the framework is based on analysing four key dynamic and interrelated stages: 1) tourism destination management, 2) destination stakeholders’ economy, 3) tourism’s contribution to destination's economy and the last stage, 4) the effects of tourism development on the destination's economic development. The specific elements of each major stage provide more useful/practical guidance to those who are responsible for the destination's tourism development and management, like destination managers and policymakers. In the first two stages, the key themes in the framework are connected by lines with double-pointed arrows showing that an integrated approach is necessary when assessing the components needed for tourism development management, and it is also necessary for the actual implementation phase of tourism development. In contrast, the last stage is connected with lines that have but single-pointed arrows showing convergence in the outcomes to be attained. These connecting lines have keywords written across them, indicating the essential actions that need to be undertaken at the different stages for this framework to be realizable and the expected outcomes at the last stage to be attained. Moreover, the interconnections indicate the relationships between the central constructs, while the double way arrows influence and are influenced by other variables, the development and management of the tourism destination components. However, it should be noted that not all variables of tourism development and destination management will be measured or described in the study.

STAGE I: Tourism Destination Management

This stage shows the essential aspects of a tourism destination, which are planning and policies, management, marketing and promotion, stakeholders, and products and services. Importantly, this stage also identifies the destination resources as a critical component of the industry that influences the actions of other components. As shown in the framework, tourism organization (DMO) performs a crucial role in uniting and promoting the involvement of all these aspects and serving their different interests. The DMO's ability to foster the process is mainly based on the number and quality of relationships with tourism destination stakeholders for mutual benefits through setting up the policies and regulations for tourism investments and the formation of tourism products and services. According to UNWTO (2007), the primary purpose of a DMO is to lead and coordinate activities under a coherent strategy to manage and market their destination to potential visitors and provide economic benefit to the local community. As in most, if not all, developing countries, the DMOs are the government to undertake management duties under their remit, e.g., the Ministry of Tourism in Oman, the case study.

STAGE II: Destination Stakeholders' Economy

Destination key stakeholders' involvement for the success of the destination development process is the key area in the framework. They intend to incorporate their views and aspirations in destination policies and planning to gain more socio-economic benefits from the industry. The stakeholders' economy reflects the transition in the way destinations are managed, the influence of tourism development and destination management to bring together the local community, visitors, tourism businesses, and the government authorities to realize the benefits of tourism development. First, *the relationship between visitors and tourism businesses* appears in the way that tourism businesses provide products and services necessary for visitors. The movement of visitors to a destination requires supporting tourist infrastructure, e.g., transportation, amenities, which can also benefit local communities by sharing facilities provided for visitors. The visitor supports quality of life in the ways that visitor spending helps support a broader and higher-quality set of local amenities and supports new investment in local attractions. Secondly, *the relationship between the local community and tourism businesses:* tourism stimulates economic growth by the increase in the number of jobs in that tourist destination, both directly and indirectly, within the tourism developers. Support industries and professions also contribute substantially to the local economy. The creation of new employment opportunities generated by the development of a destination results in an increase in the standard of living among the local community, which, in turn, leads to an increase in their spending (domestic tourists). Thirdly, *tourism businesses and tourism contribution:* tourist destination can bring revenues to the country's budget in the form of taxes and fees paid by tourism businesses that operate around such attractions and other activities.

STAGE III: Tourism Destination Contribution to the Destination Economy

The third stage explores identifying the direct and indirect contribution of tourism to the destination's economy. The direct contribution of tourism is the value generated, which affects the destination's economic growth, by the provision of tourism-related services and products resulting from visitors' interactions with their destination, the local community, and tourism businesses and developers. For example, the resulting visitor spending supports jobs, incomes, tax revenues, and local businesses that represent part of the country's economy. The second broader element, in contrast, takes into account indirect contributions from other sectors of the economy reliant on or supporting tourism activities.

STAGE IV: Effects of Tourism Development on Destination Economic Development

Successful tourism bringing in new life into communities and the governments, and creates opportunities for businesses to establish new services and products centring on tourism. The last stage of the framework is a focus on the effects of tourism development on the destination's economic development. These effects can drive effective economic development through several channels and influences attained in the tourism development process.

- *Economic diversification* is imperative when a given economy is heavily dependent on a single or small number of sectors (Sharpley & Vass, 2006). In addition to bringing prosperity to an economy, tourism also allows governments to diversify their sources of income and rely less on a single industry. Especially with the one source-based economies such oil in the GCC countries, an unexpected economic crisis in such a single sector may result in a significant socio-economic crisis that could evolve into political turmoil (Henderson, 2006).
- *Generating/expanding the size of tourism markets* by generating higher levels and quality of tourist products and services, and in some cases, reducing the cost and lowering prices of these products and services in the destination as well creates higher-ranked levels of services offered by both public and private sectors.
- *Expanding employment opportunities*: The tourism industry provides a large number of employment opportunities to a wide variety of skilled professions, from top managerial positions to unskilled employees.
- *Generating income* through tourism investments that improve the local economy (GDP) and the quality of life for the local community. Tourism growth in any economy not only leads to economic development but also leads to advancements in other parts of the host country, such as the political, cultural, and social environment.
- *Infrastructure development.* The solid infrastructure and better facilities support economic development to bring in more visitors and increase the satisfaction of the local communities.
- *Social and Environmental benefits.* Tourism can encourage the preservation of traditions at risk of destruction or change. In addition, it provides financial support for the conservation of ecosystems and natural resource management, making the destination more authentic and desirable to visitors. It also adds more value to the local tourism business.

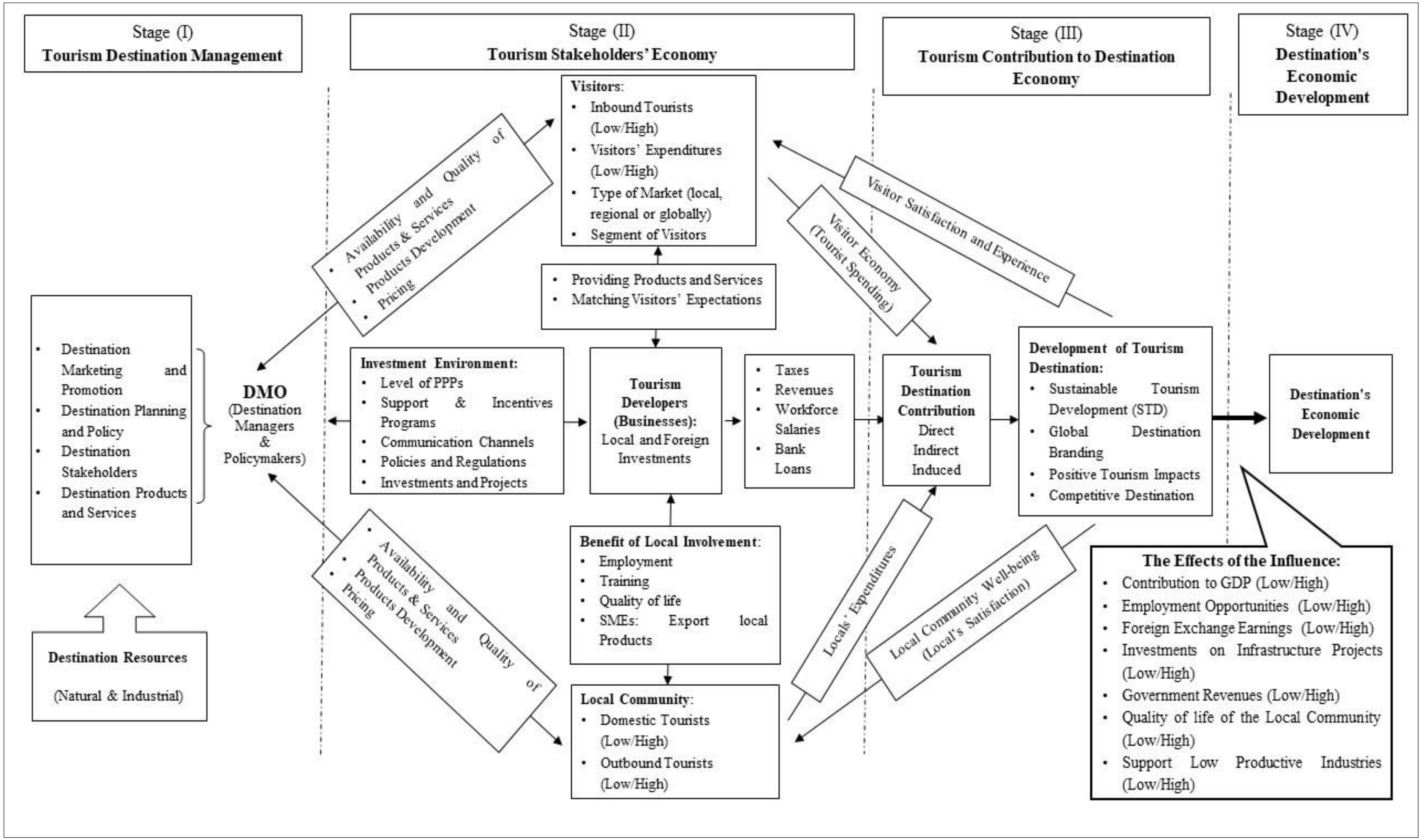

Figure 2.8 Flow of the Effects of Tourism Development and Destination Management on the Economic Development in a Developing Country
Source. Author

This proposed framework can be used to analyse a single destination and its activities over time. Reflecting on the research model (Figure 1.2), stages (I, II, and III) present the interrelationship between tourism development and destination management through the significant aspects (elements) that jointly integrate and interrelate to influence the destination economic development (Stage IV). Practically, the model allows destination authorities (DMOs), in collaboration with other stakeholders, to highlight the significant opportunities in the development process and identify the main challenges to the development of a destination. Besides, destination managers and policymakers may apply the model to perform a destination audit, for instance, the application of the model to the case of Oman (see *section 8.3.2.3.1*). This should make the DMO more aware of potential areas of concern from key stakeholders who expect these activities to be undertaken. In this way, the efforts of tourism stakeholders need to be coordinated to maximize destination competitiveness and sustainability. Thus, the model can be used as a tool to benchmark destination activities against the activities of other destinations.

2.8 SUMMARY

This chapter addresses the theoretical objectives of the study by identifying the underlying issues and gaps in existing and related literature. This shows the importance of destination management to destination development, and highlights the issues related to tourism development and its impacts. It also presents the conceptual framework derived from the literature of this research.

Based on the outcome of this chapter, the next chapter will explain in detail the research design and methodology approaches employed to answer the research questions and test the proposed conceptual framework.

CHAPTER THREE: METHODOLOGY & RESEARCH DESIGN

3.1. INTRODUCTION

This chapter discusses in detail the research strategy (methodology) approaches used for this thesis to answer the research questions and test the proposed conceptual framework. As shown in Figure 1.3, the study investigates the influence of the interrelationship and interdependence effects between tourism development (TD) and destination management (DM) on economic development (DED) in developing countries. Table 3.1 illustrates the link between the research objectives, questions, and techniques for data collection and analysis. Saunders, Lewis, and Thornhill (2009, p. 90) define research methodology as a general plan of how the researcher will answer the research questions. The research questions guided the process of data collection and analysis, interpretation, and discussion of results. This chapter presents the philosophical and strategic approach adopted in conjunction with the case study. A research methodology was thus selected that would address the research objectives while reinforcing the theoretical underpinning of the study, explain the purpose, logic, and process of the research. This chapter explains sampling and data collection, as well as detailing validity, reliability, and triangulation considerations pertaining to the statistical analyses. The chapter ends with a discussion of ethical considerations relating to the data analysis procedures.

The "*Research Onion,*" Figure 3.1, is a research model for selecting and explaining the research methodology. The model consists of a series of stages, explaining various layers of the research process. Saunders, Lewis, and Thornhill (2012) noted that while using the research onion, one has to go from the outer layer to the inner layer. When viewed from the outside, each layer of the onion describes a more detailed stage of the research process (Saunders, Lewis, & Thornhill, 2007).

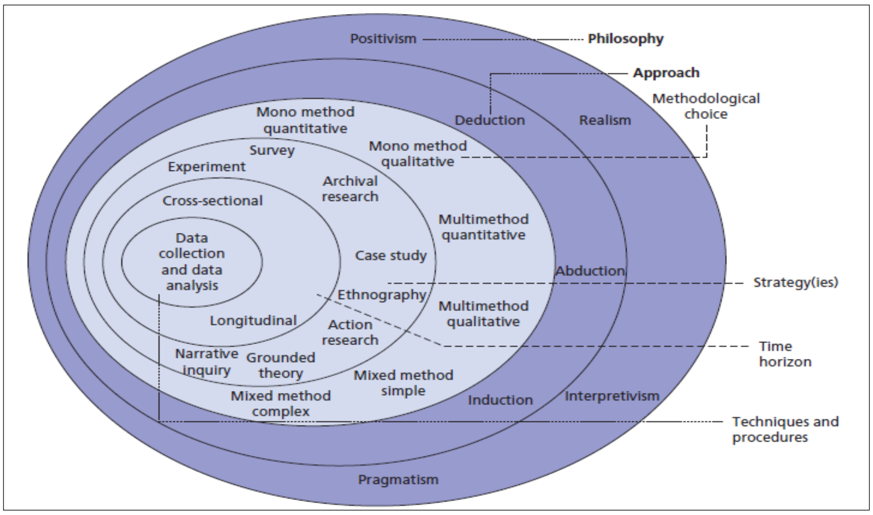

Figure 3.1 The 'Research Onion' Model
Source. Saunders et al. (2009, p. 108)

Table 3.1 Research Aim, Objectives, Questions, and Methods

<table>
<tr><th>Objectives</th><th>Questions</th><th>Sub-Questions</th><th>Data Collection Techniques</th><th>Data Analysis</th></tr>
<tr><td rowspan="5">1. To understand the contribution, impact, and evolution of the tourism sector to the economic development of Oman.</td><td rowspan="5">1. To what extent are the tourism sector and economic development related?</td><td>1. To what extent does the tourism sector contribute to the GDP?</td><td>• Interview: Government Officials & Tourism Businesses Managers
• Document Analysis (Government Reports and others)</td><td rowspan="5">- In-depth content analysis
- NVivo
- SPSS</td></tr>
<tr><td>2. To what extent does the tourism sector contribute to providing employment opportunities in the market?</td><td>• Questionnaire: Local Community.
• Document Analysis (Government Reports and others)</td></tr>
<tr><td>3. What are the impacts of the tourism sector on the development of the economy?</td><td>• Interview: Government Officials & Tourism Businesses Managers
• Questionnaire: Local Community.
• Document Analysis (Government Reports and others)</td></tr>
<tr><td>4. What are the procedures and practices the Omani government must adapt to introduce a cohesive and economically viable tourism sector that contributes to a more developed economy?</td><td>• Interview: Government Officials & Tourism Businesses Managers
• Document Analysis (Government Reports and others)</td></tr>
<tr><td>5. How have the destination resources been exploited in supporting Oman’s economy?</td><td>• Interview: Government Officials & Tourism Businesses Managers
• Questionnaire: Local Community.
• Document Analysis (Government Reports and others)</td></tr>
<tr><td>2. To highlight opportunities for attracting local and international businesses in tourism projects and investments, and to examine the contradictions and challenges facing the development of the sector.</td><td>2. What are the factors impacting on investments in the tourism sector?</td><td>1. What are the government incentives to the investors?
2. What are the challenges that need to be considered to improve investment in the tourism sector?
3. What kind of projects and investments have been done in the tourism sector?
4. To what extent do government laws and regulations affect investments?
5. How has Oman tourism responded to the competitive environment?</td><td>• Interview: Government Officials & Tourism Businesses Managers
• Document Analysis (Government Reports and others)</td><td>- In-depth content analysis
- NVivo</td></tr>
</table>

Objectives	Questions	Sub-Questions	Data Collection Techniques	Data Analysis
3. To examine how different marketing methods can be used by both private and public sectors to attract a higher number of tourists and become a preferred tourist destination while also enhancing the country's competitiveness by attracting new investors.	3. To what extent have the marketing strategies and programs stimulated visitors to visit Oman?	1. What are the marketing strategies that the tourism sector has adopted to promote Oman regionally and internationally? 2. To what extent are the destination image and branding developed? 3. What are the tourism products and services that are provided to visitors? 4. To what extent are the visitor's demands and the destination supplies in agreement?	• Interview: Government Officials & Tourism Businesses Managers • Questionnaire: Local Community & Visitors	- In-depth content analysis - NVivo - SPSS
4. To assess the practices, regulations, and prospects of tourism destination management, marketing, and development by both the public and private sectors.	4. What are the practices that the public and private sectors should adopt to create collaborating environments?	1. How has the Omani government policy and strategy affected the tourism section in Oman? 2. What are the enablers and barriers to the success of Oman Tourism 2040? 3. What is the extent of the partnership between the public and private sectors? 4. To what extent does the Omani government control the tourism sector? 5. To what extent does the private sector participate in setting visions and objectives?	• Interview: Government Officials & Tourism Businesses Managers • Questionnaire: Local Community • Document Analysis (Government Reports)	- In-depth content analysis - NVivo - SPSS

Source. Author

Based on the onion model stages, this research methodology has identified four stages. The research nature and philosophy constitute the first stage, the starting point for the appropriate research approach (see *Figure 3.2*). Other stages of the research strategy are research methods in the second, and the third at which the data collection methodology. The fourth stage identified the research analysis stage.

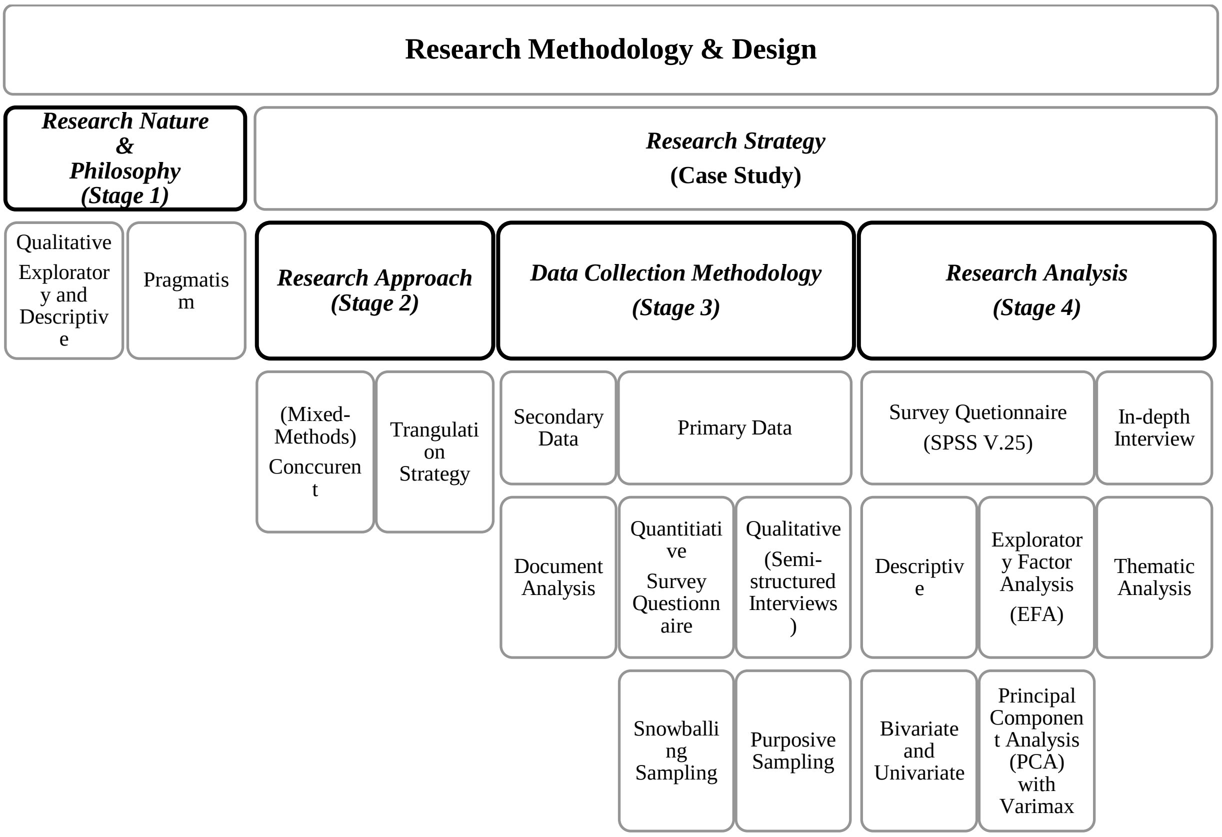

Figure 3.2 Research Methodology
Source. Author

3.2. RESEARCH DESIGN

A research design is a structure of procedures and operations to study the conceptual research problem efficiently. According to Wahyuni (2012), the research design becomes essential to connect a methodology and research methods to address research questions to examine social phenomena. Based on the research purpose, three types of research projects have appeared: *exploratory*, *descriptive*, and *explanatory*. However, the purpose may fall into a single category as well as combine two or all three categories (Saunders et al., 2012, p. 171). The exploratory design uses an “open question” to have a clear understanding of the issue (Saunders et al., 2012, p. 171). This approach is the most appropriate when the researcher knows little about the issue being investigated (Jennings, 2010) and when the problem is not well understood (i.e., very little existing research on the subject matter). Alternatively, the descriptive research (conclusive research) design is used to gather "events, person, or situations" data precisely (Saunders et al., 2012, p. 171). The explanatory research design (casual research or the study of cause and effect) is used to identify the relationships between "one variable and another variable."

3.2.1. Research Philosophy (Paradigm)

The research philosophy is the development of the research background, research knowledge, and nature (Saunders et al., 2012). Bryman (2008b, p. 696) describes the research paradigm as "*a cluster of beliefs and dictates what should be studied, how research should be done, and how the results should be interpreted.*" This addresses how reality is seen, and how we obtain knowledge (Bryman, 2007). The research paradigm is classified into three essential philosophical components: *ontology*, *epistemology,* and *methodology* (Easterby-Smith, Thorpe, & Jackson, 2012; Guba & Lincoln, 1994). These philosophical components, as explained later, enable any researcher to decide which approach (paradigm) should be adopted. In this regard, Grix (2004, p. 68) suggests that research is done best when the researcher starts by clearly identifying the relationship that could be researched (the ontological dimension), where after the link is made with what is already known about the topic (epistemological dimension) and then proceeding with how the research is going to be conducted (the methodology).

3.2.1.1 Research Ontology

A substantial element of the research design is whether the research should employ objectivist (deductive) or constructivist (inductive) approaches. The nature and applicability of these are entirely different from each other (Goddard & Melville, 2004). The choice is entirely dependent upon how the researcher is dealing with the subject matter. Adopting the *quantitative* philosophy leads to the utilization of the deductive approach with an exact research methodology, such as surveys. *A deductive approach* aims at finding the answer to a particular question or statement that is already available. The approach is characterized by a highly structured methodology through operationalization and generalization (Saunders et al., 2012, p. 145). A highly structured methodology will lead the researcher to an efficient data collection by using a questionnaire to gather data. The required operationalization will facilitate measuring the data accurately, and lastly, the act of generalization is significant to obtain a broad selection sample of the population. Also, in a deductive approach, the scope of observation is narrow as compared to the inductive research approach.

On the other hand, adopting a *qualitative* philosophy leads to the use of an inductive approach with an accurate research methodology, such as case studies. The *inductive approach*, also known in as inductive reasoning "qualitative type of research," starts with observations and theories are then proposed towards the end of the research process as a result of the observations (Goddard & Melville, 2004). This approach involves the search for a pattern from observation and the development of explanations – theories – for those patterns through a series of hypotheses (Bernard, 2011). Here, the researcher assesses the statement by an already propounded theory; or intends to create or form any new theory. The possibility of observing and analysing the situation is very high and might change the thought process, and the current mind-set could be changed accordingly.

Given the focus of this study, understanding the influence of the effects between tourism development and destination management, and how it will affect the economic development in developing countries, the qualitative approach, inductive, is deemed useful and appropriate. However, the research design for this study does not entirely lend itself to an inductive approach; therefore, this research adopted a mixture of inductive and deductive approaches to conducting the study.

3.2.1.2 Research Epistemology

The epistemological perspective is influenced by the research ontology (Bryman and Bell 2007). Numerous researchers have reviewed the philosophical perspective of research design and proposed four types of paradigms: *positivism, interpretivism, realism (post-positivism), and pragmatism* (e.g., (Creswell, 2003); (Denzin & Lincoln, 1998);(Tashakkori & Teddlie, 1998); (Guba & Lincoln, 1994)), see Table 3.2. These paradigms guide the researcher's assumptions in the research process regarding tools, participants, methods, and results rendering (Denzin & Lincoln, 2000).

1) *Positivism* is widely used in the social sciences and is referred to as the *Scientific Method, Empirical Science*, *Post Positivism, and Quantitative Research* (Guba & Lincoln, 2005). The concept of *Positivism* is directly associated with the idea of *objectivism*. Scientists, for example, give their views to evaluate the social world with the help of objectivity in place of subjectivity (Cooper & Schindler, 2006). According to Creswell (1994), positivist research is highly structured, where the variables can be easily identified. Researchers who adopt this paradigm are interested in collecting general information and data from a broad social sample instead of focusing on the details of the research. Their own beliefs do not influence the results of the research study.

2) *Interpretivism* came as an alternative to the dominant paradigm, i.e., *positivistic* (Mustafa, 2011). The paradigm is known as the *humanistic*, *constructivist*, or *naturalistic paradigm* (Mustafa, 2011) and contends that real knowledge can only be obtained by profound interpretation of the subject instead of classical objective analysis and truth. Contrary to positivism, interpretive research variables are largely unknown where little information exists on the topic of study (Creswell, 1994). Here, researchers may use small samples and evaluate them in detail to better understand the views of large groups of people (Kasi, 2009).
3) *Realism (Critical Realism)* mainly concentrates on reality and beliefs that already exist in the environment. Guba (1990) highlights realism as a shared virtue between the critical and the positivistic paradigms (Mustafa, 2011). According to Sekaran and Bougie (2010), this paradigm has two main approaches, direct and critical realism. Direct reality means what an individual feels, sees, and hears, while in critical realism, individuals argue about their experiences for a particular situation. This is associated with the situation of social constructivism, where an individual tries to prove his or her beliefs and values.
4) *Pragmatism* is not affiliated with any system or philosophy (Rahi, 2017), but explains the existence of both the constructivism (subjectivism) and objectivism approaches. The paradigm is pluralistic (Creswell, 2003) and rejects engaging in the '*paradigm war*' between the two opposing viewpoints (positivism and interpretivism) philosophies (Tashakkori & Teddlie, 1998). Pragmatists link the choice of approach directly to the purpose and the nature of the research questions posed (Creswell, 2003). Tashakkori and Teddlie (1998) emphasize that the research problem is most important, and researchers should use all types of approaches to understanding the problem statement. Thus, instead of questioning ontology and epistemology as the first step, pragmatist supporters start with the research question to determine their research framework. Pragmatists also believe that real knowledge can be obtained through a mixed-method approach. This paradigm implies mixing data collection methods and data analysis procedures within the research process (Creswell, 2003). As stated by Johnson and Onwuegbuzie (2004), the paradigm is to find the weaknesses in the study and to strengthen it by using a mixed-method approach. In light of this, Creswell (2003) argues that researchers are free to use both quantitative and qualitative approaches; the essential is to find the best techniques and procedure of research that address the problem statement (Rahi, 2017).

The Research Choice: Pragmatism

Embarking from the theoretical perspective, the nature of the research problem is within the framework of the pragmatism paradigm. *Pragmatism* was determined as the most appropriate paradigm, as the research process required involvement with the sector key stakeholders to address the purpose of the study and provide answers to the research questions. Concerning the research paradigm, pragmatism is generally regarded as the philosophical partner for the mixed methods approach (the research method approach). According to Creswell (2003), the mixed-methods are where the researcher primarily attempts to base knowledge claims on pragmatic grounds (consequence-oriented, problem-centred, and pluralistic). Pragmatist researchers favour working with both quantitative and qualitative data because this enables them to understand social reality better. In this regard, this philosophy aligns comfortably with the investigation about the development of the tourism sector in Oman. The researcher aims to explore and understand stakeholders' views and opinions toward the state of the tourism sector in Oman and identify the challenges in the development and management of the sector.

Table 3.2 Fundamental Beliefs of Research Paradigms in Social Sciences

	Fundamental Beliefs	Research Paradigms			
		Positivism (Naïve realism)	**Post-positivism (Critical Realism)**	**Interpretivism (Constructivism)**	**Pragmatism (Mixed Methods)**
Theoretical Perspectives	**Ontology**: The reality that the researcher investigates	External, objective, and independent of social factors	Objective. Exist independently of human thoughts and beliefs or knowledge of their existence, but is interpreted through social conditioning (critical realist)	Socially constructed, subjective, may change, multiple	External, multiple, view chosen to best achieve an answer to the research question
	Epistemology: The relationship between reality and the researcher	Only observable phenomena can provide credible data, facts. Focus on causality and law-like generalizations, reducing phenomena to the simplest elements	Only observable phenomena can provide credible data, facts. Focus on explaining within a context or contexts	Subjective meanings and social phenomena. Focus upon the details of the situation, the reality behind these details, subjective meanings, and motivating actions	Either or both observable phenomena and subjective meanings can provide acceptable knowledge dependent upon the research question. Focus on practical applied research, integrating different perspectives to help interpret the data
Research Design	**Research Methodology**: The technique used by the researcher to investigate that reality	Quantitative	Quantitative or Qualitative	Qualitative	Quantitative & Qualitative (Mixed or Multi-method)
Research Methods	**Methods**: The methods/ tools used to answer the research questions	Surveys, tests, structured observations	Interviews, texts, surveys, observations	Interviews, open-ended observations, journals, field notes, texts	Interviews, texts, surveys, observations

Source. Adapted from Wahyuni (2012) (based on Saunders et al. (2012), Guba and Lincoln (2005), Hallebone and Priest (2008), and Grix (2004)

3.2.2. Research Strategy

The research strategy or methodology is a guideline to answer the question(s) for undertaking research. Authors such as Yin (1994) have identified five different types of research strategies, as presented in Table 3.3, offering different ways of collecting and analysing empirical evidence: *experiments*, *surveys*, *analysis of archival information*, *histories*, and *case study*.

Before the choice of research method, various questions have to be answered concerning which research strategy to choose. According to Yin (1994), the focus needs to be given to the type of research question, the degree of the researcher's control over actual events, as well as the degree of focus on current events as opposed to previous events. Also, Saunders et al. (2009) express that the choice of these strategies is guided by research questions and objectives. Robson (2002) emphasizes that most researchers use *experiments, surveys, and case studie*s because of the great benefits associated with using them.

Table 3.3 Research Strategies

Research Strategy	**Research Questions**	**Required Control over Behavioural Events**	**Focus on Contemporary Event**
Experiment	How, Why	Yes	Yes
Survey	Who, What, Where, How Much, How Many	No	Yes
Archival Analysis	Who, What, Where, How Much, How Many	No	Yes/No
History	How, Why	No	No
Case Study	How, Why	No	Yes

Source. Adapted from Yin (1994) and Yin (2003)

Figure 3.3 demonstrates the research strategies along with the research methods (approaches) to give a better overview of the selection of the appropriate strategy.

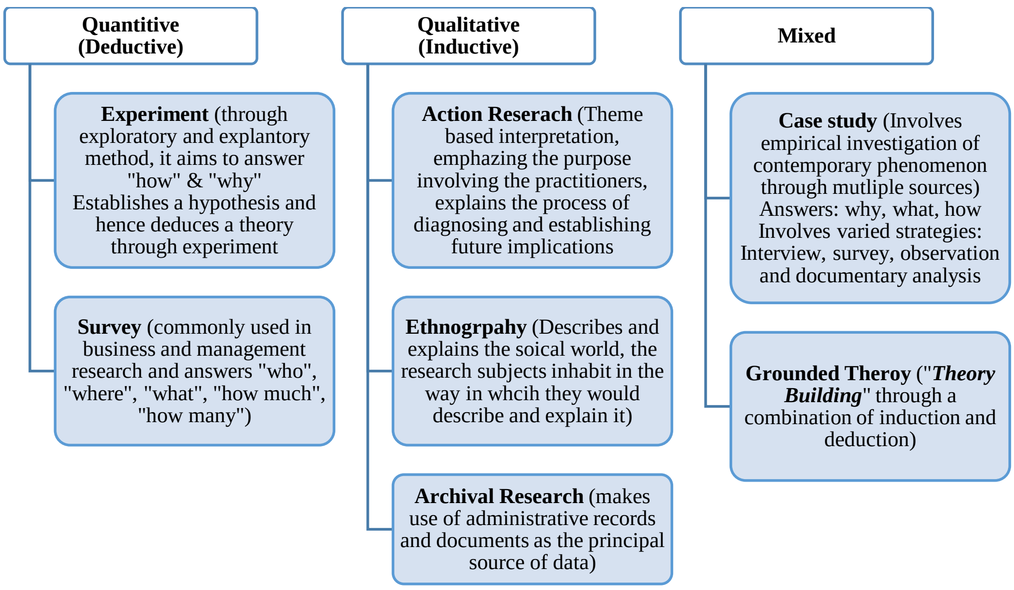

Figure 3.3 Research Strategies and Research Methods
Source. Adapted from Saunders et al. (2009)

The Research Choice: Case Study Strategy

In essence, the case study represents an all-encompassing research strategy that covers design, data collection, and analysis (Beeton, 2005). This research methodology is widely used and has become *"a pervasive methodology in tourism research and study that it appears that its justification is no longer deemed necessary"* (Beeton, 2005, p. 37). For this research, this research strategy is used to streamline the research flow with the research exploratory design and pragmatism philosophy. This strategy is seen as a preliminary research method and that its usefulness is appropriate for the exploratory phase of an investigation (Yin, 2009). Yin (1994) argues that the case study method qualifies as a fundamental research method. He states, *"In general, case studies are the preferred strategy when 'how' or 'why' questions are being posed, when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real-life context"* (Yin, 1994, p. 1). In this regard, the researcher employed this strategy, the tourism sector in Oman, to gain comprehensiveness and profundity for understanding and exploring the influence of the tourism development and destination management association on the Sultanate's economic development. Hudson and Ritchie (2009, p. 222) state that case studies demonstrate a high degree of flexibility and are used extensively in tourism research. This choice of strategy represents a holistic, in-depth empirical analysis that illustrates the complexities of a real-life situation at a particular point in time (Beeton, 2005). This concurs with Yin (2012) that a single case study is the most appropriate method for understanding a new phenomenon from an in-depth perspective (relevant data). Robson (2002) also sees a case study as a research method that facilitates an in-depth investigation of a real-life contemporary phenomenon in its natural context using multiple sources of evidence. Therefore, it can be said that the case study is based on discrete and bounded entities within which the phenomenon and real-life context are inseparable facets of research. Moreover, the advantages of adopting this strategy were based on three principal factors; 1) the focus of the phenomenon in its real-life context, which is the development of the sector in Oman, 2) the clarification of the phenomenon through the establishment of the link between the development of the sector and stakeholders (government, businesses, local community, and visitors), and 3) the strategy is suitable for mixed methods within the research procedure; utilizing various sources of data, such as government and local/international businesses reports, and the primary data; questionnaire for the local community and visitors and an in-depth interview with the officials and tourism business managers in the tourism sector.

Despite its advantages, the case study method has major disadvantages and limitations as an evaluation tool. The lack of generalizability is one of the most common critiques against case studies (Flyvbjerg, 2006). Whether qualitative or quantitative, this strategy typically relates to a single case, such that its results cannot be generalized to other cases. *"It is widely believed that case studies are useful in the study of human affairs because they are down-to-earth and attention-holding but that they are not a suitable basis for generalization"* (Stake, 1978, p. 5). The researcher using the strategy must be content that the research results may only be applicable to a particular context or similar cases. It is always debatable whether a researcher's results are generalizable to broader contexts. Williams (2002) argues that generalization is foreseeable and possible, even in a single case study. The use of generalizability is indeed a critical case that can help explain related phenomena in other contexts, and it is the objective of the case study. In this study, the development of the tourism sector in Oman identifies that the same survey research aspires to be a critical case study in other developing countries that develop and manage the tourism sector. For example, the conceptual framework proposed in this research is likely to be generalized to other destinations that are new to tourism development, particularly other developing country destinations similar to the Sultanate of Oman.

Other limitations that make this strategy undesirable to many researchers are its lack of rigour and the potential bias (a biased interpretation of the data) from the researchers (Flyvbjerg, 2006; Yin, 2009). This means that the researcher does not follow the systematic procedures or allows dubious evidence or biased views to influence the findings and conclusions. In other words, the researcher's independence from the results of the case study is often questioned because, in some types of case studies, the researcher plays an interactive role instead of acting at a distance. However, as long as its advantages and limitations are identified, recognized, and understood, its rich and contemporary nature provides significant insights, contributing to the advancement of knowledge in the field of the study, tourism development.

3.2.2.1 Research Methods

Research methods are classified into three categories for gathering and analysing data and information of a study. These methods are applied, namely, *quantitative*, *qualitative*, or *mixed-methods* approach (Williams, 2007). The nature of methods is different, as well as diverse in their contribution. According to Johnson and Onwuegbuzie (2004) and Tashakkori and Teddlie (1998), the choice of the research method depends on the nature of the study, the research problem, the data needed for solving the problem, and the suitability of the selected method.

The difference between qualitative and quantitative research lies in the different philosophical foundations (Bryman & Bell, 2007). Essentially, the *quantitative* method is suitable for which the researcher primarily uses a positivist approach (numerical data) in claiming and developing knowledge (e.g., cause-effect relationships, hypothesis testing, and use of measurement), employing techniques such as experiments and surveys. Conversely, the *qualitative* method measures the emotions or the other elements (e.g., individual's experiences) that can be measured by textual data such as interviews, observations, and conversational analysis. Furthermore, researchers taking the quantitative approach are mainly concerned with answering questions about *where, how,* and *who*. In contrast, researchers using the qualitative approach are mainly concerned with answering the questions of *why* and *how* (Harrison & Reilly, 2011, p. 7).

The *mixed-method* approach is an extension of rather than a replacement for the quantitative and qualitative approaches (Johnson & Onwuegbuzie, 2004). Here, researchers, to address the research questions, collect not only numerical data, which is customary for quantitative research, but also narrative data, which is a characteristic of qualitative research. Another purpose of the approach is to provide a better understanding of the research problem, which would remain unresolved if only one research method were used (Bryman, 2006; Creswell, 2012, p. 22). Tashakkori and Teddlie (2003) note three areas where a mixed method is superior to a mono-methods approach: 1) the ability to answer research questions that other approaches cannot; answer simultaneously confirmatory and exploratory questions, 2) provide more reliable inferences through depth and breadth in answer to complex social phenomena, 3) provides the opportunity for presenting a greater diversity of divergent views (Armitage, 2007; Mustafa, 2011, p. 28).

Due to the combination between quantitative and qualitative approaches, a number of arguments, according to Bryman (2004), have appeared, including the logic of triangulation, an ability to fill in the gaps left when using one dominant approach, and the use of quantitative research to facilitate qualitative research and vice-versa (Armitage, 2007).

The Research Choice: Mixed-Method and Triangulation Technique

The mixed-methods approach was ensured in this study by using a combination of research methods to provide an in-depth understanding of the development of Oman's tourism industry. The strategy is considered a major strength of the data collection process within case studies (Yin, 1994). Employing mixed methods not only tightened the scope of the research (making it more explicit) but significantly increased the focus and concentration on the study in question and allowed the exploration and use of multiple means of data collection from varying sources. However, the choice of data collection methods is due to the purpose of the study, the resources available, and the skills of the research (Collis & Hussey, 2003).

Within the confines of a case-based strategy, the researcher adopted a triangulation technique as the basis of support for the mixed method results. As viewed as a positive trait, the triangulation approach strengthens the study by combining different methods and sources (e.g., literature) to develop a robust analysis of the data to guarantee significant results and reduce the impact of potential biases, personal and methodological, that can exist in a single study. Yin (2009) states that the use of effective triangulation techniques ought to overcome any discrepancy. According to Sarantakos (1998), there are four reasons for using the triangulation design: 1) to obtain a variety of information on the same issue; 2) to use the strengths of each method to overcome the deficiencies of the other; 3) to achieve a higher degree of validity and reliability, and 4) to overcome the deficiencies of single-method studies.

The literature identifies four types of triangulation (Denzin, 1978; Guion, 2002; Keyton, 2001), which in combination can lead to potentially more meaningful and more generalizable results (Decrop, 1999; Denzin, 1978). Those types of triangulation are defined as follows: 1) *Data source* refers to the use of a mixture of data sources (primary and secondary data) in a particular study; 2) *Investigators* refers to the use of several different researchers to investigate and interpret the same collected data. This type of triangulation method is not used in this study; 3) *Theoretical* involves using multiple perspectives to interpret the same set of data, and 4) *Method* means using different methods (mixed-methods) to study a single problem. For the research to gain a greater understanding of the development of Oman's tourism sector, the data source was used by studying the same phenomenon from four different perspectives, i.e., the local community, government officials, tourism business managers, and visitors. Also, *methodological* triangulation was used by providing three sources of evidence: a survey questionnaire, semi-structured interviews, and document analysis.

3.2.2.2 Data Collection Process and the Sample

The data collection process of the study consists of using primary and secondary data. Figure 3.4 demonstrates the process of using various data sources and methods to understand the study problem environment, test the conceptual framework, and verify the study results. The primary data is collected using direct contact with respondents through interviews and questionnaires, while the secondary data was used to collect and compile relevant data. All generated data information from the primary and secondary levels was recorded and reconciled in a template for analysis, which later led to the results of the study. However, the results of the data analysis may not only answer the research objectives and questions but also identify core themes affecting the development of the tourism sector.

Furthermore, Smith (2010) discusses that all the sources used for case studies need to be used with sensitivity and caution and that it is good to have a certain degree of scepticism, as documents might not necessarily be accurate or could be incomplete. Similarly, the survey answers might be missing. Also, misinterpretations of interviews and the other sources are very likely.

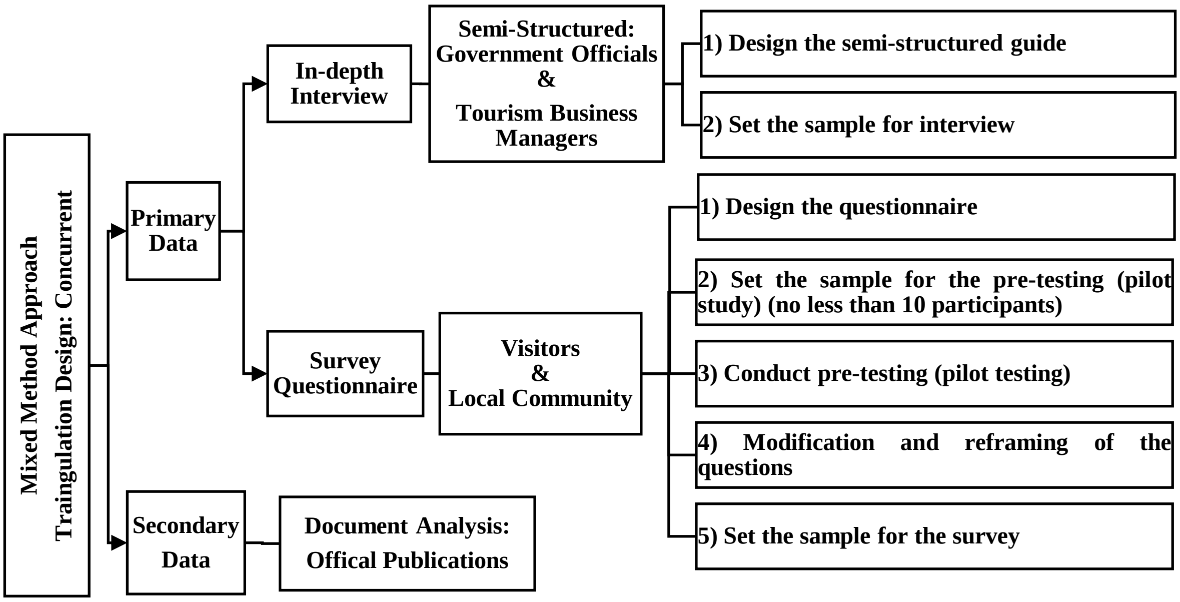

Figure 3.4 Research Data Collection Structure and Techniques (Methods)
Source. Author

The synthesis of quantitative and qualitative data complement each other by collecting data at the same time (concurrent) or one after the other (sequential) (Saunders et al., 2012). *Sequential*, the first phase of data collection can help to inform the second phase, or the second phase can be used to aid in the interpretation of data collected in the first phase. For example, when the intent is to test a prior theory and prove causal relationships, the quantitative data is collected first and then followed at later stages with qualitative data to gain further understanding of the research problem and to help explain the quantitative results. The other data collection technique is *Concurrent (parallel)* that reduces the amount of time required to collect data, and can be more efficient. This method allows researchers to triangulate the results from the separate quantitative and qualitative components of their research, thereby allowing them to ‘‘*confirm, cross-validated, or corroborate findings within a single study*’’ (Creswell, 2003, p. 229). For this research, a *concurrent triangulation* method was applied, in which the quantitative and qualitative data were collected simultaneously in the research procedure, analysed separately, and then comparing or combining the results.

3.2.2.3 Primary Data: Questionnaire and Interview

In obtaining the required information, the main methods used in collecting primary data during fieldwork were a questionnaire survey and semi-structured interviews. According to Saunders et al. (2009), questionnaires are the most commonly adopted method of collecting data in social and management researchers, while interviews are one of the most important sources of case study information (Yin, 2003). Through this methodological triangulation, *questionnaire survey*, and *interview*, the researcher was able to avoid bias from relying on one particular data source and provide the researcher with standardized information from survey respondents and interviewees.

I. Quantitative Method: Survey Questionnaire

A survey questionnaire is a useful option for collecting and recording accurate, reliable, and easy-to-use primary data and information from a representative selection of a target population. This data collection method is classified into *structured (close-ended), unstructured (open-ended),* and *semi-structured*. However, this data collection method, according to Saunders et al. (2009), has been critiqued to have the disadvantages of low response rates, lack of detailed responses on a phenomenon, and limited opportunities for spontaneous responses. For the study, a structured questionnaire was designed as the survey instrument, including all constructs of the proposed model to investigate the questions of the study. Although it is challenging to construct, this survey instrument is based predominantly on closed questions, which produce data that can be analysed quantitatively for patterns and trends. The study questionnaire survey; "*The Satisfaction of the Visitor and Local Community vis-à-vis the Development of Tourism in Oman*," was designed to assess the development of the sector from the perspective of visitors and the local community satisfaction and through focusing on the main themes: destination management organization (DMO), destination planning and policies, destination marketing and promotion, destination products and services, the development of the tourism sector and demographic information of the respondents.

Moreover, according to Saunders et al. (2007), the internal validity and reliability of any given data and the response rate achieved, depend mainly on the design of the questions, the structure of the questionnaire, and the quality of pilot testing. In this regard, the questionnaire questions must be designed distinctly in the way that the researcher is clear about the data required so that respondents understand them in the same way the researcher intended. In turn, the answers provided must be capable of being interpreted by the researcher as intended by the respondents.

Questionnaire Design and Structure:

The researcher used computer software, *Qualtrics, an Online Survey*, to design and distribute the questionnaire electronically (online). The questionnaire was also categorized into 2 parts: the local community and visitors, in order to increase its usability and effectiveness (see *Appendix I: Survey Questionnaires*). Both parts were mainly focused on the participants' opinions and views and their satisfaction with the state of the tourism sector in Oman. For increasing the accuracy of responses, the survey questions were short, direct, and comfortable for discussing to ensure getting the right data and to avoid any harm or offence to the participants. It ensured that the survey questions were kept simple to enhance the response rate. As a general rule, the questionnaire did not take more than 15 minutes to complete.

All questions in both questionnaires were measurable in order to prove their validity and reliability. As illustrated in Table 3.4, various measurements were used by employing different types of questions, a 5-point Likert-type scale (5=strongly agreed or very satisfied; 1=strongly disagreed or very dissatisfied), multiple choices, and close-ended questions. The choice, *do not know* (zero value), also was included in the scale for those who might not have any opinion about the destination. The rationale for coding the order was to balance the agreement and disagreement scales, and the more positive the response, the larger the number, which makes interpretation of outcomes easier. The use of a Likert Scale was the most appropriate in this research because it is simple to administer (Zikmund, 2000), has a high degree of validity and reliability, provides single scores from a set of items, allows ranking of the respondents, is relatively easy to construct (Sarantakos, 1998), and is an interval scale (Aaker, Kumar, & Day, 2004).

Table 3.4 Measurements and Scales of Items

	Measured Variable		Example Statement	Measured Scale
Part One: The Local Community (Omanis and Residents/Ex-pats)				
1)	Role of the Destination Management Organization (DMO)	-	Tourism projects and activities are based on and related to the community's attitude and needs.	(1) Strongly disagree (5) Strongly agree
2)	Tourism Destination Planning and Policies	-	The national tourism strategy has been reflected clearly through the projects and investments in the tourism sector.	(1) Strongly disagree (5) Strongly agree
3)	Destination marketing and Promotion	-	Marketing promotion schemes do not reflect the destination activities and attractions	(1) Strongly disagree (5) Strongly agree
4)	Tourist Products and Services	-	Oman, as a tourist destination, offers a diversity of attractions that are appealing to the local community.	(1) Strongly disagree (5) Strongly agree
5)	Development of Destination Products and Services	-	Developing visitor-supporting services (e.g., hotels, resorts, restaurants, shopping malls, others.)	(1) Not a priority (5) Essential
6)	Development of the Tourism Sector	-	The development of the tourism sector has encouraged many small, medium enterprises (SMEs) to establish projects in the sector.	(1) Strongly disagree (5) Strongly agree
7)	Local Community Opinion	-	To what extent are you satisfied with the level of tourism development in Oman?	☐ Very Satisfied ☐ Very Dissatisfied
Part Two: Visitors (International Tourists and Business Travellers)				
	Measured Variable		**Example Statement**	**Measured Scale**
1)	Destination marketing and Promotion	-	Oman is a well-known tourism destination brand, which reflects its culture, heritage, and natural resources through its tourism products	(1) Strongly disagree (5) Strongly agree

			and services (hotels, restaurants, shopping malls, others.).	
2)	Tourist Products and Services	-	The tourist's products and services (hotels, restaurants, shopping malls, others.) are available and accessible.	(1) Strongly disagree (5) Strongly agree
3)	Development of Destination Products and Services	-	Developing access procedures (e.g., visas), safety, and security programs (e.g., preventing robbery, bribes, others.).	(1) Not a priority (5) Essential
4)	Visitor's Opinion	-	To what extent are you satisfied with the level of Tourism development in Oman?	☐ Very Satisfied ☐ Very Dissatisfied

Source. Author

Although the questionnaire was written in English, the necessity was to target as many participants in the study, therefore the questionnaire was also translated into two other languages, Arabic and German. This procedure went through many stages. Initially, it was translated by Arabic and German professionals at the University of Exeter (e.g., Language Centre), followed by separate consultation reviews from two specialists in Arabic/English and German/English translation. English, Arabic, and German language professors and practitioners in Oman and the UK reviewed the content of copies to ensure the correctness of the translation. It was noted that the reason to distribute the survey in the German language was that Germans constitute the largest group of international visitors to Oman among the European visitors, according to the latest NCSI (National Centre for Statistics and Information) statistics.

The researcher administered questionnaires and distributed questionnaires electronically (online) and manually (hardcopy) in some cases. The rationale of applying an online survey in the study was due to the research sample size and how widely it could be distributed around the Sultanate and abroad. Also, the context and timeframe within the research allowed for the use of emails and social media platforms. Internet (e-mail and web-based) and mobile surveys are useful for gathering information quickly and relatively inexpensively from geographically dispersed participants. As Hewson, Yule, Laurent, and Vogel (2003, pp. 43-44) state, *"the advantage of the internet-mediated questionnaire is that it significantly increases the time and cost efficiency, access to vast and variety of group of possible participants; and appealing or attractive."* Email questionnaires, for example, allowed the respondents to fill in the survey at their convenience, and the response rates from email surveys were high and the best vehicles for asking detailed written responses. Also, employing social media platforms has provided the researcher with the opportunity to familiarise with the broader study area and to establish contact with participants; visitors and the local community. Although there are limitations associated with using the Internet for the participants, the researcher did not experience any problem in conducting the online survey. On the other hand, the survey would be distributed using a more traditional (by hand) to distribute a hardcopy of the survey to the participants in case of not reaching or neglecting. However, the potential drawback of using a web-based questionnaire was that the respondents might misunderstand the questions and be unable to clarify them, or they might skip several questions and only answer a few of them. Keeping this in mind, all the research was conducted with a strong emphasis on the clear instruction that all questions should be answered.

Pilot Survey (Testing and Revision):

In order to ensure that the final draft of the questionnaire was as evident as possible, it was essential to undertake a pilot test (study). A pilot study is imperative to check the reliability of the data to be collected as well as the validity of the questions. Saunders et al. (2012, p. 451) state that to assess the validity, the questionnaire must undergo "pilot testing" this way, it examines if the questionnaire is understandable to the prospective participants. Moreover, according to Ticehurst and Veal (2000), conducting a pilot study is crucial to achieving several objectives: testing questionnaire, wording, sequencing and layout, gaining familiarity with respondents, estimating the response rate, and estimating the questionnaire completion time.

For the study, the questionnaire questions were sent out to six experts and colleagues (in the United Kingdom (Exeter) and the Sultanate of Oman (Muscat and Salalah)) with many years of experience in research and teaching in social sciences, including business and tourism. They were called upon to critically examine the questions from the perspectives of understandability and simplicity, catchability, and representativeness/reflection. In addition to the experts, the pilot survey required more viewpoints from some managers of tourism businesses, government officials, a few on-the-spot tourists, and some community members before the start of the fieldwork. These exercises were beneficial because they generated some feedback on the length of the questionnaire, the wording, and the syntax of some questions. Comments made by the experts, as well as by the respondents of the pilot survey, enabled the researcher to restructure, reformulate and simplify specific questions as well as provide comments to some sections in the final draft of the questionnaire (explicitly prepared for the local community members and visitors). This made it possible for the 'average' local community members and visitors to be able to comprehend and answer all the questions without any confusion as well as strengthen the connection between the questions and the research aims.

Research Survey Sampling:

This research is circumscribed within the characteristics of '*purposive or non-probability sampling,*' utilizing a convenience sample at the time of the survey. In light of the convenience sample, the researcher selected the *snowball sampling method* in obtaining the appropriate sample of the population, which was not readily accessible to the researcher through other methods. This sampling technique is economical and reliable in that one participant leads to another, who, in turn, leads to another, and so forth. More, as with random sampling, the snowballing method is not as uncontrolled as its name implied. In this regard, the researcher was deeply involved in developing and managing the origination and progress of the sample and sought to ensure at all times that the chain of referrals remains within limitations that were relevant to the study. One of the limitations of this sampling method was that respondents often suggested others who share similar characteristics or the same outlook. Therefore, the researcher needed to ensure that the initial set of respondents was sufficiently varied so that the sample was not skewed excessively in any one particular direction. To avoid such matters, the research conducted focused in particular on the number of respondents and any similarities in their answers.

After selecting the sampling method, 'snowballing', and before collecting data, an important question was highlighted: *"How many visitors and local community members should the research sample consist of?* The researcher had to take a convenience sample for the study population to raise the level of reliability and validity of the research. Yin (2003) emphasizes that there is no limited number of respondents, but an adequate number to achieve accurate and theatrical replication. However, the sample size should be determined by the level of certainty that the characteristics of the data collected represent the population, the margin of error that can be tolerated, and the type of analyses to be performed. As a result, a large sample population was considered to be helpful in this research for generating better results. The sampling error was expected to decrease as the size of the sample increases. Therefore, to guard against error, and according to Saunders et al. (2007), the minimum sample size of 386 is considered to be representative and sufficient at a 95% confidence level for a population range from one million to ten million.

The target population for the study was the local community (Omani and residents/ex-pats) and visitors (international tourists and business travellers). The research survey population consisted of approximately 4m visitors and members of the local community in Oman. According to the NCSI annual statistical books and reports, more than 3m people visited Oman every year, which was estimated at around 2m by focusing on adults (Omanis and residents). Accordingly, it was decided to collect a sample of no less than 400 of the local community members and a sample of no less than 200 visitors, the margin of error (4-5%), and confidence level (95%). However, some professional researchers typically would set a sample size level of about 500 to estimate a single population parameter optimally (TheResearchAdvisors, 2006). Moreover, the researcher was expecting the number of questionnaires would go further to exceed the 600 questionnaires to get more of the viewpoints of both visitors and the local community.

II. Qualitative Method: Face-to-Face Interview

By using several alternative methods, data was also collected through conducting interviews with representatives in the tourism sector to uncover new qualitative information in addition to quantifiable results. The use of interviews has thus the added benefit of providing high levels of personal insight that enables a researcher to gain more detailed and thorough information on the study. According to Dunn (2005, p. 80), interviews are an excellent method of gaining access to information and collecting a diversity of opinions and experiences. Here, the researcher gave two purposes for using the interview method in this study. Firstly, for further follow-up and verification of visitors' and local community responses in the questionnaire from the perspective of government officials and tourism business managers, and secondly, for an in-depth investigation of the issues identified from the secondary data. In that way, the researcher wanted to identify and explore the issues and strategic challenges facing the development of the tourism sector in developing countries, specifically Oman.

Interviews are formed by unstructured, structured, and semi-structured questions (Saunders et al., 2007; Yin, 1994, 2003), and vary according to their structure, how deep they go, and the degree to which they are standardized across different respondents and situation. The more structured an interview is, the less likely it is for a participant to feel at ease and reveal important and relevant issues. However, the less structured it is, the more difficult it is to analyse afterward. Robson (1999) argues that the lower the degree of structure in the interview, the more complex the performance required from the interviewer. The interview structure also needs to be kept flexible so that crucial issues not identified before the interview were allowed to emerge throughout the discussion. Hence, for this research, the researcher adopted *semi-structured interviews*, an appropriate technique to gather in-depth information about the study (see *Appendix II: Interview Guide*). This technique provides reliable, comparable qualitative data and allows informants the freedom to express their views on their terms.

Yin (1994) argues that semi-structured interviews are a suitable choice of research method when researchers have only a small control over the environment; when the phenomena under investigation are contemporary; and when the context of the research is essential. The approach is also less time-consuming, and their set of general themes allows questions to be added or changed within the interview. Also, it offers openness to change the sequence and form questions in response to a specific answer given by a participant.

Semi-structured Interview Structure:

The semi-structured interview questions were separated into two parts: the public, government entities, and the private sector tourism businesses (see *Table 3.5*). Each interview was designed around key themes to compose sections with a relevant set of questions (see *Appendix II: Interview Guide*). Topics of discussion included, for example, were questions about Oman as a tourism destination (i.e., What are the main achievements that the Omani government has reached in the tourism sector), questions about Oman tourism development (i.e., to what extent do you think tourism resources (natural and human-made) have been appropriately exploited to support Oman's economy), tourism impacts (i.e., what are the most negative tourism impacts on society, the environment, and the economy in Oman) and private sector role (i.e., to what extent has the private sector been involved in the development of the tourism sector).

Table 3.5 Interview Themes (the Public and Private Sectors)

Public Sector: Government Entities	Private Sector: Tourism Businesses
1) Theme: Oman as a Tourism Destination	1) Theme: Private Sector Role
2) Theme: The Government as a Destination Management Organization (DMO)	2) Theme: Oman Tourism Planning and Policies: the National Tourism Strategy (Vision 2040)
3) Theme: Oman Tourism Planning and Policies: *The National Tourism Strategy (Vision 2040)*	3) Theme: Oman Tourism Marketing
4) Theme: Oman Tourism Marketing:	4) Theme: Oman Tourism Development:
5) Theme: Oman Tourism Development	5) Theme: Tourism Impacts (Social, Environment (Ecology), and Economic Environments)
6) Theme: Tourism Impacts: Social, Environment (Ecology), and Economic Environments	

Source. Author

The questions were as flexible as possible to encourage the informants to communicate their knowledge, beliefs, and feelings without being constrained. Follow-up questions were also used to build rapport, allowing informants to expand their answers and clarify issues. Moreover, the interview questions were developed over time and reviewed and pre-tested by academic colleagues and officials in Oman, which led to some changes, especially with regard to the structure and language components.

Moreover, during each interview, the researcher had the chance to amend the questions according to the interviewees' practices, which was useful in the post interviews that the researcher conducted. Thus, by adopting this method, the researcher and the interviewees would become more flexible, allowing them to identify the important themes or issues. The researcher was also more confident to seek more explanations and clarify meanings about some of the interviewees' practices and behaviours. Nevertheless, this technique might have some limitations because flexibility could affect how different respondents answer the same questions, thus reducing comparability (Cohen, Manion, & Morrison, 2000). Such flexibility may cause a problem if participants deviate from the topic being researched.

Research Interview Sampling

Since the research aimed to investigate the issues affecting the development and management of Oman's tourism sector, a random sampling of interviewees was thus not possible. Instead, the quality of data generated, and the participant’s depth of knowledge were the crucial factors taken into consideration when selecting the interviewees. In this regard, this research adopted the *purposive sampling* method. Maxwell (1996) states that the researchers could choose participants (in this case, interviewees) based on their features that fit the study purposes in purposive sampling (Özdemir, 2010). According to Saunders et al. (2009), the purposive sampling approach is where the researcher previously knew something about specific people, individuals or groups, and intentionally chose particular ones because they were seen as those that were liable to generate the most valuable data. Patton (1999) asserts that there are no specific rules for deciding the sample size in qualitative research, even though the sample sizes should be large enough to obtain feedback for most or all perceptions. Time and effort spent by the researcher to understand interviewees’ experiences should play an essential role in ensuring the reliability and validity of the primary data and samples. Therefore, choosing an adequate sample size was subject to different factors, including time, facility, and effort limitations. A researcher may look at a narrow range of experiences for a more significant number of people or a broader range of experiences for a limited number of people to avoid misrepresentation of the study sample and strengthen the understanding of the interviewees' data generated (Patton, 2014).

In this sampling approach, participants interviewed were selected based on their positions and functions within Oman’s tourism in both the government and tourism businesses, i.e., their relevance to the theoretical focus of the research. This also helped to maximize variation in the sample and recruit respondents from each sector due to time and cost constraints. As a result, the researcher limited the number of interviewees to the Ministry of Tourism officials with managerial positions such as department and unit directors, with focus also being placed on CEOs and general managers in the tourism sector. These interviewees were selected with a specific reason in mind, which reflected the qualities of the individuals selected and their significance to the area of the exploration. Kuzel (1992) calls for a focus on information richness rather than sample size in qualitative research (Coban & Yildiz, 2019, p. 121). The target sample was to have at least 8 interviewees, 4 interviewees from both the public and private sectors. In any case, a total number of 8 up to 12 key informant interviewees should be considered sufficient for this study. However, there was an increase in the interviewees to reach

12 interviewees, see Table 3.6. This was based on the availability of the interviewees and the researcher's time and efforts. Thus, to avoid geographical differences, the researcher chose participants in two different regions of the Sultanate: Muscat, the capital, and Salalah in the Dhofar Governorate. Also, to cover as many views in the tourism sector, the interview questions were translated into Arabic for some of the interviewees, some of the government officials, and private enterprises, who do not speak English (see *Appendix II: Interview Guide*).

Table 3.6 Sample of the Public and Private Interviewees

Public Sector *(Government Entities)*	**Position**	**Location**	**Duration**
Ministry of Tourism	1) Assistant Director of Tourism Products and Sites Development 2) Director of Awareness Tourism Department 3) Director of Tourism Promotion and Marketing Department 4) Head of Tourism Development Department 5) Marketing Consultant	Muscat and Salalah	One hour (each)
Private Sector *(Tourism Businesses)*	**Position**	**Location**	**Duration**
Golden Tourism Oman	1) General Manager and the Owner	Muscat	One hour
Unique Diamond Tour	2) General Manager and the Owner	Muscat	One hour
Elite Travel and Tourism	3) Managing Director	Muscat	One hour
Trekking and Adventure Tourism	4) General Manager	Muscat	One hour
Old Muscat Tourism	5) Managing Director	Muscat	One hour
Godoba.com	6) General Manager	Muscat	One hour
Dhofar Tourism Company (DTC)	7) General Manager	Salalah	One hour

Source. Author

3.2.2.4 Secondary Data: Documents Analysis

Secondary data is the use of existing data collected for purposes other than the researcher (Saunders et al., 2007; Sekaran, 2003). These kinds of data sources range from books and journals, broad-case media including the Internet, official annual reports and statistics, and other sources. Fortunately, this data requires less effort and money to obtain (Saunders et al., 2007). For this study, the document analysis method was used, which consisted of the accumulation of information (written and recorded verbal communication) about the research case study. This involved an in-depth content analysis of documents relating to tourism from the Oman government, such as the MOT and NCSI reports, recognizable tourism organizations such as the UNWTO and WTTC report, and national and international journals. This enabled the researcher to provide insights and guidelines to possible answers to the research questions. However, the exclusive use of secondary data might not be suitable for all types of research, including this research, where published and unpublished information is challenging to obtain. This is because there was little published information dealing with Oman’s tourism sector both within and outside of Oman, coupled with highly restricted access to some data and information from the Omani government.

Regarding secondary data selection criteria, the literature review, for instance, includes the title of the literature or articles that must contain wordings such as destination management, destination marketing, and tourism development. It is important to note that the analysis should be done before the fieldwork by trying to separate the information gathered to date of any circumstances, which might arise with new insight.

Moreover, the researcher transcribed the session between Majlis Al-Shura (Omani Parliament) members and the Minister of Tourism on February 27 and 28, 2019. The session is available on YouTube (https://www.youtube.com/watch?v=Z_16CZT2nOs&t=472s) and open to the public. The Tourism Minister, H.E. Ahmed Nasser Al-Mahrazi, delivered the ministry's statement on the status of the tourism sector and investment, including 5 main themes covering the status of the tourism sector, legislation governing the sector, tourism marketing and promotion, tourism investment, and human resources in the tourism sector (TimesofOman, 2019b). Although the number of members in the parliament exceeds 60 members, the researcher just focused on members who gave critical questions to the Minister, as shown in Table 3.7.

Table 3.7 Focused Members of Majlis Al-Shura (Omani Parliament)

Name Members of Parliament (Majlis Al-Shura)	State	Governate /Province
1. *Abdullah Al-Junaibi*	Manah	Al-Dahkliah
2. *Abdulsalam Al Kamali*	Khasab	Musandam
3. *Ahmed Al Hadabi*	Bidbid	Al-Dahkliah
4. *Ahmed Al-Hadri*	Salalah	Dhofar
5. *Dr. Abdullah Al-Amri*	Sadah	Dhofar
6. *Dr. Hamodah Al-Harsosi*	Hima	Al-Wusta
7. *Dr. Hamoud Al-Yahyai*	Dhank	Al-Dhahirah
8. *Dr. Salah Masan*	Thumrait	Dhofar
9. *Hilal Al-Sadrani*	Sohar	Al-Batinah North
10. *Hilal Al-Sarmi*	Al-Seeb	Muscat
11. *Hilal Al-Yahyahi*	Bahla	Al-Dahkliah
12. *Mohammed Al Balushi*	Al-Amrat	Muscat
13. *Mohammed Al Busaidi*	Bushar	Muscat
14. *Mohammed Al-Badi*	Saham	Al-Batinah North
15. *Mohammed Al-Ghasani*	Salalah	Dhofar
16. *Mohammed Al-Kindi*	Nakhal	Al-Batinah South
17. *Sultan Al-Abri*	Abri	Al-Dhahirah
18. *Tawfiq Al-Lawati*	Muttrah	Muscat
19. *Yousef Al-Balushi*	Shinas	Al-Batinah North

Source. Author

3.3. VALIDITY AND RELIABILITY

Validity and reliability are the key challenges affecting the credibility and quality of research. Thus, developing a consistent and complementary methodological framework reflecting the study's aim and research questions that support the validity and reliability of the study.

Saunders and Tosey (2015, p. 223) state that a *valid* questionnaire collects data that mostly measures the concepts of interest, while *reliable* data are collected continuously.

On the one hand, the validity is about whether the applied instruments measure what is intended to be measured (Clark, Riley, Wilkie, & Wood, 1998, p. 129). Oliver (2010) considers the validity to be a compulsory requirement for all types of studies. However, if nearly impossible, it is rare that an instrument is 100% valid, so validity is measured in degrees. Additionally, measuring validity involves many forms, such as *construct*, *internal*, and *external*, as shown in Table 3.8. *Construct* validity indicates whether the researcher's judgment and evidence are sound and allow him or her to obtain valid conclusions. *Internal* validity is whether the conclusions made about causes and effects are reasonable and make sense, hence if they are functionally related. *External* validity, moreover, implies whether the results lead to deeper insights or support other concepts and models related to the topic of the study. More *Content* validity is about the content of questions that is logical to the respondents. These concepts (forms) are commonly used to judge the quality of any empirical social research, including this study, during the empirical data collection, where the researcher aimed at assuring high validity.

On the other hand, reliability is the degree to which the researcher, or any other person, would come to the same results if the same study was to be carried out again (Smith, 2010, pp. 197-198). The approach concerns the extent to which an experiment, test, or any measuring procedure yields the same results on repeated trials (Carmines & Zeller, 1979). King, Keohane, and Verba (1994) state that reliability is ensured when applying the same procedure, in the same way, and will always produce the same measure. The researcher aimed to conduct a reliable study; however, it should not be impossible to determine its real reliability unless the same investigations would be carried out again under the same conditions and with the same subjects. However, there is a significant issue that undermines reliability, which is the lack of objectivity in obtaining and analysing information (Robson, 1999). According to Wilson (2010), reliability issues are most of the time closely associated with subjectivity. Once a researcher adopts a subjective approach towards the study, then the level of reliability of the research is going to be compromised. Saunders et al. (2012, p. 430) outlined the three ways to evaluate reliability, such as *"test re-test; internal consistency and alternative form."* For instance, internal consistency involves correlating the responses to each question in the questionnaire with those to other questions in the questionnaire (Saunders, Lewis, & Thornhill, 2003).

Table 3.8 Types of Validity and Reliability

Type	Definition	Action Strategies Followed
Content or Face Validity	The degree to which the content of an indicator reflects the intended concept.	- Literature review - Feedback from experts - Pre-testing of the questionnaire - Confirmatory factor analysis
Internal Validity	The degree to which relationships between variables have been correctly interpreted.	- Data analysis
Construct Validity	The degree to which a construct achieves empirical and theoretical meaning.	- Literature review - Pre-testing of the questionnaire - Data analysis
External Validity	The degree of generalization of research findings.	- Data collection - Data analysis
Reliability	A measure is reliable to the extent that independent but comparable measures of the same trait or construct agree.	- A clear statement and multiple indictors in the questionnaire - Pre-testing of the questionnaire - Factor analysis

Source. Adapted from Al-Masroori (2006, p. 212)

Reliability and appropriate validity tests have been carried out in the analytical process. This study managed validity and reliability by investigating whether data gathered by the questionnaire and semi-structured interviews were appropriate for answering the research questions. The data collected and used in this research comes solely from conducting interviews with government officials and business managers as well as the respondents, the local community and visitors by distributing an online questionnaire. Furthermore, all secondary data from past studies and other sources of secondary data presented and used came only from reliable sources. The data was enough to conduct the research and build the case study (development of the tourism sector in Oman) after removing the unwanted information from the collected data. Also, to guarantee whether the data could be integrated into the research, the researcher incorporated the data collected into the current study without the risk of bias.

As mixed data (qualitative and quantitative) were the central point of this study, the questions were carefully designed, worded, and formatted in order to avoid measurement error and chances of falsifications in the answers. Face-to-face interviews were conducted to obtain the qualitative data that provide more accurate screening and capture verbal cues for each interviewee. For the survey, the respondents were given adequate time and space to record their responses, and the procedures and purpose of the fieldwork were explained. Furthermore, in ensuring the research was carried out with adherence to the ethical principle, it was clearly stated in the questionnaire that data provided would be treated anonymously.

Regarding validity, the questionnaire, interview questions, and guidelines provided adequate coverage of the aim and research objectives that were carefully designed, assuring that all information would be clearly understood by the participants, as well as the clarities of content and word structure, in the way the researcher intended. Therefore, the content validity is the extension to which the construction of the interview questions and statements in the questionnaire were essential to ensure the participants understand what the questions were trying to achieve, to what extent do they reflect the actual attitudes, and to avoid any biases.

The researcher could be more confident with a result if different methods lead to the same result. Therefore, to ensure the reliability of the gathered data and to minimize subjectivity, the questionnaire and interview questions were designed to support the research objectives. Each question was explained to each respondent through written guidelines in order to make sure that all questions were answered in the same way to ensure the reliability of the current research.

In order to ensure the reliability and validity of the interviews, the interviewees were asked the same questions or issues for their judgments about what were and were not representative data or views. Also, all interviews were tape-recorded to minimize the possibility of misinterpreted answers during transcription. During the interviews, the purpose of the study was explained to ensure that participants understood the motivation for conducting this research. Also, the validity during interviews could be lower because interview patterns were translated into Arabic and accordingly again retranslated into English during transcription. This process could result in misinterpretations and mistranslations. Thus, to avoid this, the interview patterns and transcription of results were examined and edited to make the primary research more valid.

Moreover, to ensure the reliability of the information through the translation process, detailed repetitive explanations of questions and answers between the interviewer and those being interviewed were given (Timothy, 1998). Questioning proceeded only once both parties fully understood the previous questions and answers. Interviews included a consistent set of open-ended questions that were designed to address issues of tourism planning and policies, destination management, and marketing and tourism impacts. For example, the government officials were asked about the Ministry's strategy to overcome the obstacles (threats) that hinder the sector investments, such as a high government budget deficit resulting from the slump of oil prices. The government officials and tourism business managers were also questioned about the tourism sector’s contribution to GDP that has been less than 3% for more than a decade, despite vast investments and spending.

Internal Consistency Cronbach's Alpha:

Based on the theoretical review and empirical research, all measurement scales for each construct of the theoretical model were newly developed by the researcher. An examination of the reliability and validity of the measurement scales revealed that the measurement scale for each construct was reliable and valid in terms of the internal consistency and accuracy of what they intend to measure (Yoon, 2002). The construct validity of the questionnaire was examined using Cronbach's alpha to measure the internal reliability to connect the multiple-item scales (Bryman & Cramer, 2001, p. 78). The reliability of the scale was tested by Cronbach's alpha, which is the most common measure of internal consistency of the data, and especially with the Likert scale questions (Cronbach, 2004). As recommended by Nunnally (1978), the acceptable value of coefficient alpha is 0.70 or more. However, under some circumstances, a low alpha could also be considered acceptable due to the scale length (Dall'Oglio et al., 2010; Yang & Green, 2011). George and Mallery's scale for guidance shows that with a score of (> 0.9) indicating an excellent level of consistency, a score of (> 0.8) a good level, (> 0.7), an acceptable level, (> 0.6) a questionable level, and (> 0.5) a poor level (George & Mallery, 2003, p. 231). The developed measurement scale for local community satisfaction, which was composed of 38 statements in sections (2, 3, 4, 5, and 6), generated a Cronbach's coefficient's alpha of 0.83, whereas, for the level of consistency among the visitor's 20 statements in sections (3, 4, and 5) was 0.87 exceeded the minimum, acceptable, standard 0.60. These results indicate that these measurement scales were reliable in assessing stakeholders' satisfaction towards the development of the tourism sector.

3.4. ANALYSIS

After identifying the research paradigm and methodology and collecting sufficient data, the next step is data analysis and interpretation. The data analysis process consists of examining, categorizing, tabulating, or otherwise recombining the evidence to address the initial propositions of a study (Yin, 1994). Meaning that this process involves examining and moulding collected data to discover relevant information and to answer research questions, and as well, it serves as a reference for future data collection and other research activities. However, Yin (2009) warns that a significant practical difficulty of analysis of case study evidence is dealing with the amount and variety of data collected.

In this study, the assessment of data collected was necessary to ascertain whether the data were sufficient and appropriate for answering the research questions and achieve the research objectives. The process of analysing the data was done in 2 stages after removing the unwanted information from the collected data. The first stage started with the analysis of the survey questionnaire: the local Omani community and visitor satisfaction questionnaires. The second stage was data analysis of the interviews, the transcription of the data from the interviewees' profiles.

3.4.1. Data Analysis of the Survey

The study survey questionnaires completed by the local community and visitors were conducted online in the period from February to May 2019. Later, the data obtained online, via Qualtrics, was analysed, and the results were acquired with the use of the statistical software program SPSS Statistics (V.25). Since the Qualtrics and SPSS applications may be quite complicated, training was required by the researcher.

From the local community, more than 900 Omani citizens and residents participated. However, the sample size obtained was 790 respondents who completed the survey, while the remaining were discarded because some respondents could not complete all the answers, see Table 3.9. The number of visitors to Oman who participated in the surveys was more than 200 tourists and business travellers, and the sample size obtained was 210 respondents who completed the survey. Notwithstanding, the percentage of missing data was small and varied from one variable to another in both questionnaires. Concerning the acceptable response rate for results to be valid and generalizable, it has been suggested that a total response rate of at least 70% for all segments means that the results will not be significantly affected by a non-response bias (Neuman, 2003). Based on this, the questionnaires showed a total response rate of above 80%.

Table 3.9 Survey Response Rates

Segment	Surveys Completed (n)	Missing	Responses (n)	%
Local Community (Omanis/Resident)	903	113	790	79
Visitors (Tourists and Business Travellers)	225	15	210	21
Total	1128	128	1000	100

Source. Filed Survey

There are numerous ways of analysing the data collected. The type of statistical analysis chosen was based on its appropriateness for the research question being investigated and the nature of the data being analysed. Often simple descriptive analysis of aggregated data (e.g., the mean rating and standard deviation of a particular variable over a specific segment) will provide useful and relevant information. In addition, the multivariate analyses, including factor analysis, provide a more sophisticated analysis.

For the study to examine the characteristics of the local Omani community and visitors and their satisfaction towards the development of the tourism sector, a combination of statistical methods was selected. First, descriptive analyses (bivariate and univariate) were performed to identify the characteristics of sample profiles. Second, statistical comparisons were made using factor analysis to identify the satisfaction factors in the study. Using several different techniques adds to the validity if there is a convergence between the results achieved using different analyses.

3.4.1.1 Descriptive Analysis: Bivariate and Univariate Variables

Statistical data analysis methods: bivariate and univariate were used to analyse data obtained. First, bivariate analysis was used to explore the difference and relationships about populations based on the data drawn from them or to seek the existence between groups within the independent variables. In this study, an example is the demographic characteristics of tourism stakeholders that were measured by age, gender, employment, and others. The socio-demographic factors were used only to ensure that the sample distribution across different categories would generate maximum generalization, but not to control and explain the study outcomes.

The second analysis method is univariate that is used to examine “one variable at a time” other than the whole variable and describe it (Kent, 2015, p. 80). The method includes exploring data using frequency tables to emphasize the numbers and percentage of respondent responses from the survey-based questionnaire. Kent (2015, p. 254) notes the advantages of using univariate analysis based on the variable are, firstly to able to show the size and shape of occurrence of study, and reveals the pattern and trends in a way the variable relates to one another, even with a large dataset of numerous variables; secondly, the ability to compare quantitative cases precisely; third, it precisely measures the tendency of changes either category or metric value on one variable; fourth, establishes the relative importance on independent variables; and finally, is useful for exploration and verification.

Data obtained from the survey questionnaire were analysed using descriptive statistics in the form of frequencies, percentages, and tables. According to Borrego, Douglas, and Amelink (2009, p. 54), descriptive statistics are particularly favoured in topics that have not been extensively researched beforehand. The study adopts the statistics: mean score rating (M) and standard deviation (SD) (68-95-99.7% rule) to measure the range of the highest and lowest value as well as the spread or dispersion of variables. They were also used to assess the level of satisfaction of the local community and visitors regarding the variables of the destination (the role of DMO, destination planning and policies, destination marketing and promotion, tourism products and services, development of destination products and services, and the state of the development of the sector). The analysis of the mean score aimed to identify the outstanding items that could contribute to understanding the overall satisfaction of both the local community and visitors. Also, a high score means that respondents were more satisfied or not by the item. Concerning the validity and the significance of the score, all statements were significant.

The Chi-square Test of Independence

The use of non-parametric analysis, such as Chi-square, is significant to create meaningful results for data that did not meet the assumption requirement to run the parametric analysis. The Chi-square statistic is a non-parametric (distribution-free) tool designed to analyze group differences when the dependent variable is measured at a nominal level (McHugh, 2013). The non-parametric statistical analysis employed for this study is divided into three different functions. Firstly, to determine the relationships between the demographic characteristics and satisfaction factors affecting the local community and visitors. Secondly, to achieve the relations between two variables, the Chi-square test was utilised due to its capabilities to evaluate Tests of Independence when using a cross-tabulation or crosstab. A significance level (denoted as α or alpha) of 0.05 indicates a 5% risk of concluding that an association between the variables exists when there is no actual association. Third, utilising the Chi-square test allows the researcher to assess whether an association exists between the two variables if they were truly independent of each other.

3.4.1.2 Multivariate Analysis: Factor Analysis

Factor analysis is a multivariate technique for analysing data that is used to determine the underlying structure in a data matrix (Hair, Bush, & Ortinau, 2002). According to Yong and Pearce (2013), the broad purpose of factor analysis is to summarize data so that relationships and patterns can be easily interpreted and understood. This statistical technique is used for grouping different statements or items in factors for their better and more effective manipulation, based on respondents' responses. Additionally, factor analysis can be either exploratory (EFA) in nature, where data are searched for the underlying structure and to explore the interrelationships among a set of variables, or confirmatory (CFA), where the researcher seeks to confirm hypotheses or theories concerning the structure of the underlying set of variables (Yong & Pearce, 2013).

In this study, the exploratory factor analysis (EFA) was employed for addressing the major factors that influence the level of satisfaction for the local community and visitors towards the development of the tourism sector. Besides, the factors generated from this technique would affect destination development process strategies and destination choice decisions. They also influence the visitor decision-making process. In this regard, the intention was to group 58 statements in the questionnaires used (38 in the local community, and 20 statements in visitors') into a number of related factors (variables) to best represent the interrelationships among the variables. These statements could be found in both the local community sections: (2, 3, 4, 5, 6, and 7) and visitors (3, 4, and 5) (see *Appendix I: Survey Questionnaires*) including the role of the DMO, tourism planning and policies, destination marketing and promotion, tourism products and services, and development of destination production and services. This process applied the Principal Components Analysis (PCA) technique, which is, according to Yong and Pearce (2013, p. 84), *"Is best to pick the extraction technique based on your research question and the ease of interpretation."* This extraction technique was applied to obtain factor solutions of smaller sets of variables from a larger dataset. In this approach, a suitable number of factors were retained, and they were named according to their nature and the design of the study. It is important to note that extracting many factors might present undesirable error variance, but extracting few factors might leave out valuable common variance.

Before checking the appropriateness of Factor Analysis, statistical measures like the Kaiser-Meyer-Olkin (KMO), Kaiser's criterion, and Bartlett's test of sphericity were performed to test whether the data and the sample size were adequate for factor analysis to be considered appropriate. The KMO index ranges from 0 and 1, that a greater than 0.5 KMO value and a significant Bartlett's test ($p < 0.05$) are considered as acceptable factor analysis (Brace, Kemp, & Snelgar, 2003). Another measure is to create a scree plot, i.e., a graph of the eigenvalues (y-axis) of all the factors (x-axis) where the factors are listed in decreasing order of their eigenvalues. In other words, the approach shows the number of factors to be retained is the data points that are above the break (i.e., point of inflexion). The inflexion point is the point where the curve starts to level off. The test is only reliable when the researcher has a sample of at least 200 (Yong & Pearce, 2013). Furthermore, eigenvalues are used to condense the variance in a correlation matrix. They are the variance extracted by the factor(s), and an eigenvalue of 1.0 or more is retained for further investigation (Tabachnick & Fidell, 2007). If the eigenvalue for any item is close to zero, then it should be dealt with by deleting the item (statement).

Factor Size and Loadings

Before proceeding with factor analysis, the researcher should ensure the normality of the distribution of variables (Tabachnick & Fidell, 2007). If variables are normally distributed, this will produce reliable results. The descriptive analysis, mean, and standard deviation values proved the approximately normal distribution of variables of this study.

The sample size and strength of the relationship among items are the two main issues for assessing data suitability. When it comes to the appropriate sample size for conducting factor analysis, there is little agreement on the best number; the general recommendation is that the larger the number, the better to ensure higher reliability of correlation coefficients among the different variables (Tanaka, 1987). Tabachnick and Fidell (2001, p. 588) suggest that *"it is comforting to have a least 300 cases for factor analysis."* Other authors such as Nunnally (1978) recommend a 10 to 1 ratio, which means 10 cases for each item to be factor analysed, and five cases are sufficient in most cases (Tabachnick & Fidell, 2001). Pallant proposes that the ideal overall sample size should be 150 or over (Pallant, 2007). Furthermore, the larger sample size will diminish the error in the data, and so EFA generally works better with larger sample sizes. For the study, the number of cases was 1000; (790: the local community and 210: visitors), which fulfilled the condition, and it was adequate to proceed with checking other conditions. However, Guadagnoli and Velicer (1988) proposed that if the dataset has several high factor loading scores ($r > 0.80$), then a smaller size ($n > 150$) should be sufficient.

Regarding measuring how much the variable contributes to the factor, high factor loading scores indicate that the dimensions of the factors are better accounted for by the variables (Yong & Pearce, 2013). The greater the loading, the more the variable is a true measure of the factor. Comrey and Lee (1992) suggest that loadings in excess of 0.71 (50% overlapping) are considered excellent, 0.63 (40% overlapping variance) very good, 0.55 (30% overlapping variance) good, 0.45 (20% overlapping variance) fair, and 0.32 (10% overlapping) poor. The choice for the cut-off point of the size of loading was left to the researcher's preference.

Rotation Methods and Interpretations of Factor Loadings

For a better explanation of each factor, the rotation measure is applied to attain a simple optimal structure through maximizing the number of high loadings on each variable (item) (Brace et al., 2003; Bryman & Cramer, 2001; Yong & Pearce, 2013). This means the larger loading values mean higher contributions to the factor(s). Therefore, to maximize the explanation of the variance, the rotation technique that was applied is an orthogonal rotation (Varimax Rotation), which according to Bryman and Cramer (2001, p. 279): *"produces factors which are unrelated to or independent of one another."* Hence, applying the principal component method with varimax rotation was used to simplify the interpretation of factors and minimize the number of variables that had a low loading on each factor.

Furthermore, when interpreting the factors, there is a need to look at the loadings to determine the strength of the relationships. Also, the signs of the loadings show the direction of the correlation, however, they do not affect the interpretation of the magnitude of the factor loading or the number of factors to retain (Kline, 1994).

3.4.2. Data Analysis of the Interview: Thematic Analysis

Qualitative data analysis refers to the formation of a stable relationship between different themes of the data set about in the research. The objective of analysing interview data was to manage consistency within and between the officials in the MOT and tourism business managers, as well as to merge the outcomes with the results from the analysis of the questionnaires in order to gain a comprehensive understanding of the development of the tourism sector in Oman.

All interviewees were coded, for instance, the officials in the Ministry were coded by the code MOT, followed by a first letter of the interviewee's city or region and a number of the participants. For example, one of the government officials' interviewees was coded as MOTM01. The same process was applied to the private sector where managers were coded by the code PS by the first letter of the interviewee's city or region and a number of the participants, for example, PSM01. The participants were coded this way for ease of referencing participants.

Denzin and Lincoln (1998) note that the researcher's closeness and familiarity with the data is the key relationship in the identification of themes in qualitative analysis. Thus, by linking data, it is possible to make connections among categories and themes. The main idea is to build up an index of main themes (and sub-themes), and the views of each interviewee with regards to a particular theme are entered beneath this theme into the framework (Bryman, 2008a) as was done in Chapter 6: Interview Analysis. The framework was then applied to the data, which had been organized into core themes after the researcher's analysis of the interview transcripts.

The thematic analysis for this study was conducted based on the five processes outlined by Castleberry and Nolen (2018):

a) compiling to find the meaningful responses by transcribing the data;
b) dissembling, taking the data apart, and creating meaningful groupings that are done through coding (identification of themes, concepts, and ideas that have some connections with each other);
c) reassembling, which the codes or categorizes to which each concept is mapped, and are then put into context with each other to create themes;
d) interpreting the data, and
e) concluding to respond to the aim and objective of the study.

The interviews were conducted in both Arabic and English, depending on the interviewees' desire. With participants' verbal and written permission, the audio of the interviews was digitally recorded. The audio recording was favoured over writing answers and comments because it ensured that interview time was efficiently used. Recording of the interviews guaranteed that the whole essence of the interview was captured, and the complete data could therefore be analysed. Thus, independent checking, analysis, and replication were guaranteed in recorded interviews.

The information collected in the semi-structured interviews was firstly transcribed from the recorded interviews and translated from Arabic to English. Based on the finalized transcript of all 12 interviews, each was categorized and grouped into several main themes using thematic analysis in the second phase. Atkinson (1998, p. 56) states that *"It will take from 3 to 6 hours of transcribing time per 1 hour of tape."* This is because, by doing so, it ensures that the resultant analysis has more credibility (Bryman, 2008b). The transcription process of interviews conducted in this research was not different. The researcher needed roughly five hours on average to transcribe one hour of the interview. While listening to the recordings during the transcription process, the researcher was able to get a clear grasp of the topics discussed and the various opinions of the persons interviewed. Also, some questions not found in the interview guide, and which arose during the interview were transcribed. Furthermore, the researcher was obliged to summarize remotely relevant content as well as eliminate unrelated discussion during the data transcription because, as Dey (1993, p. 81) says, *"It makes no sense to read through more than once any data that is irrelevant to the analysis."* By eliminating all the unwanted data, efficiency in the data analysis was guaranteed because the researcher was then able to focus exclusively on the relevant data. Again, all the transcriptions, which followed the original flow of the interviews to keep the discussion in context, were double-checked to ensure accuracy.

Mindful of the existence of different software used in aiding the analysis of qualitative interviews such as NVivo, the researcher opted to do an in-depth content analysis of the interview transcripts in which key themes were identified. The main motivation behind the adoption of a content analysis approach, without using any software was because there were only 12 interviews, and the interviewees came from different sectors (private and public). The number of interviews did not, therefore, warrant the use of a sophisticated computerized software program for their analysis as this could be done manually. Additionally, using the software may not be effective with multiple languages. The interviews were conducted in both Arabic and English, where the Arabic speakers may use a particular word, which can be translated using several possibilities in English, so the software may not be able to characterize the difference. Furthermore, several official tourism documents were combined with the results of the interviews to describe the level of tourism development and the management of its development in the Sultanate, such as the sessions between Majlis Al-Shura (Omani Parliament) members and the Minister of Tourism (see *Table 3.7*). These sessions were in Arabic, where the information collected and transcribed from the visual document on YouTube and translated to English. The transcription process of those sessions was similar to the interviews. The researcher needed roughly 3-4 hours on average, to transcribe the sessions.

3.5. ETHICAL CONSIDERATIONS

Research ethics are one of the most critical components of the study to ensure that the research was conducted based on ethical obligations and considerations before the data collection process. Those ethical considerations are rules and principles which are formed to avoid poor practice, malpractice, and harm to the people and fields they intend to study. Thus, to avoid the appearance of ethical issues when collecting data, and its negative effect on the quality of the research results, this study has been guided by the University of Exeter, Business School's *Code of Good Practice* and the *University's Research Ethics Framework* in the conduct of research and the regulations of the Ministry of Higher Education, Research and Innovation in Oman where the field study was carried out.

The researcher was bound by ethical standards because the research interviews and survey questionnaires contained significant ethical implications. As a result, a Participant Information Sheet and Consent Form templates were prepared (see *Appendices I and II*). These templates were adjusted to ensure that the level and detail of information provided, and the language used, was tailored towards participants. At every stage of the research, confidentiality and anonymity of data and information generated from the participants' responses were securely ensured and only used for research purposes. As mentioned in the consent form, the researcher ensured not including the participant's identity and their right to refuse to participate in the online questionnaire. Also, participation in the interviewing process was entirely voluntary, and the participants were allowed to withdraw at any moment. However, the disclosure of respondent identity was based on his or her permission. Again, respondents were assured that all individual responses would only be viewed by researchers from the University of Exeter in the UK, and the Ministry of Tourism and the Ministry of Higher Education, Research, and Innovation in Oman. Remarkably, there was also no hesitation among the respondents as well as to any other authority while conducting the research. Also, enough time was given to the respondent so that they could depict their right view on research questions.

Moreover, the ethical issue of respecting the intellectual property rights of other authors and researchers was followed convincingly. This includes avoiding plagiarism and its related issues so that the credibility of the study and information could be maintained. Hence, while conducting the research, usage of any secondary data, such as previous researches and articles, from any source, was acknowledged with appropriate reference. The researcher took care of the fact that self-interpretation must not be part of the data collection process in both primary and secondary sources.

3.6. SUMMARY

This chapter explains the research design and methodological approaches used in undertaking this research and the rationale behind the choice of the research strategy (case study). Data collection was conducted using a mixed-methods approach and analyzed by both factor analysis, and thematic analysis.

The following chapter presents an overview of the development of the tourism sector in the Sultanate of Oman and the contribution of the sector to the Sultanate's economy.

CHAPTER FOUR: THE CASE OF THE SULTANATE OF OMAN

4.1 OVERVIEW

This chapter provides an overview of the development of the tourism sector and its capabilities and influences on Oman's macro-economic development through viewing the historical developments of the sector, identifying the forces affecting the sector development process, highlighting the national development process and strategies, and understanding the critical potential tourism elements and indicators related to the sector.

This chapter consists of five main sections presenting the themes derived from the research objectives. Section 4.2 presents the geographical and administrative characteristics of Oman. Section 4.3 gives a synopsis of Oman’s development strategies at the national level. The evolution of the tourism sector is viewed in section 4.4, with an emphasis on the contribution of the sector. Section 4.5 presents the sector organizations (DMO: The Ministry of Tourism), laws and regulations, employment, marketing and promotional activities, and the sector's competitiveness. The last section, 4.6, presents the primary factors of developing the sector, the sector’s budgets, the role of PPPs, the chief operating sectors, the sector’s contribution to the economy, and its investments and projects.

4.2 THE SULTANATE OF OMAN

The Sultanate is located on the eastern edge of the Arabian Gulf (the Persian Gulf), bordered by Saudi Arabia, the UAE (United Arab Emirates), and Yemen (Figure 4.1). The country is one of the oldest independent Arab states and once held an empire, *the Omani Empire*, which reached its peak in the nineteenth century (Henderson, 2015, p. 353). With a total area of 310,000 square kilometres, Oman's geographical features include mountains, and coastal plains, approximately 82% of the territory is sand and desert, which is labelled the Empty Quarter (Henderson, 2015, p. 353). Administratively, the Sultanate is divided into nine regions (governorates): Muscat (the capital), Dhofar, Musandam, A'Dhahira, Al-Batinah, A'Dakhliyah, Al-Wusta, Al-Burymi, and Al-Sharqiyah. The population of Oman is over 4.4m and includes Omani nationals (61%) and expatriates (39%) (NCSI, 2020). The country enjoys a stable political and social system, which is enhanced by an excellent relationship with its neighbours. As a result, the Global Terrorism Index 2019 marked Oman as a "*terrorism-free*" country where it scored Zero (0). Further, the country was ranked as the 69th most peaceful country in the world, according to the Global Peace Index, 2019.

Oman’s economy is moving gradually on the path of economic development. In 2010, the United Nations Development Programme (UNDP) ranked Oman as the most improved nation globally regarding development during the preceding 40 years (Oseiagyemang, 2020). Since the 1970s, the Sultanate has been transformed from a subsistence economy to one that has moderate economic growth and development, mainly influenced by its enormous oil reserves. Oman's oil wealth has been a traditional pillar for the growth of the economy, which approximates to 90% of government revenues and accounts for more than 50% of GDP (Strolla & Peri, 2016, p. 58). The sector primarily supports the country's standard of living as well as stimulate its infrastructure and essential services, including utilities, telecommunications, transportation, public education, and medical services. According to the World Bank and the Omani Ministry of Finance annual reports, the country's GDP averaged US$ 19.50bn[3] from 1960 until 2018, reaching an all-time high of US$ 79.27bn in 2018 and a record low of US$ 0.04bn in 1960. Additionally, Oman's economy consists of substantial and growing sectors such as *Agriculture and Fisheries Sector:* relatively smaller sector of Oman's economy, *Manufacturing Sector:* a target of raising the share of manufacturing to 15% of the GDP by 2020 and the dominated non-GDP sector, s*ervices (Banking and Financial, Telecommunications, Business Services, and Tourism)* that comprised 40.7% of total economic activity (OBG, 2016).

Figure 4.1 The Sultanate of Oman Map
Source. Maps of the World, (2018); https://images.app.goo.gl/J3H3XhBDJZQMsTc67

3 Omani Riyal (OMR) is pegged to the USD at the rate of 1 OMR = 2.60 USD

4.3 NATIONAL DEVELOPMENT STRATEGIES

The Omani government has directed the development of the economy through five-year development plans. Each five-year plan is nested within a long-term development strategy (25 years), the first covering the period 1970-95, and the second, referred to as Vision 2020, covering the period 1996-2020, and currently, the Vision 2040, covering the period 2015-2040. Both Vision 2020 and Vision 2040 strategies have been actively making efforts to reduce the country's economic reliance on non-renewable resources, oil and gas, and to avoid volatile oil prices by stressing the promotion of non-oil sectors of the economy, finding alternatives to support national economic and development efforts, and establishing significant reform programs to diversify the economy sources such as tourism, logistics, manufacturing, mining, and fisheries sectors.

4.3.1 Oman Renaissance (1970-1995)

This period was regarded as the beginning of a new era in development in the Sultanate, which was divided into 4 development plans. The First and Second Five-Year Development Plans (1976-1985) coincided with the boom in the oil sector, aimed at establishing the country's infrastructure and expansion, development of the remote provinces, and promoting human resources development as well as encouraging the foundation for an active and competitive private-sector-led economy (privatization). The Third and Fourth Five-Year Plans (1986-1995) were intended to improve the provision of health, education, and other social services as well as expand other economic sectors such as agriculture, fishing, manufacturing, and mining. Also, the period was involved in creating and developing human resources, reshaping the role of the government in the economy, and providing the appropriate conditions for the realization of economic diversification.

4.3.2 Vision Economy: OMAN 2020

At the end of the Fourth Five-Year Plan, the government unveiled a long-term socio-economic development strategy entitled "*the Vision for Oman's Economy: Oman 2020*". This government-led masterplan was the first of its kind in the GCC region with a focus on a transition from an oil-based economy. It was formulated to work as a guideline for the period (1995-2020). The Vision was based on 4 pillars (SCP, 2017): 1) *economic balance and sustainability*, 2) *human resource development*, 3) *economic diversification*, 4) *private sector development*. According to Al-Wahaibi (2016), the main recommendations of Vision 2020 were to identify the potentials of every targeted sector locally and internationally; formulate attractive policies and regulations; incorporate the private sector into the national development programs and the encouragement of strategic partnership with the private sector, and lastly, encourage Omanization in the private sector. Consequently, the potential results of successful implementation of the Vision according to the Ministry of Information (MOI, 2000), is that the crude oil sector's share in the national GDP would fall from 41% in 1996 to under than 10% in 2020, the gas contribution would rise from 1% to 10%, and the non-oil industrial sector from 7.5% in 1996 to 29% in 2020 (Valeri, 2005, p. 2).

Nevertheless, more than 20 years have passed since launching Vision 2020 in 1995 and with only a year left to achieve the vision, it is not possible to achieve the objectives intended. According to Al-Kindi and Al-Saqari (2017), the Vision was not able to achieve the set objectives, which failed to diversify the production base and reduce dependence on oil. Kept away from reaching the balance point between public expenditure and income, government spending has increased significantly, increasing the size of the general deficit and caused a lack of development and support of the private sector. By assessing Vision 2020 and by identifying the gaps in its content, as well as the reasons that prevented the achievement of its objectives, there is now an urgent necessity for future visions like the current Vision: Oman 2040 to be re-evaluated.

4.3.3 TANFEEDH: The National Program for Enhancing Economic Diversification

TANFEEDH in Arabic means *to get it done*. This program was initiated by the Royal Court (Diwan) in 2016 as an urgent response to increasing financial burdens on the government that was rapidly going through financial resources caused by the sudden plunge in oil prices to below US$ 30 a barrel (Al-Wahaibi, 2016). Consequently, this drastic drop in prices affected the country's revenues, which forced austerity measures such as removing fuel subsidies, increasing taxes, and cutting government employees' annual salary increments. For example, the total public expenditure fell from 7.9% to OMR 8.1bn in 2016 and from OMR 8.8bn a year earlier fell by 7.9% from US$ 22.9bn in 2015 to US$ 21.1bn in 2016, with a 39% decrease in the participation and support ledger, which includes state subsidies (TBY, 2017). More importantly, the program introduced more than 100 projects in each targeted sector. These initiatives are linked to a specific period for implementation. The source of funding for each one of these projects was identified by engaging the government and the public sector.

Moreover, placing a significant emphasis on promoting Oman as a tourism destination, the Tourism Sector Laboratory, under TANFEEDH, approved the implementation of 15 initiatives (see *Figure 4.2*). The MOT, in cooperation with the Implementation Support and Follow-up Unit (ISFU), initiated the implementation of these initiatives in 2017. Furthermore, the MOT has added a new initiative (16), "*Stimulating Domestic Tourism,"* to promote local tourism.

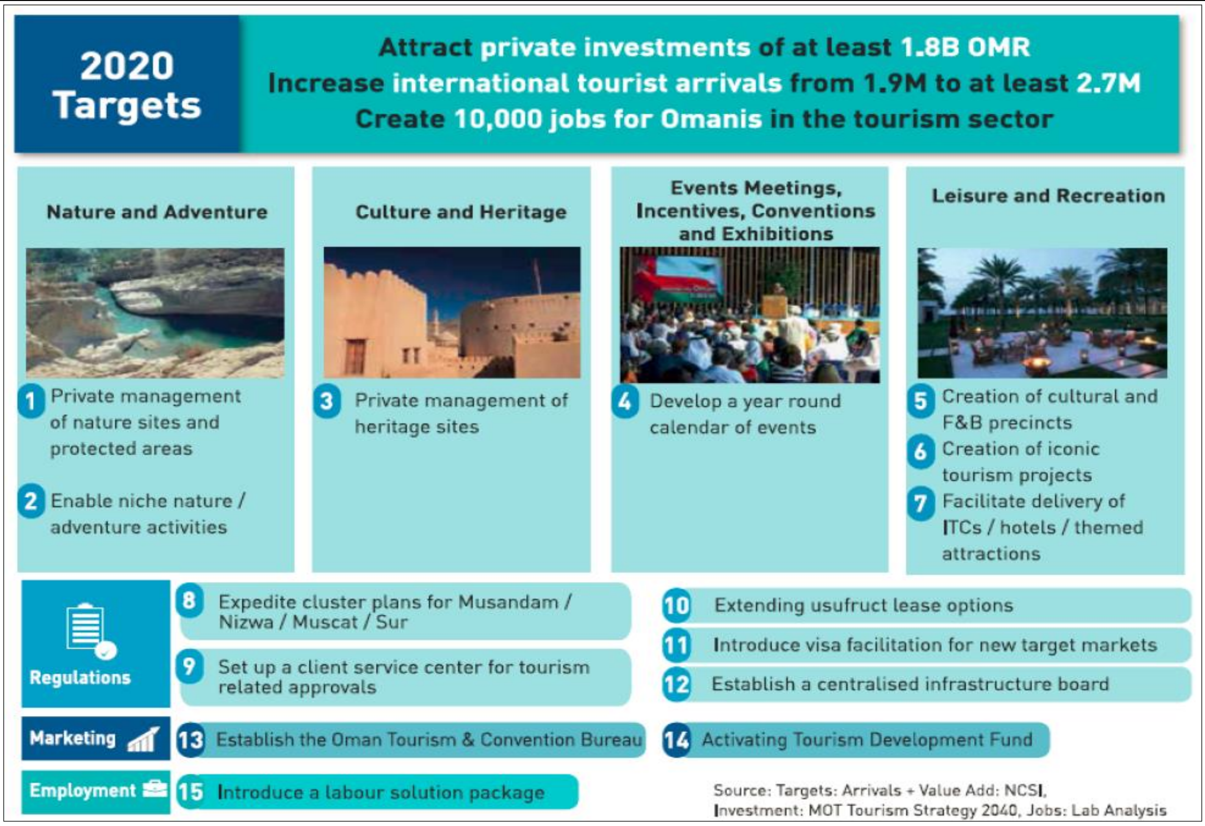

Figure 4.2 TANFEEDH Tourism Sector Initiatives
Source. TANFEED (2016, p. 19)

4.3.4 Oman Future Vision: OMAN 2040

On the same track as Vision 2020, the government set the third long-term economic strategy, Vision 2040 in 2015, building on what was completed under the previous Five-Year Plan (2010-2015). The Vision aims at building a non-oil economy and diversifying its economic activities from the oil and gas sector to the services sector, and expanding on the various programs (*TANFEEDH Projects*) that were initiated under Vision 2020. Also, taking a different approach to financing development as state expenditure increased drastically beyond budget, the Vision has identified *Manufacturing, Transport & Logistics, Tourism, Fisheries, and Mining* as the main future policy sectors of the Oman economy (see *Figure 4.3*). The criteria for choosing those economic diversification sectors was mainly to propel the economy into a sustainable and continuous growth stage of development (SCP, 2017) by offering more and better employment opportunities, high competitiveness internationally, increasing government revenues and exports, and developing growth in other sectors.

Mining

- Share of the sector in GDP is 0.4% and is expected to achieve 0.5% by 2020.
- Average growth is forecasted at 6.5% per annum.
- Total investment is expected to increase to OMR 739bn.

Fisheries

- Share of the sector in GDP is 0.5%.and is expected to achieve 0.6% by 2020.
- Average growth is forecasted at 7% per annum.
- Total investment is expected to increase to OMR 1.1bn.

Tourism

- Share of the sector in GDP is 3% and is expected to achieve 3.3% by 2020.
- Average growth is forecasted at 5.3% per annum.
- Total investment is expected to increase to OMR 1.6bn.

Transport & Logistics

- Share of the sector in GDP is 6.2% and is expected to increase to 7% in the Plan.
- Average growth is forecasted at 5.4% per annum.
- Total investment is expected to increase to OMR 6.1bn in the Plan.

Manufacturing

- Share of the sector in GDP is 9.8% and is expected to achieve 11% by 2020.
- Average growth in the 9th Plan is 7.8%..
- Total investment is expected to increase to OMR 2.6bn.

Figure 4.3 Sectors' Contribution to the Economy
Source. SCP (2017)

4.4 EVOLUTION OF OMAN TOURISM SECTOR

The evolution of tourism is closely associated with the development of tourism destinations. In Oman, the tourism sector has experienced various developing periods starting in the early 1970s and from there onward.

4.4.1 Oman (the 1970s-the 1980s): Unknown Destination

Until 1970, the Sultanate was an insular nation, and very little was known about the country. However, Muscat, the capital, was frequently visited by European trade ships, but few people from the outside world had until then travelled to Oman's interior. The tourism sector did not receive any governmental intervention, and the development of the sector was not included in the country's macroeconomic development plans. Shaw and Williams (1994) state that many countries are not ready to be a mass tourist attraction due to a lack of infrastructure, instability, and conflict and the official reason for Oman's neglected or tourism industry in the 1970s and most of the 1980s were these cited reasons. Another accepted reason was the authorities' fear of the socio-political consequences brought about by rapid changes to a country that was, until 1970, almost isolated from the rest of the world to then become a centre of mass international tourism.

Later, during the 1980s, the country opened its doors to international tourism, and the traditional attitude toward tourism began to change slightly. This change may have been, due to a worsening of the economic difficulties, the low oil revenues, increasing awareness of the potential of the sector to the country's income, and the possibility of generating much-needed employment opportunities (Winkler, 2007). As a result, in 1989, the Department of Tourism was established within the Ministry of Commerce and Industry (MOCI) to encourage domestic tourism initiatives, such as building rest houses in the provinces for the local visitors. Furthermore, the beginning of international tourism in the country was naturally directed at GCC tourists, reflected by the abolishment of the visa requirement in 1987, and as a result, in 1988 a considerable number of GCC nationals visited Oman (Winkler, 2007). Again, the preventive policy toward non-GCC tourists remained in force, despite the intensifying of economic difficulties, as mentioned earlier.

4.4.2 Oman (the 1990s and Forward): Diversification in the Economy Sources

In the early 1990s, a new phase of Oman’s tourism sector began. The government gradually further relaxed its visa rules to encourage non-GCC tourism and business ventures. The decision to open up to international tourism was taken only in 1990, a year in which a study was commissioned from an international consulting firm, *Shankland Cox Limited*. The overall objective of the study was to develop a strategy for tourism that reflected the attractions of the Sultanate to domestic and international markets, thus maximizing the potential economic benefits of tourism within the limits imposed by the need to protect cultural values and the environment, and providing opportunities for diversifying the economy and reducing regional economic disparities. As a result, the number of international tourists in the year 1993 amounted to 245,000 as compared with only 126,000 in 1988 (WTO, 1994).

Since the beginning of the millennium, the tourism sector has achieved progressive changes due to the rapid increase of GCC tourists and the continuing growth of international tourism demand for a new and exotic destination. Also, the expansion of tourist services and facilities such as more direct flights, international airports, accommodation, more national and human-made attractions should continue to assist the growth and evolution of the sector.

4.4.3 Oman's Tourism Strategy (2016-2040): New Era

The Ministry of Tourism, in early 2016, launched the National Tourism Strategy (NTS) an integrated development plan, which falls in line with the comprehensive Future Vision (Oman 2040) and the regional and international developments in the sector over the past years. The NTS outlines the roadmap for tourism development for the sector over the next quarter-century (2016-2040) through developmental programs that strengthen tourism marketing, develop human resources, and support product development and competitiveness in the sector. As demonstrated in Figure 4.4, the strategy is structured into four components: 1*) Strategy Goal and Objectives*, 2) *Value for Stakeholders*, 3) *Strategy Drivers*, including 4 themes, and 4) *Strategy Enablers*, including 3 themes (THR/MOT, 2016, p. 39). Moreover, the strategy outlines a series of targets: 1) focuses on enhancing domestic tourism, which dominates about 50% by strategy, 2) targets 6-10% rise in the contribution of the sector to the GDP, 3) to have an investment value of OMR 18.9bn (US$ 48.6bn) through increasing the contribution of the private sector in tourism projects to 88%, and government investments by 12%, which includes infrastructure projects (THR/MOT, 2016). The approximate investment by the government is estimated at OMR 2.36bn (US$ 6.05bn) over the 25-year life of the strategy, which represents 12% of total investment while enhancing private sector activities by 88%. Giving this statement before the Al-Shura Council (the Omani Parliament), the Minister of Tourism mentioned the total investments expected in the tourism sector by 2040 stands at OMR 19bn (US$ 49bn), of which 55% are investments in accommodation and resorts, 41% will be dedicated to tourism infrastructure, 3% for the tourist experiences system, while 1% are for administrative investments. The last target is to boost the process by raising the number of people working in the tourism sector to 535,000 by the end of 2040 and doubling the number of yearly inbound visitors to 5m.

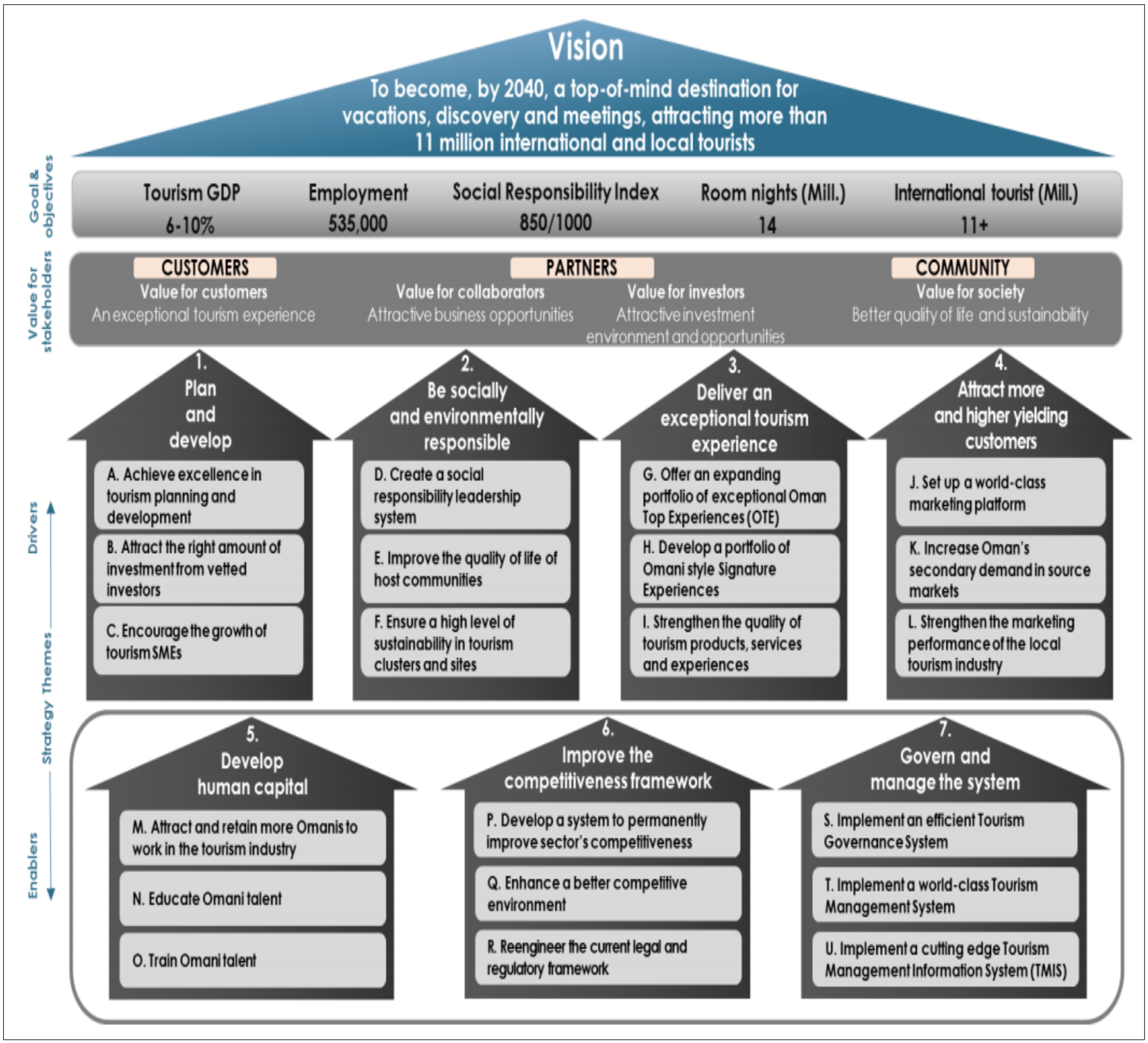

Figure 4.4 Oman Tourism Strategy Map, 2016–2040
Source. THR/MOT (2016)

The strategy was designed to be completed in 3 stages: *Preparation* (2016-20), *Growth* (2021-30), and *Stability* (2031-40), as presented in the figure below (4.5).

2016-2020 **Preparation Phase** *(Investments OMR 3.937)*

- Launching of a Top Omani Tourism Experience as well as a program of Authentic Omani Experiences,
- Developing more than 5,620 new hotel rooms,
- Creating more than 76,384 new direct job opportunities and
- Implementing leadership and empowerment initiatives.

2021-2030 **Implementation Phase** *(Investments OMR 3.140)*

- Launching of three additional Omani Top Experiences,
- Adding more than 15,419 new hotel rooms and
- Creating more than 126,900 direct jobs.

2031-2040 **Stability Phase** *(Investments OMR 11.859)*

- Including another three Top Omani Experiences,
- Adding more than 29,596 new hotel rooms and
- Leading to more than 242,990 new direct jobs

Figure 4.5 National Tourism Strategy (2040) Development Phases
Source. Adapted from THR/MOT (2016) and OmanObserver (2016)

4.5 OMAN DESTINATION MANAGEMENT ORGANIZATION (DMO)

Sharpley (2002b) emphasizes that most, if not all, international tourism destinations organize and promote tourism through a national body. However, the degree and nature of the intervention, as well as the level of public financial support or investment, vary according to a variety of factors. These national organizations (DMOs) are typically the most powerful within a country and set the overall agenda for tourism administration like the Oman Ministry of Tourism or private companies like *OMRAN, Oman Tourism Development Company*, or *ASAAS, Muscat National Development, and Investment Company*, in which the government is a majority shareholder with considerable influence on decisions making. Their aims include the generation of guidelines and objectives for the development and management of tourism, finances, the implementation of infrastructure, and to stimulate and encourage the private sector's investments. For example, the success of countries like the UAE and Qatar in developing the tourism sector has resulted, in part, from government support.

Until the establishment of the Ministry of Tourism (MOT) in June 2004, (later to become the Ministry of Heritage and Tourism (MOHT) in August 2020), a Directorate General of Tourism established in 2002, within the MOCI, was in charge of tourism, including financial allocations and assets. The MOT is solely responsible for the development and management of the sector. The Ministry is the regulator, policymaker, and promoter of the tourism sector (OBG, 2016). The Ministry's vision is mainly to develop tourism as an essential and sustainable socio-economic sector in a manner that reflects the Sultanate's historical, cultural and environmental heritage and sense of traditional hospitality and values (MOT, 2005). Additionally, the Ministry, in coordination with the concerned government authorities, according to Oman Law of Tourism (33/2003: Article 2), prepare national plans and programs for the development of tourism (e.g., NTS), monitor and analyse tourism trends that influence tourism competitiveness and quality, proposes measures for the development of businesses (small local enterprises), provide various incentive and development programs and consulting services to potential investors. In addition to this, they specify the means of executing the projects, coordinate between the existing tourist sectors and projects and assess their activities.

Moreover, in order to promote direct government investment, the government created the investment arm of the MOT in the tourism sector, the Oman Tourism Development Company (OMRAN). Since the company was established in 2005, all activities related to tourism investment in the Ministry have been handed to OMRAN. This is in-line with the vision to strengthen and diversify the economy through managing assets and investments in the sector’s infrastructure, developing and operating unequalled tourist sites, providing investment opportunities for local and foreign investors as well as attracting leading brands in tourism to the Sultanate. However, despite OMRAN, financial support is still required from the government, as it is still required to make investments into the sector by making local and international partners. The current investments reached OMR 600m (US$ 1.5bn), according to OMRAN, and are spread over projects managed by the company in various governorates of the Sultanate. Moreover, the company has been involved in the upcoming mega-development, including Sultan Qaboos Port Waterfront Development, and Madinat (City) Al-Irfan Urban that is home to the iconic Oman Convention and Exhibition Centre (OCEC), all aiming to extend economic benefits well beyond improving tourism logistics.

4.5.1 Oman Tourism Laws and Regulations

The development of the tourism sector requires the creation of tourism law. The Oman Law of Tourism aims at the encouragement and development of tourism resources and investments to increase its contribution to the national economy (Oman Law of Tourism, 33/2003: Article 1). As the regulator and policymaker, the MOT formulates adequate rules and regulations for developing and maintaining the sector and modifies the existing tourism laws and regulations at national, regional, and international levels. However, the sector has suffered from overlapping regulations adopted by the different public authorities as it relates to issuing licenses and approvals (GulfNews, 2016b). Thus, in order to address some of the organizational deficiencies in Executive Regulation No. 91/2003, Executive Regulation No. 39/2016 was issued to cope with the current and future needs of the tourism sector. The government has amended the policies and legislations that inhibit investment (e.g., FDI) in the sector, usufruct rights, public and private land leasing contracts, licenses for tourism investment, and visa issuance. An example of promoting private sector investments in the sector can be seen when the government relaxed the country's property laws, allowing foreigners to own property in tourism-designated areas of the Sultanate. All such efforts are part of Vision 2020 and following Vision 2040. However, the review and updating of the tourism law are delayed until after the completion of the national tourism strategy (MOT, 2016a). Even three years later, the Tourism Law, in terms of tourism investments and projects, which is linked with the Foreign Investment Law, has not been updated (MOT, 2019).

4.5.2 Employment in the Tourism Sector

The workforce (Omanis and expatriates) form a crucial part of the tourism development process. The Sixth Five-Year Plan (2001-2005) emphasized the development of the Omani workforce to meet an expected increase of demand for labour in the sector by an increase in the rate of Omanization to 80% by 2020 (MONE, 2002). As a result, the employment criteria have been increased in the tourism and hospitality sector, with more than 40% of Omanization in the hotel sector, according to the NCSI statistics. According to the Ministry of Manpower (MOM), which is currently the Ministry of Labour, the Omanization rate in the tourism sector was 90% in 2010, compared with approximately 65% across all sectors of the economy (TBY, 2016).

Notwithstanding, in neighbouring countries, tourism expansion has entailed increasing the number of foreign workers, and in Oman, the effect is the addition of a vast number of new work opportunities for nationals in different subsectors such as airlines, tours, travel agencies, hotels, and tourist car rentals. Table 4.1 illustrates the number of workers in the sector that has shown a continued increase with more than 100,000 direct employments. For example, in 2002, the number of workers was nearly 8,000, while in 2018, the number reached just 109,000, with about 31% being Omanis. This would be directly related to the government's policies to encourage the sector through the establishment of small and medium enterprises (e.g., cafes and restaurants) as well as hotels. In addition, as per the strategy (NTS), the Sultanate plans to employ more than 500,000 people in the sector, 75% of whom to be Omani nationals in line with the sultanate's Omanization policy. However, the ability of the sector to achieve the target number depends mostly on the quality and competence of the workforce in tourism activities. Furthermore, it is essential to note that due to the pandemic Covid-19 and closure of all tourism activities, the number of employees in the sector has dropped dramatically in 2020, which, as a result, affected the sector's workforce.

Table 4.1 Number of Employees (Omanis and Expats) in the Tourism Sector

Year	Number of Employees			Annual Growth %	Omanization %
	Omani	Non-Omanis	Total		
2002	3,054	4,853	7,907	NA	38.6
2003	4,042	5,075	9,117	15	44.3
2004	5,174	5,100	10,274	13	50.4
2005	NA	NA	NA	NA	NA
2006	NA	NA	NA	NA	NA
2007	NA	NA	NA	NA	NA
2008	NA	NA	NA	NA	NA
2009	8,271	46,876	55,147	NA	15
2010	9,391	50,544	59,935	9	15.7
2011	9,829	58,589	68,418	14	14.4
2012	9,558	65,918	75,476	10	12.7
2013	11,963	94,768	106,731	41	11.2
2014	12,791	102,548	115,339	8	11.1
2015	14,713	112,144	126,857	10	11.6
2016	16,979	127,003	143,982	11.8	11.8
2017	10,790	126,571	137,361	-4.8	7.9
2018	15,551	135,457	151,008	9	10.3
2019	16,450	140,777	157,227	4	10.5
2020	15,753	129,505	145,258	-8.2	10.8
2030*	-	-	292,658	-	-
2040*	-	-	535,574	-	75

Source. Adapted from National Centre for Statistics and Information, Ministry of Tourism and Ministry of Manpower Annual Reports (2016-2020), MOT (2016a)
(*) As per National Tourism Strategy (NTS)

4.5.3 Oman Tourism Marketing Activities and Promotion Methods

The tourism sector has been deliberately kept at the high-end, with marketing aimed at visitors who are interested in engaging with the country’s natural resources and socio-culture attractions and activities.

4.5.3.1 Oman Tourism Marketing Strategy

The Omani government always stresses the importance of maintaining the country’s cultural traditions and in addition to the tourist attractions on culture, heritage, and nature to leverage on Oman’s competitive advantages in the global tourism market. In this regard, the government has adopted the *selective tourism strategy* that should focus on the *premium tourist*, the *responsible tourist* who respect the local culture (religion, norms, customs) and environment, and the *high-income tourist* who can add value to the economy. According to the Minister of Tourism, the type of tourism that Oman has achieved so far is a ‘*hosting of visitor’ sort*” (eTurboNews, 2012). This strategy is based on consolidating and enhancing Oman's competitive position in the international markets.

Moreover, in order to benefit from the variety of tourism attractions existing in Oman, the Ministry adopts a set of marketing strategy axes (see *Table 4.2*). The budget allocated for activating the axes should not be less than OMR 9m (US$ 22.94m) annually (MOT, 2019). However, due to the current economic situation and the state budget deficit, the new marketing strategy budget has been reduced. As a result, the MOT has minimized the number of programs and promotional activities due to the local and foreign investors' available financial resources.

Table 4.2 Ministry Marketing Strategy (2016-2040)

Marketing Strategy Axes	What has been done
Marketing Identity (Image)	– Enhancing the Sultanate's image through the programs and packages offered by the partners in the sector.
Oman Tourism and Conference Bureau (OTCB)	– Following up on the implementation of the marketing strategic plan.
E-Marketing	– Evaluating the Ministry's current situation to develop a roadmap to activate e-marketing within the Ministry's primary activities. – Launching the promotional platform of the Sultanate "Discover Oman" in several languages (e.g., Arabic, French, German, Italian, Dutch, and English). – Introducing the electronic platform (E-Concierge) to facilitate the services needed by the tourist.
Support Tourism Sector Partners	– Involving the relevant government agencies, private businesses in the marketing plans.
Markets and Target Segments	– Strengthening marketing and promotional efforts in the current markets. – Identifying new tourist markets such as Russian, American and Chinese. – Facilitating a tourist visa (e.g., e-tourism visa) in cooperation with the Royal Oman Police.

Source. MOT (2019)

4.5.3.2 Oman Destination (Image, Branding, and Promotion)

The image of Oman is a fundamental issue that needs to be addressed if the country is to become a fully competitive tourist destination. At the beginning of the 1990s, the Omani government adopted the slogan *'The Essence of Arabia*' to be distinguished as an exotic, authentic Arabic destination with diverse tourism experiences. In 2002, the consultancy International Development Ireland (IDI) helped Omani officials to develop a marketing strategy using the slogan "*Sultanate of Oman*" that promoted the country in Western markets. Another slogan, '*Bring a friend to Oman*,' was created, promising the visitors that they will experience something unique and different. Later, in 2009, the MOT launched the Oman brand mark, Figure 4.7, that forms Oman's identity. In the following year, 2010, the Sultanate launched its first global branding campaign under the tagline "*Beauty has an Address – Oman*," and has since continued to invest in marketing the country as a premium destination (ZAWYA, 2017).

Figure 4.6 Oman Tourism Brand Mark
Source. Ministry of Tourism

Attracting tourists from the current and targeted markets has led the MOT to establish eleven *International Representation Offices* located in the most important target markets, covering 15 tourist markets (see *Table 4.3*). Ensuring Oman is '*true to the brand*,' these offices are responsible for promoting Oman in the local media, participating in exhibitions, and working as a liaison between the MOT and significant tourism players in those markets (Al-Masroori, 2006). Also, they organize joint promotional campaigns with tourism partners in targeted markets, such as international airlines and travel and tourism companies. To follow up with their progress, the Ministry also reviews and approves the offices' promotional plans and evaluates their performance annually.

Table 4.3 Ministry of International Representation Office

International Representation Office	Location	Target Market
France	Paris	France
GCC Countries	Dubai	UAE, Qatar, Bahrain, Kuwait, Saudi Arabia
Germany	Berlin	Germany, Switzerland, Austria
England	London	England, Ireland
Netherlands	Amsterdam	Netherlands
India	Mumbai	India
Italy	Milan	Italy
Russia	Moscow	Russia

Source. MOT (2019)

Moreover, in order to enhance the Sultanate's position on the world tourism map, the Ministry undertakes marketing and promotional efforts outside the Sultanate through participation in the regional and international travel and tourism exhibitions (see *Table 4.4*). These exhibitions are essential promotional activities for the sector, which allow meetings between the government officials and tourism businesses to introduce and promote the sector in the global tourism market. The MOT is keen to provide some small and medium enterprises with the opportunity to participate in these exhibitions.

Table 4.4 Ministry of Tourism Global Trade Show (International Exhibitions)

Trade Show	Country	Month
ITB Berlin	Berlin, Germany	March
Sea Trade Cruise Global	Miami, USA	April
Arabian Travel Market (ATM)	Dubai, UAE	April
IMEX Frankfurt	Frankfurt, Germany	May

Source. MOT (https://omantourism.gov.om/wps/portal/mot/tourism/oman/home/ministry)

4.5.4 Oman Tourism Competitiveness

Oman was not listed in the WEF Competitiveness Reports until 2009, after establishing the Ministry of Tourism in 2004. The WEF ranks countries by their travel and tourism global competitiveness (see *Table 4.5*). The Index (TTCI) provides a more in-depth understanding of the current position of Oman tourism. In 2019, the Sultanate was globally ranked 58, which was an increase from its position of 66 in 2017 (WEF, 2019). The Tourist Service Infrastructure

Index placed Oman at the rank of (71st), which is determined slow whilst building a unique style environment to attract both business and leisure travellers. The Prioritization of Travel & Tourism Index ranked Oman (68th), which also provides thought that the sector should be more active on a better level by investing in and giving vital importance to the development of the sector. However, the Sultanate surged in the Attractive Business Environment (19th), which must encourage investments locally and internationally.

Table 4.5 Oman Competitiveness on the Global and the GCC Tourism Markets

The Travel & Tourism Competitiveness Index	2009	2011	2013	2015	2017	2019
Oman's Travel & Tourism Global Competitiveness	**68**	**61**	**57**	**65**	**66**	**58**
Prioritization of Travel & Tourism	86	109	60	73	81	68
Government Prioritization of the T&T industry	52	22	12	18	27	27
T&T Government Expenditure	113	122	124	127	119	123
The effectiveness of Marketing and Branding to attract tourists	59	59	23	36	58	28
Tourism Service Infrastructure	61	59	57	62	67	71
Total Number of Countries	133	139	140	141	136	140
Oman's T&T competitiveness at the GCC level	**5**	**4**	**4**	**5**	**5**	**3**
Total Number of the GCC Countries	6	6	6	6	6	6

Source. WEF (2009, 2011, 2013, 2015, 2017, 2019)

4.5.5 Public-Private-Partnerships (PPPs): Government and Private Sector

As demand grows and access to financial resources becomes limited, the government seeks to promote greater involvement of the private sector. By encouraging and supporting the PPPs, the government and private sector investments in the various economic activities should have played an essential role in developing tourist infrastructure and increasing the efficiency of the sector services and other facilities. Such partnerships would also secure the participation of SMEs by allowing them to provide support services to meet tourist's needs, such as catering, transportation, and other services. Furthermore, the collaboration between the government and private businesses are found through several mega tourism projects, which are undertaken in various governorates of the Sultanate. Moreover, as per the strategy (NTS), the government benefits from the expertise of the private sector while fostering new solutions and bringing sufficient funding for the strategy (THR/MOT, 2016). The government, in order to implement the 25-year strategy, attempted to increase the contribution of the private sector in tourism investments and projects by OMR 16.7bn (US$ 42bn). As the Undersecretary of Tourism Ministry stated: "*The investments required implementing the Omani Tourism Strategy (2016-2040) would be about OMR 18.9bn, 88% of which will be borne by the private sector*" (GulfNews, 2016a). However, the government has not yet decided how it will fund the remaining 12% and whether it will need to borrow.

4.6 DEVELOPMENT OF OMAN TOURISM

Oman is in a ‘developing phase’ of the tourism development process, where there are many strengths and opportunities that contribute to the success of the sector and its stability. However, they might turn to weaknesses and threats to the process if not managed and supported rationally.

4.6.1 Factors of Developing the Tourism Sector

Any destination should consist of the following factors: *stability, accessibility, attractions, and infrastructure*, that all facilitate its tourism development. These factors might have positive or negative impacts on the visitors’ judgment, not only of the service experienced but also of the overall visit experience. First, *stability* in the destination’s economic, social, and political domains is essential for tourism, as severe disturbance and volatility deter visitors, foreign investors, and local tourism businesses. The Sultanate’s reputation as a safe destination with meagre crime rates combined with never have been directly involved in any aspect of a Middle Eastern conflict has contributed to the increase in visitors. Secondly, *accessibility*, to attract more visitors, the government, in this regard, has eased visa procedures, allowing visitors from more than 60 countries to receive visas on arrival at the border points. *Attractions*, the third factor, are often the focus of visitor attention and may provide the initial motivation to visit the destination. The Sultanate possesses touristic resources, which are highlighted as the energizing power unit of the tourism sector. Fourthly, *tourism infrastructure* is pivotal to tourism development, which determines the types of services that can be provided to visitors. The presence of good infrastructure and facilities improves tourism's economic impact on the host community (Godfrey & Clarke, 2000). Oman has attributes through the modernization of transport and communications infrastructures, particularly airports in the major cities which provide essential links with Asia, Europe, and the Middle East.

4.6.2 Tourism Sector Budgeting

The government has shown high level of dedication and commitment to developing and financing the country's infrastructure and public services, where all such efforts are part of the government development strategies (e.g., Vision 2020). Since the mid-1970s, almost OMR 11.3bn (US$ 30bn) was invested in infrastructure projects and building airports, roads, and hotels (MOI, 2013). In the government's five-year spending plan (2011-2015), it projected OMR 30bn (US$ 78bn) of expenditure, most of which was allocated to social and transport infrastructure (OBG, 2015). Also, roughly OMR 8bn (US$ 20bn) was allocated to transport, including OMR 6bn (US$ 15.54bn) for airport expansion and OMR 2.4bn (US$3.12bn) for road network development. However, capital investment and government spending are relatively lower than they are in other Middle Eastern countries, notably the UAE, Egypt, Bahrain, and Qatar (Choufany & Younes, 2005).

Significantly, the government’s budgetary efforts were further complemented with the developing of the tourism sector. To support and promote the sector, the government has allocated a considerable budget to achieve the strategy (NTS) objectives, especially those related to enhancing the marketing and promotional campaigns and creating more jobs in the sector. Table 4.6 shows the state general budget for the financial years (2005-2020). The MOT’s actual expenditures have risen since 2005 when it was OMR 365m (US$ 948m) and grew to OMR 1.2bn (US$ 3.1bn) in 2017. In the year 2017, the MOT allocated OMR 73.5m (US$ 191m) as the budget for the development of the sector, when in 2005, the budget was OMR 38.7m (US$ 101m). This is due to on-going and new projects in the tourism sector. Also, the Ministry revenue showed an increase from OMR 1.8m (US$ 4.7m) in 2005 to OMR 13.2m (US$ 34.3m) in 2019. The current and capital expenditures had shifted from nearly a million Omani Rial in 2005 to OMR 12m (US$ 31.2m) in 2019. Since 2016 no budget has been allocated for new projects due to the state budget deficit caused by the current oil crisis. This is a part of the government retrenchment strategy. Moreover, the pandemic Covid-19 has forced the government and private businesses to postpone and even suspend their tourist projects at many sites in the Sultanate. This may trigger major areas of risk for the sector’s development process.

Table 4.6 The Sultanate General Budget for the Financial Years (2005-2020)

Year	Development Budget for the MOT (OMR)					Revenues by the MOT (OMR)			Current and Capital Expenditures by the MOT (OMR)				
	Allocations for on-going projects (000)	Allocations for new projects (000)	Total Allocations (000)	Percent	Actual Expenditure (000)	MoT Revenues (000)	Percent	Total Government Revenues (m)	Current (000)	Capital (000)	Total Expenditures (m)	Percent	Total Government Expenditures (m)
2005	1,910	36,808	38,718	11%	36,500	1,805	0.22%	806	973	15,000	988	0.1%	1,370
2006	34,857	17,200	52,057	14%	375,000	2,984	0.46%	643	2,524	20,000	2,544	0.2%	1,400
2007	15,800	71,922	87,722	18%	500,000	4,419	0.50%	890	3,318	151,000	3,469	0.2%	1,620
2008	15,250	121,870	137,120	19%	725,000	5,148	0.46%	1,130	3,687	155,000	3,842	0.2%	1,952
2009	NA	NA	NA	NA	NA	12,738	0.94%	1,355	4,088	127,000	4,215	0.2%	2,170
2010	NA	NA	NA	NA	NA	13,511	0.91%	1,477	4,322	70,000	4,392	0.2%	2,500
2011	NA	NA	NA	NA	NA	8,516	0.64%	1,340	4,549	52,000	4,601	0.2%	2,750
2012	90,047	10,848	100,895	7%	1,400,000	8,345	0.53%	1,570	5,793	67,000	5,860	0.2%	3,500
2013	NA	NA	NA	NA	NA	8,674	0.49%	1,780	8,980	80,000	9,060	0.2%	4,100
2014	NA	NA	NA	NA	NA	9,971	0.50%	2,000	11,505	100,000	11,605	0.3%	4,525
2015	61,967	47,548	109,515	7%	1,650,000	11,788	0.50%	2,380	13,143	100,000	13,243	0.3%	5,210
2016	72,816	NA	72,816	6%	1,200,000	13,020	0.54%	2,400	12,371	46,000	12,417	0.3%	4,620
2017	73,500	NA	73,500	6%	1,200,000	13,601	0.53%	2,550	11,895	37,000	11,932	0.3%	4,400
2018	NA	NA	NA	NA	NA	13,601	0.53%	2,650	11,943	3,000	11,946	0.3%	4,350
2019	NA	NA	NA	NA	NA	13,220	0.56%	2,350,000	12,046	9,000	12,055	0.3%	4,490
2020*	NA	NA	NA	NA	NA	13,284	0.54%	2,450,000	12,037	18,000	12,055	0.3%	4,590

Source. Ministry of Finance Annual Reports (2005-2020)

(NA) Data not available
(*) Due to the Pandemic Covid-19

4.6.3 Oman Tourism Operating Sectors

The increasing integration of the Sultanate into the global tourism market requires the expansion of the tourist infrastructure development and capacity. The government has been building a large-scale tourism infrastructure to compete with other countries in the region through mainly focusing on the development of accommodation and transportation sectors.

4.6.3.1 Development of Accommodation Sector

The accommodation sector has witnessed a rapid growth in the number of hotels and resorts and their classification throughout the Sultanate's governorates (see *Table 4.7*). While there were only a few hotels with essential services in the 1970s, Oman, by the mid-1980s, boasted two luxury five-star hotels in Muscat, *Al-Bustan Palace* and the *Sheraton* (EIU, 1988). From the mid-1990s, the number of hotels and resorts in the country has been steadily rising in all categories, and by 2019 had increased to 491 establishments in 2019 compared to 100 establishments in 2000. However, most of these hotels are located in the capital region of Muscat (179 of total).

With a particular focus on high-end travel, all the major international hotel chains (international operators) have a presence in the local market, including *Marriott, Hilton, Holiday Inn, Grand Hyatt, Starwood, the Intercontinental,* and *Crowne Plaza*, as well as several domestic hotel groups in operation. The rising number of internationally accredited hotels and resorts are a testament to the sector's growing success. The strategy (NTS) envisages the construction of 50,000 hotel rooms of three-stars and above rating during the next 25 years (OBG, 2015). Also, the government aims, by 2040, to add 33,373 hotel rooms, 29, 287-holiday homerooms, and 17,262 rooms in "*Integrated Tourism Complexes (ICT),*" according to OMRAN Company (ALJAZEERA, 2016). Furthermore, it is essential to note that due to the pandemic Covid-19, the number of guests in hotels and resorts has dropped dramatically in 2020, which, as a result, affected the sector's revenues.

Table 4.7 Development of the Accommodation Sector in Oman

Year	Hotels Classification (Star)					Total	Growth Rate	No. of Rooms	Room Occupancy Ratio (%)	Revenues (000)	Number of Employees		
	Five	Four	Three	Two	Others						Omani	Non-Omani	Total
2000	NA	NA	NA	NA	NA	100	-2.0%	5,312	42	45,744	1,509	2,584	4,093
2001	NA	NA	NA	NA	NA	115	15.0%	5,729	45	46,180	1,557	2,600	4,157
2002	NA	NA	NA	NA	NA	124	7.8%	6,078	41	45,728	1,653	2,539	4,192
2003	NA	NA	NA	NA	NA	133	7.3%	6,473	39	48,369	1,816	2,861	4,677
2004	NA	NA	NA	NA	NA	147	10.5%	7,045	43	58,046	2,299	2,801	5,100
2005	10	14	20	23	94	161	9.5%	8,132	47	78,167	2,661	2,901	5,562
2006	11	14	21	24	103	173	7.5%	8,563	58	110,514	3,366	3,987	7,353
2007	12	13	21	29	115	190	9.8%	9,298	58	132,870	3,773	4,236	8,009
2008	12	14	20	40	110	196	3.2%	9,318	58.4	172,242	3,993	5,252	9,245
2009	13	15	20	38	133	224	14.3%	10,490	49	162,557	4,271	5,330	9,601
2010	14	15	20	41	136	229	2.2%	11,037	51.1	156,730	3,952	5,190	9,142
2011	13	19	26	47	130	248	8.3%	12,195	43.4	153,881	3,861	5,621	9,482
2012	13	19	26	46	144	258	4.0%	12,792	46.9	174,434	3,262	5,943	9,205
2013	12	22	28	52	152	282	9.3%	13,603	47.7	198,832	3,195	6,699	9,894
2014	12	23	28	58	165	286	1.4%	14,815	49.2	216,898	3,370	7,364	10,734
2015	11	23	27	71	186	318	11.2%	16,691	46.9	226,194	3,244	7,809	11,053
2016	15	27	26	77	195	340	6.9%	18,420	47.3	230,332	3,607	8,734	12,341
2017	17	24	26	49	243	359	5.6%	19,520	45.2	236,136	3,999	10,051	14,050
2018	23	19	29	54	287	412	14.8%	22,182	38.4	259638	5,754	12,873	18,627
2019	26	24	38	55	348	491	19.2%	25,139	37.4	276,641	6,364	13,692	20,056
2020*	28	26	44	62	388	548	10.4%	27,298	26.4	102,575	4,206	8,226	12,432

Source. NCSI (2016) and NCSI (2020, pp. 324-336)

(NA) Data not available

(*) Due to the Pandemic Covid-19

4.6.3.2 Development of the Transportation Sector

For more than 40 years, the development of the transportation sector has witnessed a significant surge in government investments to expand and improve the country's transport and logistics capacities across land, sea, and air. Tourist infrastructure is being rapidly enhanced with the new Muscat International Airport (MIA), which was opened in 2018. This airport has a capacity of 12m visitors a year with expansion to accommodate up to 48m in the future (OBG, 2018). Also, Salalah International Airport (SAIA) has a capacity of one million travellers annually, with the ability to increase this further by up to six million. During the Qatar–Saudi Arabia diplomatic conflict, Sohar Airport has been upgraded from a local airport to an international new hub for Qatar Airways. While domestic air routes provide alternative ways to a wide range of destinations within the Sultanate, another popular means of transport within the country is by ferry. Oman has three thousand kilometres of coastline, and this makes the National Ferries Company (NFC) service a necessity for both locals and tourists, providing a vital link between ports and making a considerable saving in travel time. Oman Rail is another major future infrastructure project that will have significant tourism implications on how tourism develops in the Sultanate. The rail network will eventually see some 2,244km of track laid across the Sultanate, connecting its major ports and cities with the neighbouring UAE and becoming part of a pan-Gulf rail network, increasing the number of people travelling around the region.

4.6.4 Oman Tourism Indicators

In tourism, the numbers of tourist arrivals, inbound and outbound tourism consumption, the tourism balance, and tourism added value tourism growth are considered good indicators of the competitiveness of a destination because they reflect and obtain a better idea on the development of the sector.

4.6.4.1 Oman International Tourist Arrivals (Tourist Flows)

Since the mid-1990s, the country's inbound tourism market has shown a substantial diversity, with a high number of arrivals from GCC Countries and countries within Europe, Asia, and Africa. For example, during the period 2001–2002, during the 9/11 crisis, while most of the worldwide tourism destinations suffered a sharp decline, Oman, on the other hand, increased from nearly 710,000 tourists in 2000 to 1.1m. However, because of the international financial crisis of 2008/09, as well as the waves of the Arab Spring of 2011, the number of visitors to Oman had fallen, reaching barely more than 1.3m in 2011 as the global economic downturn continued. However, the period from 2012 to 2019 was remarkable; the number has risen slightly to hit 3.5m of tourist arrivals in 2019, as illustrated in Table 4.8. The increased arrivals demonstrate the effectiveness of marketing efforts and promotional methods implemented by the MOT in collaboration with tourism businesses. However, the tourist arrivals are quite meagre, estimated to be less than 5% in a total of 49m tourists compared to neighbouring countries in the region (GCC-STAT, 2019; TANFEED, 2016). Again, as stated in the strategy (NTS), the sector has a target to hit of 12m tourists by the year 2040.

Although the Sultanate is keen to market itself to the high-end Western market, Oman’s most important market segment comprises visitors from the Gulf region, the largest source market for tourist arrivals representing more than 45% of the total arrivals (see *Table 4.8*). However, the rate at which visitors have been arriving from Asia and Europe outpaces that from the GCC. They account for over 80% of the total visitors annually. These visitors, non-citizen residents of the GCC countries, account for upwards of 40% of Oman’s annual visitors. Furthermore, while the Sultanate’s popularity is growing, data shows a marked rise in international arrivals from Asia (21%) and from the European continent (19%), followed by Arab and other visitors by nearly 8% and 6%, respectively, as shown in the table below. Although the number of Western visitors is expected to show rapid growth, the market is still highly sensitive to regional instability. The sensitivity of Western markets is widely held to be due to the predominance of "*the elder*" visitors who choose to visit Oman during the European winter and who are more likely to be put off by regional events. Again, like most counties all over the world, the pandemic (COVID-19) forced the Sultanate to close its borders to international visitors from March 2020 to October 2020, which as a result, the number of visitors dramatically dropped in comparison to the previous years.

Table 4.8 Number of International Visitors Arrivals by Nationality Group

Year	GCC (*)	%	Other Arabs (**)	%	Asians	%	Westerners	%	Others	%	Total	Growth Rate
2001	654,951	60%	42,147	4%	148,852	14%	171,933	16%	77,269	7%	1,095,152	54%
2002	716,738	64%	22,733	2%	110,417	10%	205,246	18%	57,157	5%	1,112,291	2%
2003	647,485	53%	75,483	6%	201,025	17%	181,325	15%	105,106	9%	1,210,424	9%
2004	539,236	38%	79,746	6%	287,935	20%	309,071	21%	191,095	14%	1,407,083	16%
2005	613,000	56%	33,000	3%	141,000	13%	220,000	20%	95,000	9%	1,102,000	-22%
2006	807,000	58%	38,000	3%	166,000	12%	259,000	19%	114,000	8%	1,384,000	26%
2007	779,000	57%	39,000	3%	167,000	12%	261,000	19%	113,000	8%	1,359,000	-2%
2008	781,000	51%	75,000	5%	295,000	19%	248,000	16%	140,000	9%	1,539,000	13%
2009	839,000	53%	76,000	5%	249,000	16%	270,000	17%	151,000	10%	1,585,000	3%
2010	698,000	47%	80,000	5%	291,000	19%	270,000	18%	161,000	11%	1,500,000	-5%
2011	660,000	47%	70,000	5%	258,000	19%	250,000	18%	155,000	11%	1,393,000	-7%
2012	696,000	41%	103,000	6%	389,000	23%	321,000	19%	204,000	12%	1,713,000	23%
2013	870,000	45%	124,000	6%	435,000	23%	372,000	19%	121,000	6%	1,922,000	12%
2014	961,000	43%	130,000	6%	478,000	21%	508,000	23%	148,000	7%	2,225,000	16%
2015	1,208,000	46%	164,000	6%	578,000	22%	515,000	20%	170,000	6%	2,635,000	18%
2016	1,618,000	50%	185,000	6%	651,000	20%	584,000	18%	169,000	5%	3,207,000	22%
2017	1,588,000	50%	172,000	5%	632,000	20%	605,000	19%	182,000	6%	3,179,000	-1%
2018	1,473,000	45%	268,000	8%	690,000	21%	616,000	19%	194,000	6%	3,242,000	2%
2019	1,413,000	40%	287,000	8%	870,000	25%	726,000	21%	209,000	6%	3,506,000	8%
2020 ***	337,311	NA	NA	NA	123,539	NA	84,737	NA	NA	NA	875,000	-301%

Source. NCSI Annual Reports (2005-2020), Ministry of Commerce and Industry Annual Reports, Mansfeld and Winckler (2007), BMI (2017), The Ministry of National Economy (MONE) Annual Reports

(*) indicates to visitors from the GCC Countries

(**) indicted by visitors from the Arab Countries than the GCC Countries

(***) Due to the Pandemic Covid-19

International tourists visit Oman for a particular purpose; *leisure and recreation, business, and visiting relatives and friends (VRF)*. Table 4.9 shows the average percentage of international tourists focus on both recreation and visiting relatives and friends was almost 39%, followed by business tourism at nearly 16%, and other purposes a weak rate of less than 10%. Interestingly, inbound tourism showed an increase in 2019, which reached 46% from 34% in 2015, while visiting relatives and friends dropped by 9% from 40% in 2015.

Table 4.9 Number of International Tourist Arrivals by Main Purpose of Visit

Year	Leisure & Recreation	%	Visiting Relatives & Friends (VRF)	%	Business	%	Other	%	Total	Growth Rate
2001	379,991	35%	465,957	43%	148,851	14%	100,349	9%	1,095,152	54%
2002	391,007	35%	445,241	40%	159,780	14%	116,264	10%	1,112,291	2%
2003	345,566	29%	587,626	49%	210,533	17%	66,701	6%	1,210,424	9%
2004	487,553	35%	573,110	41%	291,518	21%	54,901	4%	1,407,083	16%
2005	451,318	41%	402,785	37%	163,537	15%	83,742	8%	1,102,000	-22%
2006	555,984	40%	455,917	33%	227,361	16%	145,744	11%	1,384,000	26%
2007	776,792	57%	316,279	23%	195,189	14%	71,250	5%	1,359,000	-2%
2008	678,052	44%	516,103	34%	271,175	18%	74,237	5%	1,539,000	13%
2009	731,825	46%	571,063	36%	229,392	14%	51,987	3%	1,585,000	3%
2010	705,112	47%	510,649	34%	229,218	15%	54,983	4%	1,500,000	-5%
2011	479,243	34%	576,406	41%	230,051	17%	107,016	8%	1,393,000	-7%
2012	587,247	34%	663,527	39%	320,846	19%	141,901	8%	1,713,000	23%
2013	658,942	34%	744,536	39%	360,018	19%	159,225	8%	1,922,000	12%
2014	719,090	34%	812,496	39%	392,880	19%	173,759	8%	2,225,000	9%
2015	895,554	34%	1,063,223	40%	483,757	18%	191,062	7%	2,635,000	26%
2016	1,069,000	33%	1,357,000	42%	560,000	17%	220,000	7%	3,206,000	22%
2017	1,080,000	34%	1,343,000	42%	547,000	17%	217,000	7%	3,187,000	-1%
2018	1,490,000	46%	1,042,000	32%	350,000	11%	360,000	11%	3,242,000	2%
2019	1,627,000	46%	1,070,000	31%	411,000	12%	399,000	11%	3,506,000	8%
2020*	NA	NA	NA-	NA	NA	NA	NA	NA	875,000	-301%

Source. NCSI Annual Reports (2005-2020), Ministry of Commerce and Industry Annual Reports, Mansfeld and Winckler (2007), BMI (2017), The Ministry of National Economy (MONE) Annual Reports

(*) Due to the Pandemic Covid-19

4.6.4.2 International and Domestic Tourist Expenditures

The tourism sector has experienced a period of growth in terms of inbound and domestic expenditures. In 2001, the number of tourist arrivals was almost 1.1m, generating approximately OMR 77m (US$ 201m) of tourist receipts, as shown in the table below. A decade later, tourist arrivals surpassed 1.3m, around 21% above the year 2001. Tourist receipts amounted to almost OMR 159m (US$ 413m), accounting for 13% growth over the previous year. In 2015, the number of foreign tourists increased by 16%, and tourist receipts increased by 45% over the previous year as a result of building more hotels and resorts and developing natural attractions. These increases are mainly attributed to the introduction of the visa system for tourists and the development of tourism infrastructures. Eventually, in 2019, the number of foreign tourists increased by 8%, and tourist receipts grew by 1% over the previous year. Furthermore, with the strategy (NTS), foreign spending is forecast to grow by some 7.1% per annum up to 2025, with domestic spending to grow by around 3.9% (OBG, 2016).

Domestic tourism is as vital to the economy of developing countries as international tourism (McDowall & Choi, 2010). Morrison (2013a) states that domestic travel in several countries is what sustains the tourism sector and not international tourism. This is because domestic travel tends to be less seasonal than international travel; therefore, it contributes to a higher volume of tourism throughout the year. As a result, the government launched an up-market tourist campaign under the name '*Tourism Enriches*' Week (MOT, 2006), after the establishment of the MOT, to increase awareness among residents about the importance of tourism and promote domestic tourism. Domestic tourism dominated about 50% of the strategy (NST), particularly the recreational sector (TimesofOman, 2016). About 47% of total tourism expenditure comes from domestic tourism at OMR 608.7m (US$ 1.6bn), compared to OMR 684.7m (US$ 1.8bn), or 53%, from inbound tourism expenditure. The entire sector generated a value of OMR 1.29bn in 2019, which was a 42.8% increase over OMR 905.5m in 2011.

Table 4.10 Inbound and Domestic Tourism Expenditures

Year	Tourist Arrivals (OMR 000)	Growth Rate	Inbound Expenditures (OMR 000)	Growth Rate	Domestic Expenditures (OMR 000)	Growth Rate	Total Expenditure (OMR 000)	Growth Rate
2001	1,095	35%	77,401	-30.9%	NA	NA	NA	NA
2002	1,112	2%	91,862	19%	NA	NA	NA	NA
2003	1,210	8%	104,813	14%	NA	NA	NA	NA
2004	1,407	14%	145,786	39%	NA	NA	NA	NA
2005	1,102	-28%	127,663	-12%	291,554	NA	419,217	NA
2006	1,384	20%	146,876	15%	362,500	24%	509,376	22%
2007	1,359	-2%	167,654	14%	455,883	26%	623,537	22%
2008	1,539	12%	178,655	7%	637,434	40%	816,089	31%
2009	1,585	3%	144,367	-19%	628,539	-1%	772,906	-5%
2010	1,500	-6%	140,548	-3%	694,728	11%	835276	8%
2011	1,393	-8%	158,674	13%	746,900	8%	905,574	8%
2012	1,713	19%	200,270	26%	854,368	14%	1,054,638	16%
2013	1,922	11%	227,271	13%	893,295	5%	1,120,566	6%
2014	2,225	14%	250,913	10%	864,023	-3%	1,114,936	-1%
2015	2,635	16%	364,753	45%	863,747	0%	1,228,500	10%
2016	3,207	18%	427,341	17%	782,877	-9%	1,210,218	-1%
2017	3,179	-1%	532,264	25%	755,587	-3%	1,287,851	6%
2018	3,241	2%	679,175	28%	554,314	-27%	1,233,489	-4%
2019	3,506	8%	684,720	1%	608,700	10%	1,293,420	5%
2020*	875	-301%	244,592	-180%	NA	NA	NA	NA

Source. NCSI Annual Reports (2005-2020), Ministry of Commerce and Industry Annual Reports, Mansfeld and Winckler (2007), BMI (2017), Ministry of National Economy Annual Reports

(NA) data not available

(*) Due to the Pandemic Covid-19

4.6.4.3 Tourism Satellite Account (TSA)

In order to develop accurate and organized tourism statistics, the MOT, in collaboration with the UNWTO, conducted a project titled *Tourism Satellite Account*, which started in 2015 and ran for three years. The leading TSA indicators that were present were; *inbound and outbound tourism and their expenditures, tourism production, direct value, the share of tourism in the GDP, and finally, tourism balance*. Between 2005 and 2019, the number of inbound visits to the Sultanate increased by 68%. However, the number of outbound visits from the Sultanate increased by 60%, a higher proportion over the same period. Though Oman's plan seems to be working, with substantial industry revenues across the board, (NCSI) data shows a widening gap between local sector income and money spent abroad by Omani citizens and residents, with a balance of OMR 269.9m (US$ 689m) in favour of overseas spending posted in 2019. The sector added value to the GDP and it has been growing since 2005. The growth reached OMR 718m (US$ 1.8 bn) by the end of 2019, with the number of tourists exceeding 3.2m, compared to OMR 272m in 2005, with some visitors reaching around one million.

The share of the sector within the country's GDP substantially rose from 2.3% in 2000 to 2.5% in 2019. Although the sector has been improving its significance in the economy, its contribution to the GDP averaged less than 2.5% of the GDP. During the session at the Al-Shura Council, the Tourism Minister, HE Ahmed Al-Mahrazi, compared the weakness of the sector contribution to the GDP to the inaccurate statistics, which in the previous years focused only on the hotels and restaurants sector, but ignored the transport sector, the aviation sector, and car rentals. The Minister added that the prevailing national accounting system considers accommodations and restaurants as the only tourist activities and does not count travel agents, tourist guides, rental cars, handicraft centres, and diving centres as tourist activities (eTurboNews, 2012).

The total contribution to GDP is forecast to rise by 8.2 percent per annum to OMR 3.88bn (8.2% of GDP) by 2024 (Oman: 20/20 Vision, 2016). The WTTC predicts that direct contribution will continue to grow by roughly 6.1% per annum through to 2025, while indirect contributions will grow some 6.2% per annum. By 2025, this would give the sector a direct contribution of 3.3% towards the GDP and an indirect contribution of 7.3% (OBG, 2016). Nonetheless, WTTC figures also show that the sector, while growing quickly, is still below the regional and international average in terms of economic contribution, standing at 81st in the world in terms of the size of tourism's contribution, and seventh of the 10 Middle Eastern countries (OBG, 2016). Again, due to Covid-19, the inbound and outbound expenditure, as well as the sector's revenues, dramatically dropped, affecting the sector's contribution to the GDP.

Table 4.11 Tourism Satellite Account (TSA) Indicators

Year	Outbound Tourism		Inbound Tourism		Tourism Satellite Accounts (TSA)				
	Outbound Visitors (000)	Outbound Expenditure (OMR)	Inbound Visitors (000)	Inbound Expenditure (OMR 1000)	Tourism Production (000)	Intermediate Consumption (000)	Direct Value Added (000)	Share of Tourism GDP (%)	Tourism Balance (000)
2005	2,496	287,975	1,101	127,663	419,217	147,079	272,138	2.3	-160,312
2006	2,664	310,873	1,385	146,876	509,376	166,885	342,491	2.4	-163,997
2007	2,945	326,856	1,360	167,654	623,502	201,802	421,700	2.6	-159,202
2008	3,100	304,206	1,540	178,655	816,083	263,277	552,806	2.4	-125,551
2009	2,470	228,230	1,584	144,367	773,188	267,615	505,573	2.7	-83,863
2010	2,829	262,971	1,500	140,548	835,277	313,914	521,363	2.3	-122,423
2011	3,341	285,811	1,393	158,674	905,514	384,708	520,806	1.9	-127,197
2012	3,972	337,532	1,714	200,270	1,047,361	434,365	612,996	2.0	-137,262
2013	4,301	370,155	1,923	227,271	1,131,620	478,534	653,086	2.1	-142,884
2014	4,727	414,406	2,225	250,913	1,169,817	480,320	689,497	2.1	-163,493
2015	5,424	481,242	2,634	364,753	1,228,500	495,245	733,255	2.8	-121,303
2016	5,902	542,530	3,207	427,341	1,210,218	527,643	682,575	2.7	-121,250
2017	6,368	642,969	3,258	532,264	1,287,851	549,405	738,446	2.7	-119,034
2018	5,975	955,278	3,242	679,175	1,233,489	544,006	689,482	2.2	-289,595
2019	6,633	941,106	3,506	684,720	1,293,420	575,515	717,905	2.5	-269,897
2020*	1,657	319,925	875	244,592	853,132	275,068	578,068	2.3	-75,334

Source. NCSI Annual Reports (2005-2020)

(*) Due to the Pandemic Covid-19.

4.6.4.4 Challenges and Obstacles in Developing the Tourism Sector:

Oman's tourism sector has faced various challenges, which have hindered the cycle of development in the sector. The MONE addressed the challenges that might face the achievement of Vision 2020, which were the gradual decline of oil reserves, the weakness of interconnection between the oil sector and services sector, the increase in the size of the general budget deficit, and the weakness of the private sector and its limited role in the national economy (MONE, 1997). Also, Al-Masroori (2006, p. 153) ranked the challenges to the lack of market identification (image and branding internationally); lack of proper marketing and promotion schemes; lack of integration among sectors (overlapping in tasks and responsibilities); lack of infrastructure and necessary facilities; and lack of institutional coordination (weakness of the PPPs).

External forces such as the conflict in Yemen, Qatar–Saudi diplomatic conflict, and new competitive destinations should also affect tourism development and its economic contribution (OAB, 2016). The WEF (2015) called for improvements in areas that are traditionally strong points in the sector. The areas that required improvements are low quality of air transportation, insufficient number and quality of hotel rooms; lack of qualified workforce; low competitiveness in the prices of hotels; and complex procedures for issuing visas. The TANFEED (2017) report was critical of some challenges that hinder the tourism development process and make it slower. These challenges are 1) work environment and policies indicate long processes to get approvals and complications for new projects; 2) lack of development in existing locations and lack of innovation to attract tourists; 3) lack of marketing and promotional activities, 4) overlapping and duplication in activities among governmental bodies; and 5) the small number of Omanis who are interested in joining the sector, but face difficulties in operating tourism businesses.

4.6.4.5 Impact of Oil Price Crisis on Tourism Projects and Investments:

Mansfeld and Winckler (2007, p. 224) summarize that despite the rapid socio-economic progress which occurred in Oman during the 1970s, 1980s, and in the early 1990s, the Omani economy was still suffering from the three fundamental shortcomings: increasing dependence on oil income, low proven oil reserves, and structural unemployment. Figure 4.7 illustrates the relationship between the oil sector revenues and non-oil sectors, which depends on government spending, which in turn is dependent on oil revenues.

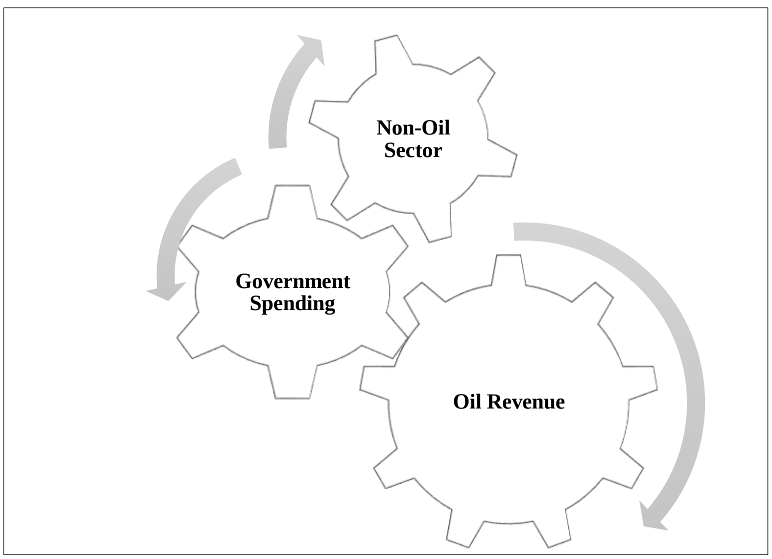

Figure 4.7 Relationship between Oil Revenue and Non-Oil industry
Source. Author

The drop in global oil prices has put significant pressure on Oman’s GDP expansion, resulting in inflation, underemployment, lack of economic activities, and investment. The country has experienced a budget deficit forcing the government to take critical action in an attempt to narrow the government’s budget deficit (see *Table 4.12*). The government unveiled austerity programs to achieve a balanced budget by cutting public expenditure and increasing public savings, slashing investment in infrastructure projects, cutting subsidies, and increasing tariffs (OmanObserver, 2018). As a result of these actions, many private companies (local and international) started downsizing and suspended bonuses, and some expatriates sent their families home to cut back on living costs (ALJAZEERA, 2016). Since then, property owners have slashed rents, and the government has delayed several infrastructure projects, including a planned rail network connecting the six GCC countries.

Table 4.12 Oman: Revenues, Expenditures, and Deficit

	2011	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**
Revenues	10.6bn	13.5bn	13.9bn	14.1bn	9.1bn	7.6bn	8.5bn	9.5bn	10.1bn	10.7bn
Expenditures	10.7bn	13.6bn	13.9bn	15.2bn	13.7bn	12.9bn	12.3bn	12.5bn	12.9bn	13.2bn
Deficit (OMR)	113m	80m	80m	1.1bn	4.6bn	5.3bn	3.8bn	3bn	2.8bn	2.5bn

Source. MOF (2020)

4.6.5 Tourism Investments and Projects

Local and international investments have become the government's top priorities and a common feature of Oman's economic plans. Hence, to promote and encourage more investments in the sector, some policies, incentives, and assistance programs have been added and amended after reviewing the requirements of the sector. The government has facilitated and supported new projects to stimulate foreign/regional investments by developing the required infrastructure services, providing lease incentives, and grants and loans for the construction and operation of tourist facilities such as accommodation, and entertainment recreation venues. Moreover, the current strategy (NTS) works on updating land development agreements, the system of ownership of properties by non-Omanis in integrated tourism complexes (ITC), and the alternatives available to the MOT to deal with investors involved in suspended or delayed projects or ITC projects whose owners are likely to withdraw (OmanObserver, 2015). According to the late and Ex-Oman's Tourism Minister, Rajha Abdul-Amir, foreign investors have given assurances to push on with tourism projects despite the global credit turmoil. All foreign investors who are building resorts or, planning to do so, have pledged to continue with their projects as these projects are essential in their contribution to the economy, and the government is committed to giving its support (ArabianBusiness, 2008).

A vast number of key projects aimed at achieving the country's ambitious goals are in various stages of development across Oman (DENTONS, 2018). Nevertheless, the sector's development has witnessed several projects and investments that, unfortunately, have turned to be fake or cannot be completed. In 2015, a press conference was held in Muscat, announcing a US$ 6bn project, *Oman Oasis*, by an Omani businessman (GulfNews, 2016b). The proposed project was to include both five and seven-star hotels, an international sports hospital, villas and chalets, a yacht's port, and a shopping mall. The project was supposed to be completed in six years. Later, Oman's Minister of Tourism revealed in front of members of Oman's Shura Council that the *Oman Oasis* did not exist. According to the Minister, the project was announced by the Omani national who owns a land project, and the MOT had nothing to do with it. "*After launching an investigation into the project, it turned out that the project is fake,*" he said (GulfNews, 2016b). An example of an unfinished mega tourism project is Al-Madina A'Zarqa (The Blue City), the country's significant urban economic development. The US$ 10bn project was expected to attract high levels of foreign direct investment and generate approximately 25,000 jobs and serve up to two million tourists a year (Talwar & Smith, 2007). On the fate of the Blue City, the Tourism Minister said that ASAAS Company is currently working on the project under the name Hai Al-Sharq (East Neighbourhood), and the work on recreational parks has begun. It involves the construction of a zoo, water park, and two hotels. The project is expected to be completed by the middle of 2021 (OmanObserver, 2019b).

4.7 SUMMARY

This chapter gives an overview of the Sultanate's tourism evolution and development within the country's development strategies (Vision 2020 and Vision 2040). It sheds light on the contribution of the sector to the GDP and the challenges faced by the sector development process.

In the next chapters, the collected data was analyzed and interpreted quantitatively (Chapters 5 and 6) and qualitatively (Chapter 7) concerning the research aims and the proposed conceptual framework.

CHAPTER FIVE: LOCAL COMMUNITY SURVEY DATA ANALYSIS & RESULTS

5.1 INTRODUCTION

The collected data were analyzed and briefly interpreted quantitatively and qualitatively concerning the research problem and the proposed conceptual framework. This chapter presents the results of the analysed data from the survey questionnaire: *the local community's satisfaction towards the development of the tourism sector in Oman*. The survey investigated the development of tourism from the local community's perspective through the dimensions: the role of destination management organization (DMO), destination planning and policies, destination marketing and promotion, tourist products and services, the development of destination products and services, and the state of tourism development. Also, the survey aimed to address the study objectives (1, 2, 3, and 4), see section 1.4, and the related research questions:

1. *To understand the contribution, impact, and evolution of the tourism sector related to the economic development of Oman.*
   - What are the impacts of the tourism sector on the development of the economy?
   - What are the procedures and practices the Omani government must adapt to introduce a cohesive and economically viable tourism sector that contributes to a more developed economy?
   - How have the destination resources been exploited in supporting Oman's economy?
2. *To examine the contradictions and challenges facing the development of the sector.*
   - How has Oman tourism responded to the competitive environment?
3. *To examine how different marketing methods can be used by both the private and the public sectors to attract a higher number of tourists and become a preferred tourist destination.*
   - What are the marketing strategies that the tourism sector has adopted to promote Oman regionally and internationally?
   - To what extent are the destination image and branding developed?
4. *To assess the practices, regulations, and prospects of tourism destination management, marketing, knowledge, and development by both the public and private sectors.*
   - To what extent does the Omani government control the tourism sector?

The primary variables of the questionnaire consisted of 51 questions and statements separated into 8 sections (see *Appendix I-A: Local Community*). For the measurement of the local community satisfaction, the obtained data was analysed by using SPSS (V.25). The analysis process was segmented into two stages. *Descriptive Analysis*, the first stage, was used to examine the local community's demographic characteristics and the overall satisfaction of the development of the sector. The second stage, *Factor Analysis*, was to identify the factors that determine the local community's satisfaction through employing *Exploratory Factor Analysis (EFA)* using *Principal Component Analysis (PCA)* with *Varimax Rotation* (see *section 3.4.1.2*).

5.2 DESCRIPTIVE RESULTS OF THE LOCAL COMMUNITY'S SATISFACTION VARIABLES

This section describes the relationships and differences of each variable based on the frequencies and percentages of respondents' responses. The descriptive statistic, such as means, standard deviations, and the percentage was examined to understand and synthesize a broader spectrum of the local community satisfaction. It should be noted that a higher score, for example, mean values represent a high satisfaction with the development of the tourism sector, while a lower rating suggests a lower level of satisfaction.

5.2.1 Demographic Profile of the Local Community

Based on the information given in responses to gender, age, nationality, professional background, and the respondent region/province, the results in Table 5.1 showed that a total of 790 respondents involved in this study, 60% were males, and 40% were females making the gender representation reasonably balanced. The second category of age group demographic characteristics distributes by 5 age-scales ranging from 21 years old to 60 years old and above. The majority of the respondents belongs to the age group 31-40 years old (44%), the second was 41-50 years (25%), the third was 21-30 years old (23%), the fourth was 51-60 years old (6%), and only 1.4% were 60 and above. The respondents were fairly and normally distributed within all age groups. Markedly, for the research purpose, respondents younger than age 21 were automatically excluded. In terms of nationality, the most responses in the survey came from those with Omani nationality (about 65% of the total respondents), while the rest (35%) representing ex-pat residents came from different nationalities, such as India (10%), UK (around 4%) and others (22%). The results reflect the current percentage of foreigners in the total population, 30-40% (NCSI, 2020).

In terms of respondents' employment status, it was found that about 72% of the respondents work in the government and private companies, while 16% of them were students. Other occupations, such as business people, freelancers, or jobseekers, presented 10% of the respondents, and the retired people only 2%. The results were reflected in the people's type of employment; 67% of the respondents were engaged in non-tourism related business either in government or private sector or self-employment, where 19% might be involved. This might confirm that the sector is still new, and many local members still have doubts about joining the sector. However, the remaining percentage was related directly or indirectly to the tourism sector.

Moreover, the geographical distribution of respondents was reported in Table 5.1. Oman is divided into eleven destination regions and provinces (see *Figure 5.1*) according to the government's administrative distribution. The majority of respondents were Dhofar residents (42%), followed by Muscat as the second most common state of residence, approximately 27% of the sample. Residents, who participated from Ad Dakhiliyah, Musandam, Al Batinah, Al Wusta, and others comprise about 31% of the sample. However, the response rate was not reflective of the actual population distribution. This was due to people's willingness to participate.

Table 5.1 Profile of the Local Omani Community Demographics

Demographic Characteristics	Total Frequency (N = 790)	Percentage (%)
Gender		
Male	474	60
Female	316	40
Age Group		
21-30	184	23.3
31-40	348	44.1
41-50	198	25.1
51-60	49	6.2
Over 60	11	1.4
Nationality:		
Oman	515	65.2
India	75	9.5
United Kingdom (UK)	29	3.7
Others	171	21.6
Employment Status (Occupation)		
Employed (Public sector/Private sector)	570	72.2
Retired	17	2.2
Student (Diploma, BA/BS/, MA/MSc, PhD)	123	15.6
Other	80	10.1
Employment/Study Status Relates to Tourism		
Yes, it is related	99	12.5
No, it is not related	529	67.0
Might be, somehow	148	18.7
Unsure	14	1.8
Province/Region of Residence		
Ad Dakhiliyah	46	5.8
Ad Dhahirah	27	3.4
Al Batinah North	60	7.6
Al Batinah South	45	5.7
Al Buraimi	10	1.3
Al Wusta	10	1.3

Demographic Characteristics	Total Frequency (N = 790)	Percentage (%)
Ash Sharqiyah North	27	3.4
Ash Sharqiyah South	19	2.4
Dhofar	335	42.4
Muscat	209	26.5
Musandam	2	.3

Source: Local Community's Survey

Note: some percentages are rounded up to the nearest unit.

Figure 5.1 Oman Governorates Map

Source. https://images.app.goo.gl/LQ9JLwPt9q45T9gS9

5.2.2 Local Community Overall Satisfaction on the Development of the Tourism Sector

Consistent with the research objectives and questions in section 5.1, this sub-section presents the local community's overall views on the tourism sector's strengths and weaknesses, challenges, and negative perceptions facing the sector and the sector's future focus actions and improvements. A 5-point or a 6-point Likert-type rate scale was assigned to each question, and no respondents ticked more than one.

Regarding the causes that hinder/impede the development of the tourism sector, the respondents were given the choice of six causes. The results in Table 5.2 showed that around 23% of the respondents found the complications of policies and procedures set by the government the greatest hindrance to the development of the sector, while the lack of resources: HR, finance, and technology was the least by only 7%. More than 21% of the respondents saw centralization in decision-making by government bodies as the second significant cause that limits the development of ethical, sustainable tourism. The lack of partnership between the public and private sectors as well as the lack of designing, monitoring, and developing programs for government tourism projects were the third to hinder the development of the sector (15%). This was followed by the fourth hindrance, which was the lack of conducting studies on developing and presenting the overall distinctive ethos of tourism in Oman (12%). These obstacles, if not tackled from the beginning by the government and addressed in the country development strategy, may cause severe problems to the sector development process.

Table 5.2 Causes that hinder the development of the tourism sector

Which of the following impedes the development of the tourism sector?	*Frequency*	*Percent*
The lack of conducting studies on developing and presenting the overall distinctive ethos of tourism in Oman.	93	11.8
The lack of designing, monitoring, and developing programs for government tourism projects.	121	15.3
The lack of partnership between the public and private sectors.	121	15.3
Centralization in decision making by government bodies, which limits the development of ethical, sustainable tourism.	165	20.9
The complications of policies and procedures set by the Omani government.	180	22.8
Lack of resources; HR, finance, and technology.	54	6.8
Others	56	7.1
Total	790	100

Table 5.3 illustrated the respondents' choices to indicate a point of strength in the development of the tourism sector. The highest number of respondents, about 34%, chose natural attractions as a vital element in the development process of the sector. This confirms the importance of the Sultanate's endowment of natural resources. Strong government support was the second strength element by (22%). Destination services and facilities, as well as historical sites, were seen as the third point of strength in the sector. Finally, focusing on the cruise ship industry and creating more tourism attractions (human-made) scored the lowest choices among the respondents, 7.2% and 7.5%, respectively. For the benefit of the sector, the government, in collaboration with other stakeholders, should focus more on these strengths by supporting them financially and hiring a highly qualified and competent workforce.

Table 5.3 Strengths of the development of the tourism sector

Which of the following is a point of strength in the development of the tourism sector?	*Frequency*	*Percent*
Strong government support for the development of the sector and its supporting infrastructure.	177	22.4
Accommodation, transportation, and other facilities.	96	12.2
Natural attractions, such as landscape, wildlife, and flora.	271	34.3
A wealth of historical sites, which provides a reasonable basis for tourism expansion.	94	11.9
Focusing on the cruise ship industry, which presents related opportunities for local tour operators and hotel chains.	59	7.5
Creating more tourism attractions (human-made).	57	7.2
Others	36	4.6
Total	790	100

As with the previous table, respondents were asked to indicate a point of weaknesses in the development of the tourism sector. Table 5.4 showed that 34% of the respondents believed that the level of service quality provided within the sector is the weakest link in the development of the sector. Marketing and Promotion came as the second weakest by 15%. This was followed by the slump in oil prices and the Gulf Crisis (the Qatar–Saudi Arabia diplomatic conflict) (13%), the over-reliant on domestic tourism to support the industry (12), and few direct air connections from countries outside the Gulf (11%), respectively. The strongest of the sector development process, according to 9% of the respondents, was the competition from neighbouring countries in the region. These weaknesses hinder the sector in the future if no action is taken by the government.

Table 5.4 Weaknesses in the development of the tourism sector

Which of the following is a point of weaknesses in the development of the tourism sector?	*Frequency*	*Percent*
Few direct air connections from countries outside the Gulf.	86	10.9
The level of service quality provided within the sector.	271	34.3
Slightly over-reliant on domestic tourism to support the industry.	94	11.9
The slump in oil prices and the Gulf Crisis.	104	13.2
Competition from other destinations within the Gulf (the Qatar–Saudi Arabia diplomatic conflict).	74	9.4
Marketing and Promotion.	121	15.3
Others	40	5.1
Total	790	100

Respondents were asked to state the most challenging obstacle that the Omani government, particularly the Ministry of Tourism, should overcome to improve and develop the sector. Table 5.5 showed that 26% of the respondents saw bureaucracy in decision-making (Centralization) as being the most challenging task to the sector. Other challenging obstacles were: lack of funds and investments (22%), unclear planning and policies (21%), and the lack of experience (19%). Unifying resources was not an obstacle to overcome, according to 8% of the respondents. Again, the process to overcome these challenges (obstacles) requires collaboration between the sector stakeholders and the provision of funds and qualified human resources.

Table 5.5 Challenging obstacles to improve and develop the sector

Which of the following is the most challenging obstacle that the Omani government (especially the Ministry of Tourism) should overcome to improve and develop the sector?	*Frequency*	*Percent*
Unclear planning and policies.	163	20.6
Bureaucracy in decision making (Centralization).	208	26.3
Lack of funds and investments.	172	21.8
Lack of experience.	151	19.1
Unifying resources.	62	7.8
Others.	34	4.3
Total	790	100

The respondents were asked to indicate the element that has the highest negative impact on attracting visitors to Oman. Table 5.6 showed that nearly 25% of the respondents found the lack of distribution of services in many areas in Oman as having negative impact. Other negative impacts were: lack of entertainment activities, lack of the availability of information centres, lack of the availability of basic utilities, and the lack of catering services. These have all shown the need for more attention and immediate actions from the government.

Table 5.6 Negative impacts on attracting visitors to Oman

Which of the following has the largest negative impact on attracting visitors to Oman?	*Frequency*	*Percent*
Lack of the availability of telecommunication services (Internet, phone signals)	51	6.5
Lack of the availability of information centres	121	15.3
Lack of the quality of catering services (restaurants and cafes)	86	10.9
Lack of the distribution of the services in many areas in Oman.	196	24.8
Lack of the availability of basic utilities (water, electricity)	98	12.4
Lack of entertainment activities in many areas in Oman.	149	18.9
Lack of transport services (roads and signs).	40	5.1
Others	49	6.2
Total	790	100

Table 5.7 illustrates the main elements for being able to achieve proper development in the tourism sector. About 35% of the respondents found creating more entertainment projects (e.g., shopping malls, theme parks, water parks) with relatively equal distribution around the country as the main element for achieving proper development in the tourism sector. Supporting SMEs in the tourism sector was the second element in the development process, according to 23% of the respondents. This was followed by other elements such as having more control over the negative practices of many visitors (14%), developing historical places around the country (12%), having more hotels and resorts (9%), respectively.

Table 5.7 Elements for having proper development in the tourism sector

To have proper development within the tourism sector, there must be a focus on the following:	*Frequency*	*Percent*
Creating more entertainment projects distribution around the country.	280	35.4
Supporting SMEs in the tourism sector.	183	23.2
Having more control over the negative practices of many visitors.	112	14.2
Having more hotels and resorts.	68	8.6
Developing historical places around the country.	91	11.5
Others	56	7.1
Total	790	100

The final question in this sub-section is about the local community's overall satisfaction with Oman's level of tourism development. Table 5.8 showed that more than 50% of the respondents were dissatisfied, while about 27% were satisfied with the sector's need for progress. About 19% of the respondents were unsure. The mean rating of the local community’s overall satisfaction (M = 2.54), with a standard deviation (SD = 1.12), showed the responses were consistent, and data deviated somewhat from the mean. It can be generalized that the local community members who participated in the study were fairly dissatisfied with the Sultanate’s tourism development. Generally speaking, this negative satisfaction reflects the performance of destination management and marketing, which is essential, especially in the local community, influenced by the sector's development.

Table 5.8 Level of Satisfaction in Tourism Development in Oman

To what extent are you satisfied with the level of tourism development in Oman?	*Frequency*	*Percent*
Very Satisfied	12	1.5
Satisfied, with the need for progress	202	25.6
Unsure	147	18.6
Dissatisfied	270	34.2
Very Dissatisfied, nothing has changed	159	20.1
Do Not Know	0	0
Total	790	100
Mean	2.54	
Standard Deviation	1.120	

5.3 FACTOR ANALYSIS OF THE LOCAL COMMUNITY'S VARIABLES

This section aims to identify the factors that determine the local community's satisfaction towards the development of the tourism sector in Oman. Factor Analysis is used to reduce the number of items (statements) into a manageable number of factors that represent the underlying relationship among them. Exploratory Factor Analysis (EFA) was performed on destination attributes to investigate the local community's satisfaction towards the development of the tourism sector in Oman. Bartlett's test of sphericity (with a value, $p < .05$) and a calculated Kaiser-Meyer-Olkin (KMO) statistic of above 0.50 (which could be described as "accepted") which indicated that data seems suitable for factor analysis. Principal component analysis (PCA) with eigenvalues of 1.0 or higher was rotated by the varimax (orthogonal) rotation so that the components obtained would be independent of each other.

5.3.1 Local Community's Satisfaction Factors

After performing the Principal Component Analysis (PCA) with Varimax Rotation, the 38 statements of the local community's satisfaction with the development of the tourism sector were extracted to a ten-factor structure, as illustrated in Table 5.10. The ten-factors explained 56.24% of the total variance. The KMO, measure of sampling adequacy, has shown that the sample data was large enough to perform factor analysis (KMO = 0.836) exceeded the accepted index of 0.5. Also, the Bartlett test ($p < .000$) was highly significant, and therefore factor analysis was appropriate. As illustrated in Figure 5.2, the eigenvalue of the ten-component factors was acceptable and valid, higher than 1.0. The plot seems to have two inflexion points: one at eigenvalue 3 and the other at eigenvalue 11. The study chooses to keep the factors corresponding to eigenvalues to the left of eigenvalue 11, i.e., the 10 largest eigenvalues (56.24% of the variance).

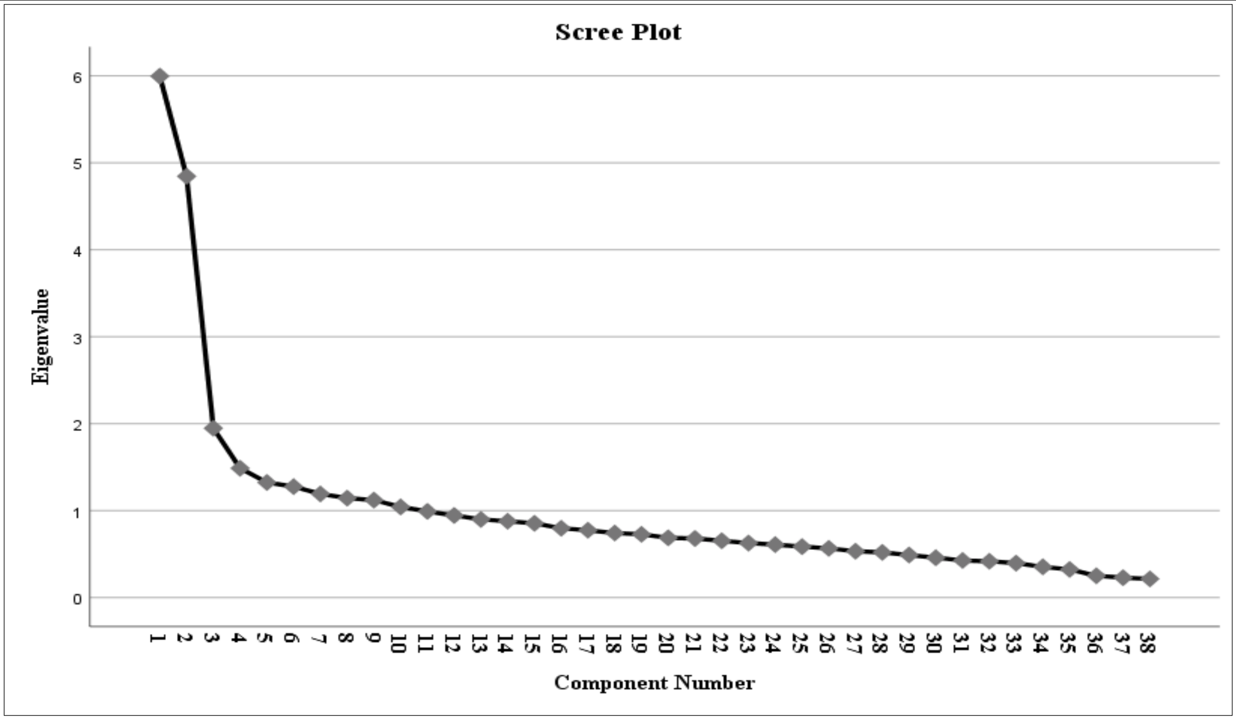

Figure 5.2 Scree Plot: Generated Factor of the Local Community's Survey
Source. Local Community's Survey

In Table 5.9, Factor 1, before rotation, accounted for considerably more variance than the remaining nine factors (15.78%). However, after extraction, Factor 1 accounts for only 13.39% of variance compared to the remaining nine factors' high variance. The loading and percentage overlapping variance of a total of 38 statements were reduced into a manageable number of factors (loadings of greater than 0.3). The reasons were to decrease the probability of misclassification and to simplify the reading of the rotated component matrix.

Table 5.9 Factor Analysis (the Local Community): Total Variance Explained

Total Variance Explained									
Component	**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	5.996	15.780	15.780	5.996	15.780	15.780	5.090	13.393	13.393
2	4.844	12.748	28.528	4.844	12.748	28.528	2.383	6.272	19.666
3	1.948	5.125	33.653	1.948	5.125	33.653	2.382	6.269	25.935
4	1.487	3.913	37.566	1.487	3.913	37.566	2.134	5.617	31.551
5	1.324	3.484	41.050	1.324	3.484	41.050	2.075	5.461	37.013
6	1.276	3.357	44.407	1.276	3.357	44.407	1.580	4.157	41.169
7	1.192	3.136	47.543	1.192	3.136	47.543	1.575	4.143	45.313
8	1.144	3.010	50.554	1.144	3.010	50.554	1.432	3.769	49.082
9	1.121	2.951	53.504	1.121	2.951	53.504	1.405	3.696	52.779
10	1.043	2.744	56.248	1.043	2.744	56.248	1.318	3.469	56.248
Extraction Method: Principal Component Analysis.									

Source. Local Community's Survey

Factor 1: "*Development of Tourism Destination (Tourist) Infrastructure and Resources*" explained 15.78% of the total variance. It includes 9 statements considered moderate statements (loading of above 0.5), which call for the destination to develop its resources (natural, historical, and cultural) attractively and interestingly so as to attract visitors and draw their attention. These statements are related to the local community's concerns over the development of the destination's transportation sector, high-quality public services, MICE tourism, accommodation, and sports activities. Other statements considered developing natural resources and cultural- heritage attractions were included, as well as statements about the access procedures, safety and security programs and other supporting services.

Factor 2, *"The Focus of the Tourism Sector: Strategy and Competitiveness,"* explained 12.74% of the total variance. Six statements (loading larger than 0.4) were about maximizing visitor numbers with less attention to their expenditures, showing the sector rate of change compared to other destinations in the GCC, and adopting a new strategy to replace the selective tourist strategy to increase the GDP. In addition to tourism promotion methods and marketing schemes that represent Oman tourism resources and the development of the accommodation sector to other attractions.

Factor 3: *"Tourism Governance, and Uniqueness, and Attractiveness of Tourist Products and Services"* explained 5.12% of the total variance. In terms of loadings, statements (loading greater than 0.4) considered tourism policies and regulations to mitigate the negative impacts of tourism, and to encourage private sector investments. In addition to the position of tourist products and services compared to other destinations, the role of festivals, exhibitions, and summer packages to attract more visitors, and finally the evolution of the tourism products and services to cope with visitors' needs and desires.

Factor 4: *"Tourism Projects and Investments and Employment Opportunities,"* explained 3.91% of the total variance. Three statements (loading above 0.5) were related to the employment opportunities in the tourism sector compared to other services sectors, the sector's contribution to Oman's economy through investments and infrastructure projects, and the impact of tourism investments in the community social life.

Factor 5: "*Destination Development Strategy: The National Tourism Strategy (NTS)*" includes 3 statements (loading above 0.4) that explained 3.48% of the total variance. These statements are related to local community knowledge about the current development strategy, Vision 2040 and if it can be achievable compared to Vision 2020? Also, if the strategy can be reflected through the projects and investments in the tourism sector and if the tourism products and services have met the local community needs in terms of diversification, availability, accessibility, and suitability.

Factor 6: *"The Collaboration between the Government and Tourism Businesses"* explained 3.35% of the total variance. The factor statements (loading above 0.3) considered the role of the private sector in replacing the Omani government to control the development of the sector. Also, it was related to the encouragement of the SMEs to establish projects within the sector, and the improvement of the country's infrastructures and facilities (e.g., roads, telecommunications, utilities)

Factor 7: "*Exploitation of Destination Resources"* includes 3 statements (loading greater than 0.5) and explained 3.13% of the total variance. The statements were if: tourism projects and activities are based on and related to the community's attitude and needs, the sector has shown an increase in qualified and competent Omanis in both the public and private sectors, and finally, Oman's tourism resources (natural and human-made) have been exploited and protected from the negative impacts.

Factor 8: "*Availability and Variety of Tourist Products and Services"* explained 3.01% of the total variance and composed of 2 statements (loading greater than 0.5) regarding 1) Sultanate offers a wide range of tourism attractions and activities for the local community members to engage and 2) tourism mega-projects reflect the Sultanate's selective tourist strategy.

Factor 9: *"Destination Marketing Activities and Promotional Methods*" explained 2.95% of the total variance, including the statements (loading greater than 0.6) regarding if: the Omani government and tourism businesses promotional campaigns are more likely to focus on attracting international tourists rather than domestic ones, and Oman has reached the recognized global level as other GCC countries.

Factor 10: "*Tourism's Economic Impact versus the Environment and Society*" explained 2.74% of the total variance and referred to 2 statements (loading above 0.3). These statements were concerned with whether the government's efforts and initiatives in developing the tourism sector are well-recognized by the local community, as well as whether the tourism economic goals are more important than the negative impacts on the environment and community culture.

The results showed that the strongest satisfaction factor for developing was the development of the destination (tourist) infrastructure and resources (M = 3.79), while the destination development Strategy (M = 2.69) was the weakest factor. Furthermore, all 10 factors, mean and standard deviation scores were: M = 3.19, SD = 1.06. Using the standard deviation empirical rule (68-95-99.7), 95% of overall mean scores are spread out between 2.13 to 4.26, meaning that 14% of the local community valued the ten-factors of satisfaction above the mean between 3.19 to 4.26 and another 14% valued below the mean scores, between 2.13 to 3.19 with two standard deviations. This notion reflects that the local community satisfaction is also influenced by the factors mentioned above. The overall factors were within the range between "Disagree and Agreed."

Furthermore, the reliability analysis was conducted for the ten-factors and resulted between 0.191 and 0.886. The acceptance level of the reliability coefficient was above 0.60, which was acceptable for the first five-factors 1, 2, 3, 4, and 5. As shown in Table 5.10, the alpha coefficient for all statements, ranged as; 0.886 (Factor 1 = 9 items), 0.692 (Factor 2 = 6 items), 0.667 (Factor 3 = 5 items), 0.664 (Factor 4 = 3 items), and 0.6634 (Factor 5 = 3 items). The remaining factors 6, 7, 8, 9, and 10 showed that the alpha was below 0.6, which is generally unacceptable.

Table 5.10 Results Factor Analysis of the Local Omani Community's Satisfaction

Satisfaction Factors and Items	Factors Loadings									
	1	2	3	4	5	6	7	8	9	10
Factor 1: Development of Destination (Tourist) Infrastructure and Resources										
6.1 Developing natural resources (e.g., deserts, beaches, springs, caves.)	0.754									
6.3 Developing visitor-supporting services (e.g., restaurant, shopping malls, cafes.)	0.747									
6.2 Developing cultural and historical attraction (e.g., forts and castles, arts, museums, traditional cultural.)	0.736									
6.9 Developing the country's infrastructure and superstructure through high-quality public services (utilities, telecommunication.)	0.733									
6.8 Developing the transportation sector by having more flights, connecting with more destinations, strong road connections in the country.	0.726									
6.5 Developing sports activities (hiking, football matches, sailing, fishing.)	0.714									
6.4 Developing Business and convention events (e.g., festivals, exhibitions.)	0.704									
6.6 Developing access procedures (e.g., visas), safety and security programs (e.g., preventing robbery, bribes.)	0.676									
6.7 Developing accommodation sectors by building more hotels, resorts, hotel apartments.	0.595									
Factor 2: The Focus of the Tourism Sector: Strategy, and Competitiveness										
3.3 The tourism sector needs a new strategy replacing the current selective tourists (wealthy travellers) strategy to increase the tourism contribution in the Gross Domestic Product (GDP).		0.617								
4.4 Marketing and promotion schemes do not reflect the destination activities and attractions.		0.652								
4.3 Tourism promotions and advertising methods, such as participating in international exhibitions, are not enough to represent Oman tourism resources.		0.573								
2.5 Most tourism projects and investments are mainly focused on developing accommodation (hotels and resorts) and giving less attention to other attractions (theme parks, festivals, natural sites.)		0.553								
2.6 The emphasis of tourism in Oman has been upon maximizing visitor numbers with less attention to their expenditures.		0.521								
7.1 Oman's tourism sector has shown a slow, cumbersome, and incapable rate of change compared to other destinations in the GCC.		0.407								

Factor 3: Tourism Governance and the Uniqueness, and Attractiveness of the Tourist Products and Services						
3.5 Tourism policies and regulations mitigate the negative impacts of tourism, such as the unethical behaviour and practices from locals and visitors.			0.650			
3.4 Tourism policies and regulations have encouraged private sector investments by providing incentives and benefits.			0.630			
5.3 Events and programs (such as festivals, exhibitions, and summer packages) have been successful in attracting more visitors during the off-season autumn.			0.580			
5.2 Oman tourism products and services have a unique and robust position compared to other destinations such as the UAE and Qatar.			0.539			
5.4 The current tourism products and services have evolved regularly to cope with visitors' needs and wants.			0.421			
Factor 4: Tourism Projects and Investments and Employment Opportunities						
7.3 The tourism sector has contributed greatly to Oman's economy through investments and infrastructure projects.				0.773		
7.2 Employment opportunities have shown an increase in the tourism sector compared to other service sectors such as commerce, health and education.				0.696		
7.4 Tourism investments have caused changes in the community social life.				0.594		
Factor 5: Destination Development Strategy: The National Tourism Strategy (NTS)						
3.1 The national tourism strategy (NTS) is well known among the local community and can be achievable compared to the previous Vision 2020.					0.705	
3.2 The national tourism strategy has been reflected clearly through the projects and investments in the tourism sector.					0.686	
5.1 Oman tourism products and services have met the local community (domestic tourist) needs in terms of diversification, availability, accessibility and suitability.					0.469	
Factor 6: The Collaboration between the Government and Tourism Businesses						
7.5 The development of the tourism sector has encouraged many small, medium enterprises (SMEs) to establish projects within the sector.						0.685
7.6 Tourism projects and investments have improved the country's infrastructures and facilities (e.g., roads, telecommunications, utilities.)						0.685
2.1 The development of the tourism sector should be fully controlled and privatized replacing the Omani government.						-0.365

Factor 7: Exploitation of Destination Resources										
2.3 The tourism sector has shown an increase in qualified and competent Omanis in both the public and private sectors.							0.664			
2.2 Tourism projects and activities are based on and related to the community attitudes and needs.							0.607			
2.4 Oman's tourism resources (natural and human-made) have been exploited and protected from negative impacts.							0.533			
Factor 8: Availability and Variety of Tourism Products and Services										
5.6 Tourism mega projects, public services, luxury hotels, and resorts reflect the Sultanate's selective strategy, which seeks wealthy travellers.								0.741		
5.5 Oman, as a domestic destination, offers a wide range of tourism attractions and activities in which the local community members are able to engage.								0.559		
Factor 9: Destination Marketing Activities and Promotional Methods										
4.2 Government authorities and tourism businesses promotional campaigns are more likely focusing on attracting international tourists rather than domestic ones.									0.642	
4.1 As a tourism destination, Oman has reached the recognized global level as other GCC countries (UAE, Qatar).									0.612	
Factor 10: Tourism's Economic Impact versus the Environment and Society										
2.8 The government considers that tourism's economic goals are more important than the negative impacts on the environment and community culture.										0.688
2.7 The Omani government's efforts and initiatives in developing the tourism sector are well recognized by the local community.										0.352
Mean (M)	3.79	3.68	2.90	2.88	2.69	3.20	3.25	3.12	3.45	2.97
Standard Deviation (SD)	1.20	1.19	1.29	1.28	1.27	1.24	1.16	1.27	1.25	1.23
Eigenvalues	5.99	4.84	1.94	1.48	1.32	1.27	1.92	1.14	1.12	1.04
Variance (%)	15.78	12.74	5.12	3.91	3.48	3.35	3.13	3.01	2.95	2.74
Cumulative Variance (%)	15.78	28.52	33.65	37.56	41.05	44.40	47.54	50.55	53.50	56.24
Reliability Alpha	0.886	0.692	0.667	0.664	0.634	0.191	0.429	0.449	0.396	0.385
Number of Statements (total 38)	9	6	5	3	3	3	3	2	2	2

Note: A 5-point Likert-type scale: 1 = "Strongly Disagree" and 5 = "Strongly Agree

Source. Local Community's Survey

5.3.2 Local Community's Satisfaction Factors: Analysis of Independence Relationships

The Chi-Square test was undertaken to identify the relationship and the significant differences in satisfaction levels between the demographic variable, the nationality of the local community, and the generated factors from factor analysis with a 0.05 level of the significance covering the dimensions: the role of DMO, destination planning and policies, destination marketing and promotion, tourist products and services, development of destination products and services, and the state of tourism development.

5.3.2.1 Development of Destination (Tourist) Infrastructure and Resources and the Local Community's Nationality

Concerning the relationship between the variables: the development of destination (tourist) infrastructure and resources, and the local community nationality, nine statements were presented and developed covering the following areas; *quality and variety, prices, availability and accessibility, tourism activities, unique and different, destination exhibitions, and festivals, and events*. As illustrated in Table 5.11, approximately 44% of Omani participants indicated that it was essential to develop natural resources, statement 6.1 with (M = 3.71, SD = 1.30). However, a high priority was given to the development of natural resources in the sector's development process. Developing the country's infrastructure and superstructure are essential before moving to the development of natural resources. The results revealed that most of the participants were Omanis, and they were not satisfied with the development of the destination (tourist) infrastructure and resources. The statement, 6.2; just 47% of the Omani participants indicated an essential development was to develop cultural and historical attractions. The results showed that 46.3% of the Omanis, the majority of the total participants, deemed an essential development on visitor-supporting services, statement 6.3. The largest group (45.1%) of participants, who were Omanis, assured an essential development was related to business and convention events, statement 6.4. About 16% of the Omani participants gave developing sports activities as an essential to statement 6.5. Also, 46.3% of the Omani participants gave essential to the statement, 6.6, developing access procedures, safety, and security programs. 44.4%, the majority of the Omani participants gave an essential development to the statement, 6.7, developing accommodation sectors through building more hotels, resorts, hotel apartments). Approximately 48%, the majority of the Omani participants gave an essential to the statement 6.8 (M = 3.89, SD = 1.21), developing the transportation sector, which is one of the local community vital infrastructure in the destination with a focus on more flights, connecting with more destinations, and strong road connections. 45.5% of the participants, who were Omanis, gave an essential to the statement, 6.9 developing the country's infrastructure and superstructure through high-quality public services.

Furthermore, the overall mean and standard deviation scores of all nine statements were: M = 3.79, SD = 2.59. About 95% of respondents considered the development of the country's infrastructure and resources scores between 2.59 and 4.99. Another 14% of respondents valued below 2.59 and above 4.99 with two standard deviations. This view does reflect the development of the sector infrastructure and services (facilities), and influence the local community's satisfaction. The overall statements were within the range between "High Priority and Essential."

Regarding the p-values of the 9 statements, the results showed less than the significance level of 0.05, except in statement 6.1. However, the other statements showed sufficient evidence that there is a dependence relationship between the demographic variable, nationality, and development of destination (tourist) infrastructure and resources.

Table 5.11 Relationship between Development of Destination (Tourist) Infrastructure and Resources and Local Community's Nationality

Statements			**Local Community by Nationality**		**Total**
			Omani	**Expats: Non-Omani**	
6.1 Developing natural resources (e.g., deserts, beaches, springs, caves)	Essential	Respondents	**345**	159	504
		%	**43.70%**	20.10%	63.80%
	Medium Priority	Respondents	134	96	230
		%	17%	12.10%	29.10%
	Not a priority	Respondents	32	17	49
		%	4.1%	2.2%	6.2%
	Do Not Know	Respondents	4	3	7
		%	0.5%	0.4%	0.9%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	9.220a	5	**0.101**	0.108	10.107
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 2.44.					
6.2 Developing cultural and historical attractions (e.g., forts and castles, arts, museums, traditional cultural)	Essential	Respondents	**371**	173	544
		%	47%	21.90%	68.90%
	Medium Priority	Respondents	113	86	199
		%	14.30%	10.90%	25%
	Not a priority	Respondents	29	13	42
		%	3.7%	1.6%	5.3%
	Do Not Know	Respondents	2	3	5
		%	0.3%	0.4%	0.6%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	17.064a	5	**0.004**	0.147	0.145
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 1.74.					
6.3 Developing visitor-supporting services (e.g., hotels, resorts, restaurant, shopping malls)	Essential	Respondents	**366**	159	525
		%	**46.30%**	20.10%	66.40%
	Medium Priority	Respondents	124	100	224
		%	15.70%	12.70%	28.40%
	Not a priority	Respondents	22	15	37
		%	2.8%	1.9%	4.7%
	Do Not Know	Respondents	3	1	4
		%	0.4%	0.1%	0.5%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%

Statements			Local Community by Nationality: Omani	Local Community by Nationality: Expats: Non-Omani	Total
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	32.567a	5	**0.000**	0.203	0.199
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 1.39.					
6.4 Developing business and convention events (e.g., festivals, exhibitions)	Essential	Respondents	**356**	150	506
		%	**45.10%**	19.00%	64.10%
	Medium Priority	Respondents	139	109	248
		%	17.60%	13.80%	31.40%
	Not a priority	Respondents	20	13	33
		%	2.5%	1.6%	4.2%
	Do Not Know	Respondents	0	3	3
		%	0.0%	0.4%	0.4%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	36.401a	5	**0.000**	0.215	0.210
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 1.04.					
6.5 Developing sports activities (e.g., hiking, football matches, sailing, fishing)	Essential	Respondents	**366**	146	512
		%	**46.30%**	18.40%	64.70%
	Medium Priority	Respondents	122	102	224
		%	15.50%	12.90%	28.40%
	Not a priority	Respondents	27	21	48
		%	3.4%	2.7%	6.1%
	Do Not Know	Respondents	0	6	6
		%	0.0%	0.8%	0.8%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	49.319a	5	**0.000**	0.250	0.242
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 2.09.					
6.6 Developing access procedures (e.g., visas), safety and security programs (e.g., preventing robbery, bribes).	Essential	Respondents	**317**	137	454
		%	**46.30%**	21.90%	68.20%
	Medium Priority	Respondents	126	87	213
		%	15.90%	11.00%	26.90%
	Not a priority	Respondents	20	12	32
		%	2.5%	1.5%	4.1%
	Do Not Know	Respondents	3	3	6
		%	0.4%	0.4%	0.8%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	17.830a	5	**0.003**	0.150	0.149
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 2.09.					
6.7 Developing accommodation sectors through building more hotels, resorts, hotel apartments)	Essential	Respondents	**351**	163	514
		%	**44.40%**	20.70%	65.10%
	Medium Priority	Respondents	145	95	240
		%	18.40%	12%	30.40%
	Not a priority	Respondents	19	16	35
		%	2.4%	2.0%	4.4%
	Do Not Know	Respondents	0	1	1
		%	0.0%	0.1%	0.1%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	16.674a	5	**0.005**	0.145	0.144
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is .35.					
6.8 Developing the transportation sector by having more flights, connections with more destinations, and strong road connections in the country.	Essential	Respondents	**377**	181	558
		%	**47.80%**	23.00%	70.80%
	Medium Priority	Respondents	109	78	187
		%	13.80%	9.80%	23.60%
	Not a priority	Respondents	28	14	42
		%	3.5%	1.8%	5.3%
	Do Not Know	Respondents	1	2	3
		%	0.1%	0.3%	0.4%

Statements			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	Value	df	Asymptotic Significance	Phi	Contingency Coefficient
	18.569a	5	**0.002**	0.153	0.152
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 1.04.					
6.9 Developing the country's infrastructure and superstructure through high-quality public services (utilities, telecommunication)	Essential	Respondents	**360**	170	530
		%	**45.50%**	21.50%	67.00%
	Medium Priority	Respondents	136	96	232
		%	17.20%	12.20%	29.40%
	Not a priority	Respondents	18	7	25
		%	2.3%	0.9%	3.2%
	Do Not Know	Respondents	1	2	3
		%	0.1%	0.3%	0.4%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	Value	df	Asymptotic Significance	Phi	Contingency Coefficient
	25.865a	5	**0.000**	0.181	0.178
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 1.04.					

Note: a 5-point Likert-type scale: 5 = Essential, 4 = High Priority, 3 = Medium Priority, 2 = Low Priority, 1 = No Priority, 0 = Do Not Know

5.3.2.2 The Focus of the Tourism Sector: Strategy and Competitiveness and the Local Community's Nationality

The relationship between the focus of the tourism sector: strategy and competitiveness, and the nationality of the local community were addressed. In Table 5.12, around 50%, the Omani participants agreed, statement 2.5 (M = 3.91, SD = 1.12), that most tourism projects and investments are mainly focused on developing accommodation and with less attention to other attractions. About 47%, the majority of the Omani participants agreed to statement 2.6 (M = 3.69, SD = 1.22), that the emphasis of tourism has been upon maximizing visitor numbers with less attention to their expenditures. Both statements showed a contradiction with the government's selective tourist's strategy, which mainly focuses on attracting wealthy and responsible visitors. More so, the results showed that 45.6% of the Omani participants agreed on statement 3.3 (M = 3.66, SD = 1.23) that the sector needs a new strategy replacing the current selective tourist's strategy to augment the sector's contribution in the national economy (GDP). Just 50% of the participants, who were Omanis, agreed to statement 4.3 (M = 3.81, SD = 1.18): that found tourism promotions and advertising methods, such as participating in international exhibitions, are not enough to represent the Sultanate's tourist resources. This indicates the need to change the methods of promoting the Sultanate abroad. The current methods may also not be enough to cope with the changes in the global tourism market and tourism needs. About 42.4% of the participants, who were Omanis, agreed on statement 4.4 (M = 3.56, SD = 1.23) that there is a lack of marketing strategy and weakness in promotional methods. The current marketing and promotional schemes are not good enough to reflect the Sultanate's tourist activities and attractions. Approximately 42% of Omani participants agreed that Oman's tourism sector has shown a slow, cumbersome, and incapable rate of change in comparison to other destinations in the GCC, statement 7.1 (M = 3.48, SD = 1.31). This indicates that the Sultanate has a long way to catch up with others in the region by focusing on the development of its infrastructure and changing its marketing and promotional methods.

Furthermore, all six statements, overall mean and standard deviation scores, were: M = 3.68, SD = 1.22. About 95% of respondents considered the focus of the tourism sector: strategy and competitiveness scores between 2.46 and 4.90. Another 14% of respondents valued below 2.46 and above 4.90 with two standard deviations. This view does reflect the focus of the tourism sector: strategy and competitiveness, and the nationality of the local community, also influences the local community's satisfaction. The overall statements were within the range "Agreed and Strongly Agreed."

The results revealed that most of the participants were Omanis, and they were not satisfied with the focus of the tourism sector: strategy and competitiveness. The p-values of the six statements were less than the significance level of 0.05. The results showed sufficient evidence that there is a dependence relationship between the demographic variable, nationality, and the focus of the tourism sector: strategy and competitiveness.

Table 5.12 Relationship between the Focus of the Tourism Sector: Strategy and Competitiveness and the Local Community's Nationality

Statements			**Local Community by Nationality**		**Total**
			Omani	**Expats: Non-Omani**	
2.5 Most tourism projects and investments are mainly focused on developing accommodation (hotels and resorts), and giving less attention to other attractions (theme parks, festivals, natural sites)	Agree	Respondents	**397**	177	574
		%	**50.30%**	22.40%	72.70%
	Neutral	Respondents	54	50	104
		%	6.8%	6.3%	13.2%
	Disagree	Respondents	62	47	109
		%	7.90%	5.90%	13.80%
	Do Not Know	Respondents	2	1	3
		%	0.3%	0.1%	0.4%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	26.349a	5	**0.000**	0.183	0.180
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 1.04.					
2.6 The emphasis of tourism in Oman has been upon maximizing visitor numbers with less attention to their expenditures.	Agree	Respondents	**367**	157	524
		%	**46.50%**	19.90%	66.40%
	Neutral	Respondents	79	60	139
		%	10.0%	7.6%	17.6%
	Disagree	Respondents	55	50	105
		%	6.90%	6.30%	13.20%
	Do Not Know	Respondents	14	8	22
		%	1.8%	1.0%	2.8%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	25.277a	5	**0.000**	0.179	0.176
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 7.66.					
	Agree	Respondents	**360**	151	511

Statements			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
3.3 The tourism sector needs a new strategy replacing the current selective tourists (wealthy travellers) strategy to increase the tourism contribution in the Gross Domestic Product (GDP).		%	**45.60%**	19.10%	64.70%
	Neutral	Respondents	68	62	130
		%	8.6%	7.8%	16.5%
	Disagree	Respondents	80	55	135
		%	10.10%	6.90%	17%
	Do Not Know	Respondents	7	7	14
		%	0.9%	0.9%	1.8%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	32.386a	5	**0.000**	0.202	0.198
a. 1 cells (8.3%) have expected count less than 5. The minimum expected count is 4.87.					
4.3 Tourism promotions and advertising methods, such as participating in international exhibitions, are not enough to represent Oman tourism resources.	Agree	Respondents	**395**	162	557
		%	**50%**	20.50%	71%
	Neutral	Respondents	60	59	119
		%	7.6%	7.5%	15.1%
	Disagree	Respondents	57	44	101
		%	7.20%	5.60%	12.80%
	Do Not Know	Respondents	57	44	101
		%	0.4%	1.3%	1.6%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	38.555a	5	**0.000**	0.221	0.216
a. 1 cells (8.3%) have expected count less than 5. The minimum expected count is 4.53.					
4.4 Marketing and promotion schemes do not reflect the destination activities and attractions.	Agree	Respondents	**335**	152	487
		%	**42.40%**	19.20%	61.60%
	Neutral	Respondents	88	55	143
		%	11.1%	7.0%	18.1%
	Disagree	Respondents	78	62	140
		%	9.80%	7.90%	17.70%
	Do Not Know	Respondents	14	6	20
		%	1.8%	0.8%	2.5%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	13.335a	5	**0.000**	0.130	0.129
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 6.96.					
7.1 Oman's tourism sector has shown a slow, cumbersome, and incapable rate of change compared to other destinations in the GCC.	Agree	Respondents	**331**	117	448
		%	**41.90%**	14.80%	56.70%
	Neutral	Respondents	81	68	149
		%	10.3%	8.6%	18.9%
	Disagree	Respondents	93	80	173
		%	11.80%	10.10%	21.90%
	Do Not Know	Respondents	10	10	20
		%	1.3%	1.3%	2.5%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	42.765a	5	**0.000**	0.233	0.227
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 6.96.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

5.3.2.3 Tourism Governance, and Uniqueness and Attractiveness of Tourist Products and Services and the Local Community's Nationality

Concerning the relationship between the variables: tourism governance, and uniqueness and attractiveness of tourist products and services, and the local community nationality, just 25% of the Omani participants showed a disagreeing with the statement 3.4 (M = 2.77, SD = 1.39) that tourism policies and regulations have encouraged private sector investments by providing incentives and benefits. In Table 5.13, around 30%, the participants, who were also all Omanis agreed on statement 3.5 with (M = 3.09, SD = 1.27) that the government policies and regulations had mitigated tourism's negative impacts such as unethical behaviour and practices from the locals and residents. The results showed that 33% of the Omani respondents disagreed with statement 5.2 (M = 2.77, SD = 1.30); Oman tourism products and services have a unique and robust position compared to other destinations in the region. 27.4% of the Omani participants agreed that events and programs (such as festivals, exhibitions, and summer packages) have been successful in attracting more visitors during the off-season autumn, statement 5.3 (M = 3.05, SD = 1.27). About 31%, where most participants were Omanis disagreed to statement 5.4 with (M = 2.82, SD = 1.22) that the current tourism products and services have evolved to cope with visitors' needs and wants.

Using the standard deviation empirical rule (68-95-99.7), approximately 95% of the local respondents' considered tourism governance, and uniqueness and attractiveness of tourist products and services to score between 1.61 and 4.19, meaning 14% of respondents valued below 1.61 and above 4.19 with two standard deviations. This view reflects that tourism governance, and uniqueness and attractiveness of tourist products and services influence the local community's satisfaction towards the development of the sector. However, the overall statements were within the range between "Neutral and Disagreed."

The results revealed that most of the participants were Omanis, and they were not satisfied with tourism governance, and the uniqueness and attractiveness of tourist products and services. The p-values of the 5 statements were less than the significant level of 0.05, except statement 3.5. However, the other statements showed sufficient evidence that there is a dependant relationship between the demographic variable, nationality, and the factor: tourism governance and uniqueness and the attractiveness of tourist products and services.

Table 5.13 Relationship between Tourism Governance, and the Uniqueness and Attractiveness of Tourist Products and Services and Local Community's Nationality

Statements			**Local Community by Nationality**		**Total**
			Omani	**Expats: Non-Omani**	
3.4 Tourism policies and regulations have encouraged private sector investments by providing incentives and benefits.	Agree	Respondents	152	101	253
		%	21.40%	12.70%	34.10%
	Neutral	Respondents	111	78	189
		%	14.1%	9.9%	23.9%
	Disagree	Respondents	**198**	69	267
		%	**25.10%**	8.70%	33.80%
	Do Not Know	Respondents	37	27	64
		%	4.7%	3.4%	8.1%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	15.931a	5	**0.007**	0.142	0.141
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 22.28.					

Statements			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
3.5 Tourism policies and regulations mitigate the negative impacts of tourism, such as the unethical behaviour and practices from locals and visitors.	Agree	Respondents	**235**	120	355
		%	**29.70%**	15.20%	44.90%
	Neutral	Respondents	120	69	189
		%	15.2%	8.7%	23.9%
	Disagree	Respondents	136	75	211
		%	17.20%	9.50%	26.70%
	Do Not Know	Respondents	24	11	35
		%	3.0%	1.4%	4.4%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	0.864a	5	**0.973**	0.033	0.033
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 12.18.					
5.2 Oman tourism products and services have a unique and robust position compared to other destinations such as the UAE and Qatar.	Agree	Respondents	166	105	271
		%	21%	13.30%	34.30%
	Neutral	Respondents	86	60	146
		%	10.9%	7.6%	18.5%
	Disagree	Respondents	**260**	97	357
		%	**33%**	12.30%	45.30%
	Do Not Know	Respondents	3	13	16
		%	0.4%	1.6%	2.0%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	35.646a	5	**0.000**	0.212	0.208
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 5.57.					
5.3 Events and programs (such as festivals, exhibitions, and summer packages) have been successful in attracting more visitors during the off-season autumn (Khareef).	Agree	Respondents	**216**	137	353
		%	**27.40%**	17.30%	44.70%
	Neutral	Respondents	110	58	168
		%	13.9%	7.3%	21.3%
	Disagree	Respondents	183	68	251
		%	23.20%	8.60%	31.80%
	Do Not Know	Respondents	6	12	18
		%	0.8%	1.5%	2.3%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	23.790a	5	**0.000**	5	0.174
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 6.27.					
5.4 The current tourism products and services have evolved regularly to cope with visitors' needs and wants.	Agree	Respondents	150	119	269
		%	19%	15.10%	34%
	Neutral	Respondents	111	75	186
		%	14.1%	9.5%	23.5%
	Disagree	Respondents	**241**	72	313
		%	**30.50%**	9.10%	39.60%
	Do Not Know	Respondents	13	9	22
		%	1.6%	1.1%	2.8%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	32.968a	5	**0.000**	0.204	0.200
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 7.66.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

5.3.2.4 Tourism Projects and Investments and Employment Opportunities and the Local Community's Nationality

Concerning the associations between tourism projects and investments and employment opportunities and the local community nationality, 27.3% of the Omani respondents disagreed with statement 7.2 (M = 2.78, SD = 1.30) that employment opportunities have shown an increase in the tourism sector compared to other services sectors such as commerce, health and education. In other words, the tourism sector still has a low rate of employment opportunities compared to other services sectors. Table 5.14 showed that about 27% of the Omani participants disagreed that the sector has contributed significantly to Oman's economy through investments and infrastructure projects, statement 7.3 (M = 2.87, SD = 1.30). About 24%, the majority of the participants who were Omanis, disagreed with the statement 7.4 (M = 3.01, SD = 1.23) that tourism investments have caused changes in the community's social life.

The overall mean and standard deviation scores of all 3 statements were: M = 2.88, SD = 1.28. About 95% of respondents considered tourism projects and investments and employment opportunities scores between 1.60 and 4.16. Another 14% of respondents valued tourism projects and investments and employment opportunities below 1.60 and above 4.16 with two standard deviations. This view does reflect that the tourism projects, investments and employment opportunities influence the local community's satisfaction towards the development of the sector. The overall statements were within the range between "Neutral and Disagreed."

The results revealed that most of the participants were Omanis and that they were not satisfied with the tourism projects, investments and employment opportunities. Regarding the p-values of the 3 statements, the results showed less than the significance level of 0.05. There is a dependent relationship between the demographic variable, nationality, and the factor: tourism projects, investments and employment opportunities.

Table 5.14 Relationship between Tourism Projects, and Investments and Employment Opportunities and Local Community's Nationality

Statements			**Local Community by Nationality**		**Total**
			Omani	**Expats: Non-Omani**	
7.2 Employment opportunities have shown an increase in the tourism sector compared to other service sectors such as commerce, health and education.	Agree	Respondents	152	106	258
		%	19.20%	13.40%	32.60%
	Neutral	Respondents	120	86	206
		%	15.2%	10.9%	26.1%
	Disagree	Respondents	**216**	64	280
		%	**27.30%**	8.10%	35.40%
		%	8.1%	1.8%	9.9%
	Do Not Know	Respondents	27	19	46
		%	3.4%	2.4%	5.8%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	28.806a	5	**0.000**	0.191	0.188
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 16.01.					
7.3 The tourism sector has contributed greatly to Oman's economy through investments and infrastructure projects.	Agree	Respondents	169	123	292
		%	21.30%	15.60%	36.90%
	Neutral	Respondents	117	73	190
		%	14.8%	9.2%	24.1%
	Disagree	Respondents	**209**	64	273
		%	**26.50%**	8.10%	34.60%
	Do Not Know	Respondents	20	15	35

Statements			Local Community by Nationality		Total
			Omani	**Expats: Non-Omani**	
		%	2.5%	1.9%	4.4%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	25.367a	5	**0.000**	0.179	0.176
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 12.18.					
7.4 Tourism investments have caused changes in the community social life.	Agree	Respondents	181	144	325
		%	22.90%	18.20%	41.10%
	Neutral	Respondents	132	60	192
		%	16.7%	7.6%	24.3%
	Disagree	Respondents	**189**	64	253
		%	**23.90%**	8.10%	32.00%
	Do Not Know	Respondents	13	7	20
		%	1.6%	0.9%	2.5%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	24.237a	5	**0.000**	0.175	0.173
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 6.96.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

5.3.2.5 Destination Development Strategy and the Local Community's Nationality

The relationship between the factor destination development strategy, the National Tourism Strategy (NTS), and the nationality of the local community were addressed in 3 statements, as shown in Table 5.15. About 32% of the Omani participants disagreed with statement 3.1 (M = 2.83, SD = 1.27) that the national tourism strategy (NTS) is well known among the local community and might not be achievable as with Vision 2020. Next, 24% of the Omani participants disagreed with statement 3.2 (M = 2.48, SD = 1.35) that the strategy (NTS) has been reflected clearly through the projects and investments in the sector. In other words, this may indicate dissatisfaction with the respondents that the sector projects and investments are not enough to reflect the strategy (NTS). Finally, 30.4% of participants who were all Omanis disagreed with the statement 5.1 (M = 2.78, SD = 1.20) that the Sultanate's tourist products and services have met the local community needs in terms of diversification, availability, accessibility and suitability.

The overall mean and standard deviation scores of all three statements were M = 2.69, SD = 1.27. About 95% of respondents considered destination development strategy: The National Tourism Strategy (NTS) scores between 1.42 and 3.96. Another 14% of respondents valued tourism projects and investments and employment opportunities below 1.42 and above 3.96 with two standard deviations. This view does reflect that the destination development strategy: the National Tourism Strategy (NTS) influence the local community's satisfaction towards the development of the sector. The overall statements were within the range between "Neutral and Disagreed."

The results revealed that most of the participants were Omanis, and they were not satisfied with the destination development strategy. Regarding the p-values of the three statements, the results showed less than the significance level of 0.05, except in statement 3.2. However, the other statements showed sufficient evidence that there is a dependence relationship between the demographic variable, nationality, and factor destination development strategy.

Table 5.15 Relationship between Destination Development Strategy and Local Community's Nationality

Statements			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
3.1 The national tourism strategy (NTS) is well known among the local community and can be achievable compared to the previous Vision 2020.	Agree	Respondents	115	89	204
		%	14.50%	11.30%	25.80%
	Neutral	Respondents	113	71	184
		%	14.3%	9.0%	23.3%
	Disagree	Respondents	**254**	88	342
		%	**32.20%**	11.20%	43.40%
	Do Not Know	Respondents	33	27	60
		%	4.2%	3.4%	7.6%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	27.276a	5	**0.000**	0.186	0.183
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 16.71.					
3.2 The national tourism strategy has been reflected clearly through the projects and investments in the tourism sector.	Agree	Respondents	151	106	257
		%	19.10%	13.40%	32.50%
	Neutral	Respondents	152	75	227
		%	19.2%	9.5%	28.7%
	Disagree	Respondents	**187**	76	263
		%	**23.60%**	9.60%	33.20%
	Do Not Know	Respondents	25	18	43
		%	3.2%	2.3%	5.4%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	10.714a	5	**0.057**	0.116	0.116
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 14.97.					
5.1 Oman tourism products and services have met the local community (domestic tourist) needs in terms of diversification, availability, accessibility and suitability.	Agree	Respondents	156	105	261
		%	19.70%	13.30%	33.00%
	Neutral	Respondents	112	63	175
		%	14.2%	8.0%	22.2%
	Disagree	Respondents	**240**	96	336
		%	**30.40%**	12.20%	42.60%
	Do Not Know	Respondents	7	11	18
		%	0.9%	1.4%	2.3%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	20.170a	5	**0.001**	0.160	0.158
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 6.27.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

5.3.2.6 The Collaboration of the Government, Tourism Businesses and the Local Community's Nationality

Concerning the relationship between the variables, the collaboration of the government and tourism businesses, and the local community's nationality, approximately 39% of Omani participants agreed that the development of the sector should be fully controlled and privatized, replacing the Omani government, statement 2.1 as appeared in Table 5.16. Also, the statement

(M = 3.39, SD = 1.27) indicated the weak role of the private sector in the sector development process, and how the government fully controls the sector. Also, how government intervention in the sector may not fulfil the community's needs. About 28% of the Omani participants agreed that the development of the sector has encouraged many SMEs to establish projects within the sector; statement 7.5 (M = 3.07, SD = 1.26). Finally, 28.4% of the Omani participants agreed to statement 7.6 (M = 3.16, SD = 1.18) that tourism projects and investments have improved the country's infrastructures and facilities (e.g., roads, telecommunications, utilities).

The overall mean and standard deviation scores of all three statements were M = 3.20, SD = 1.24. About 95% of respondents considered the collaboration of the government and tourism businesses scores between 1.96 and 4.44. Another 14% of respondents valued below 1.96 and above 4.44 with two standard deviations. This view does reflect that the collaboration of the government and tourism businesses influence the local community's satisfaction. The overall statements were within the range between "Neutral and Agreed."

The results revealed that most of the participants were Omanis, and they were not satisfied with the collaboration of the government and tourism businesses. The p-values of the 3 statements were more than the significance level of 0.05, except in statements 2.1. However, the other statements showed no sufficient evidence that there is a dependence relationship between the demographic variable, nationality, and that the government fully controls the sector.

Table 5.16 Relationship between the Collaboration of the Government and Tourism Businesses and the Local Community's Nationality

<table>
<tr><th colspan="3" rowspan="2">Statements</th><th colspan="2">Local Community by Nationality</th><th rowspan="2">Total</th></tr>
<tr><th>Omani</th><th>Expats: Non-Omani</th></tr>
<tr><td rowspan="10">2.1 The development of the tourism sector should be fully controlled and privatized, replacing the Omani government.</td><td rowspan="2">Agree</td><td>Respondents</td><td>306</td><td>105</td><td>411</td></tr>
<tr><td>%</td><td>38.70%</td><td>13.30%</td><td>52.00%</td></tr>
<tr><td rowspan="2">Neutral</td><td>Respondents</td><td>87</td><td>65</td><td>152</td></tr>
<tr><td>%</td><td>11.0%</td><td>8.2%</td><td>19.2%</td></tr>
<tr><td rowspan="2">Disagree</td><td>Respondents</td><td>121</td><td>104</td><td>225</td></tr>
<tr><td>%</td><td>15.30%</td><td>13.20%</td><td>28.50%</td></tr>
<tr><td rowspan="2">Do Not Know</td><td>Respondents</td><td>1</td><td>1</td><td>2</td></tr>
<tr><td>%</td><td>0.1%</td><td>0.1%</td><td>0.3%</td></tr>
<tr><td rowspan="2">Total</td><td>Respondents</td><td>515</td><td>275</td><td>790</td></tr>
<tr><td>%</td><td>65.2%</td><td>34.8%</td><td>100.0%</td></tr>
<tr><td rowspan="2">Pearson Chi-Square</td><td>Value</td><td>df</td><td>Asymptotic Significance</td><td>Phi</td><td>Contingency Coefficient</td></tr>
<tr><td>40.560a</td><td>5</td><td>0.000</td><td>0.227</td><td>0.221</td></tr>
<tr><td colspan="6">a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is .70.</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td rowspan="10">7.5 The development of the tourism sector has encouraged many small, medium enterprises (SMEs) to establish projects within the sector.</td><td rowspan="2">Agree</td><td>Respondents</td><td>222</td><td>141</td><td>363</td></tr>
<tr><td>%</td><td>28.10%</td><td>17.80%</td><td>45.90%</td></tr>
<tr><td rowspan="2">Neutral</td><td>Respondents</td><td>113</td><td>56</td><td>169</td></tr>
<tr><td>%</td><td>14.3%</td><td>7.1%</td><td>21.4%</td></tr>
<tr><td rowspan="2">Disagree</td><td>Respondents</td><td>161</td><td>67</td><td>228</td></tr>
<tr><td>%</td><td>20.40%</td><td>8.50%</td><td>28.90%</td></tr>
<tr><td rowspan="2">Do Not Know</td><td>Respondents</td><td>19</td><td>11</td><td>30</td></tr>
<tr><td>%</td><td>2.4%</td><td>1.4%</td><td>3.8%</td></tr>
<tr><td rowspan="2">Total</td><td>Respondents</td><td>515</td><td>275</td><td>790</td></tr>
<tr><td>%</td><td>65.2%</td><td>34.8%</td><td>100%</td></tr>
<tr><td>Pearson Chi-Square</td><td>Value</td><td>df</td><td>Asymptotic Significance</td><td>Phi</td><td>Contingency Coefficient</td></tr>
</table>

Statements			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
	6.087a	5	**0.298**	0.88	0.087
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 10.44.					
7.6 Tourism projects and investments have improved the country’s infrastructures and facilities (e.g., roads, telecommunications, utilities)	Agree	Respondents	**225**	143	368
		%	**28.40%**	18.10%	46.50%
	Neutral	Respondents	130	71	201
		%	16.5%	9.0%	25.4%
	Disagree	Respondents	147	57	204
		%	18.60%	7.20%	25.80%
	Do Not Know	Respondents	13	4	17
		%	1.6%	0.5%	2.2%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	10.312a	5	**0.067**	0.114	0.114
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 5.92.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Strongly Disagree, 1 = 2 = Strongly Disagree, 0 = Do Not Know

5.3.2.7 Exploitation of Destination Resources and the Local Community’s Nationality

Concerning the relationship between the variables: exploitation of destination resources (natural and human) and the local community nationality were addressed in three statements in Table 5.17. The results showed an agreement from both Omani (approx. 32%) and 19.4% from the non-Omani participants on statement 2.2 (M = 3.32, SD = 1.18) that tourism projects and activities are based on and related to the community attitude and do fulfil its needs. Also, both participants (Omani and ex-pats) agreed to the statement, 2.3, (M = 3.39, SD = 1.14) that the sector has shown an increase in qualified and competent Omanis in the government or tourism businesses, 36% and 20%, respectively. In terms of exploiting and protecting the resources, approximately 26% of the Omani participants showed an agreement with the statement, 2.4 (M = 3.07, SD = 1.17), Oman’s tourism resources (natural and human-made) have been exploited and protected from any negative impacts.

The overall mean and standard deviation scores of all three statements were M = 3.25, SD = 1.16. About 95% of respondents considered exploitation of destination resources (natural and human) scores between 2.09 and 4.41. Another 14% of respondents valued tourist products and services below 1.68 and above 4.41 with two standard deviations. This view does reflect that exploitation of destination resources (natural and human) also influence local community satisfaction. The overall statements were within the range between “Neutral and Agreed.”

The results revealed that both participants Omanis, and non-Omanis, were satisfied and agreed on the exploitation of destination resources (natural and human). The p-values of the three statements were less than the significance level of 0.05, except in statements 2.4. However, the other statements showed sufficient evidence that there is a dependent relationship between the demographic nationality and the factor: exploitation of destination resources (natural and human).

Table 5.17 Relationship between Exploitation of Destination Resources and the Local Community's Nationality

Statements			Local Community by Nationality: Omani	Local Community by Nationality: Expats: Non-Omani	Total
2.2 Tourism projects and activities are based on and related to the community attitudes and needs.	Agree	Respondents	**252**	153	405
		%	**31.90%**	19.40%	51.30%
	Neutral	Respondents	100	62	162
		%	12.7%	7.8%	20.5%
	Disagree	Respondents	160	59	219
		%	20.30%	7.50%	27.80%
	Do Not Know	Respondents	3	1	4
		%	0.4%	0.1%	0.5%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	22.964a	5	**0.000**	0.170	0.168
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 1.39.					
2.3 The tourism sector has shown an increase in qualified and competent Omanis in both the public and private sectors.	Agree	Respondents	**284**	156	440
		%	**35.90%**	19.80%	55.70%
	Neutral	Respondents	116	68	184
		%	14.7%	8.6%	23.3%
	Disagree	Respondents	104	44	148
		%	13.20%	5.50%	18.70%
	Do Not Know	Respondents	11	7	18
		%	1.4%	0.9%	2.3%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	12.127a	5	**0.033**	0.124	0.123
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 6.27.					
2.4 Oman's tourism resources (natural and human-made) have been exploited and protected from negative impacts.	Agree	Respondents	**204**	117	321
		%	**25.80%**	14.80%	40.60%
	Neutral	Respondents	124	75	199
		%	15.7%	9.5%	25.2%
	Disagree	Respondents	182	78	260
		%	23.10%	9.90%	33.00%
	Do Not Know	Respondents	5	5	10
		%	0.6%	0.6%	1.3%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	7.505a	5	**0.186**	0.097	0.097
a. 1 cells (8.3%) have expected count less than 5. The minimum expected count is 3.48.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

5.3.2.8 Availability and Variety of Tourist Products and Services and the Local Community's Nationality

Concerning the relationship between the variables: availability, and variety of tourist products and services, and the local community nationality, Table 5.18 showed that approximately 26% of the participants who were Omanis agreed on statement 5.5 (M = 3.04, SD = 1.26), Oman, as a domestic destination, offers a wide range of tourism attractions and activities in which the local community members are able to engage. Also, 30.4%, the majority of the respondents, Omanis, agreed on statement 5.6 (M = 3.20, SD = 1.28) that tourism mega-projects, public services, luxury hotels, and resorts reflect the Sultanate's selective strategy. This indicates the possibility of the government strategy on attracting wealthy and responsible tourists by the provision of luxury and high-standard tourism products and services.

The overall mean and standard deviation scores of both statements were M = 3.12, SD = 1.27. About 95% of respondents considered availability and variety of tourist products and services and scores between 1.85 and 4.39. Another 14% of respondents valued availability and variety of tourist products and services below 1.85 and above 4.39 with two standard deviations. This view does reflect that the availability and variety of tourist products and services also influence local community satisfaction. The overall statements were within the range between "Neutral and Disagreed."

The results revealed that most of the participants were Omanis and that they were satisfied with the availability, and variety of tourist products and services. The p-values of the two statements were less than the significance level of 0.05 except statement 5.6. However, the other statement showed sufficient evidence that there is a dependent relationship between the nationality of the local community and the availability and variety of tourist products and services.

Table 5.18 Relationship between Availability, and Variety of Tourist Products and Services and Local Community's Nationality

Statements			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
5.5 Oman, as a domestic destination, offers a wide range of tourism attractions and activities in which the local community members are able to engage.	Agree	Respondents	**201**	137	338
		%	**25.50%**	17.30%	42.80%
	Neutral	Respondents	111	60	171
		%	14.1%	7.6%	21.6%
	Disagree	Respondents	189	74	263
		%	23.90%	9.40%	33.30%
	Do Not Know	Respondents	14	4	18
		%	1.8%	0.5%	2.3%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	15.648a	5	**0.008**	0.141	0.139
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 6.27.					
5.6 Tourism mega projects, public services, luxury hotels, and resorts reflect the Sultanate's selective strategy, which seeks wealthy travellers.	Agree	Respondents	**240**	144	384
		%	**30.40%**	18.20%	48.60%
	Neutral	Respondents	112	60	172
		%	14.2%	7.6%	21.8%
	Disagree	Respondents	148	61	209
		%	18.80%	7.70%	26.50%
	Do Not Know	Respondents	15	10	25
		%	1.9%	1.3%	3.2%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	5.719a	5	**0.335**	0.085	0.085
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 8.70.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

5.3.2.9 Destination Marketing Activities and Promotional Methods and the Local Community's Nationality

Concerning the relationship between the variables: destination marketing activities, and promotion methods, and the local community's nationality, the majority of the participants, Omanis (approx. 39%), agreed on statement 4.1 (M = 3.45, SD = 1.30) that Oman has reached the recognized global level as other GCC countries, despite the fact that the development of the sector is still behind neighbouring countries, as shown in Table 5.19. Among the participants, 38%, all, who were Omanis, agreed on statement 4.2 (M = 3.46, SD = 1.20) that the focus of the government and tourism business promotional campaigns are more likely to attract international tourists rather than domestic the ones.

The two statements' overall mean and standard deviation scores were: M = 3.45, SD = 1.25. About 95% of respondents considered destination marketing activities and promotional methods scores between 2.20 and 4.70. Another 14% of respondents valued below 2.20 and above 4.70 with two standard deviations. This view does reflect that destination marketing activities and promotional methods influence the local community's satisfaction. The overall statements were within the range between "Neutral and Agreed."

The results revealed that most of the participants were Omanis, and they were not satisfied with the sector marketing activities and promotional methods. The p-values of the two statements were less than the significance level of 0.05. This means there is sufficient evidence that there is a dependence relationship between demographic nationality and destination marketing activities and promotional methods.

Table 5.19 Relationship between Destination Marketing Activities and Promotional Methods and Local Community's Nationality

Statement			**Local Community by Nationality**		**Total**
			Omani	**Expats: Non-Omani**	
4.1 As a tourism destination, Oman has reached the recognized global level as other GCC countries (UAE, Qatar, Saudi Arabia).	Agree	Respondents	**310**	132	442
		%	**39.30%**	16.70%	56.00%
	Neutral	Respondents	86	51	137
		%	10.9%	6.5%	17.3%
	Disagree	Respondents	115	90	205
		%	14.60%	11.40%	26.00%
	Do Not Know	Respondents	4	2	6
		%	0.5%	0.3%	0.8%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	27.182a	5	**0.000**	0.185	0.182
a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is 2.09.					
4.2 Government authorities and tourism businesses promotional campaigns are more likely focusing on attracting	Agree	Respondents	**299**	149	448
		%	**37.90%**	18.80%	56.70%
	Neutral	Respondents	105	62	167
		%	13.3%	7.8%	21.1%
	Disagree	Respondents	100	58	158

Statement			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
international tourists rather than domestic ones.		%	12.70%	7.30%	20.00%
	Do Not Know	Respondents	11	6	17
		%	1.4%	0.8%	2.2%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	18.803a	5	**0.002**	0.154	0.152
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 5.92.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

5.3.2.10 Tourism's Economic Impact versus the Environment, Society and the Local Community's Nationality

Lastly, the relationship between tourism's economic impact versus the environment and society, and the local community's nationality, approx. 30% of the majority of participants, who were all Omanis, disagreed with the statement 2.7 (M = 2.89, SD = 1.19) that the local community well recognizes the government's efforts and initiatives in developing the sector. In other words, the local community is not satisfied with the government's efforts and initiatives in developing the sector. Also, around 29% of the participants, who were mostly Omanis, agreed to statement 2.8 (M = 3.06, SD = 1.27), that the government considers tourism's economic goals are more important than the negative impacts on the environment and community culture, as shown in Table 5.20.

The two statements, overall mean and standard deviation scores, were: M = 2.97, SD = 1.23. About 95% of respondents considered tourism's economic impacts versus the environment and society scores between 1.74 and 4.20. Another 14% of respondents valued below 1.74 and above 4.20 with 2 standard deviations. This view does reflect that tourism's economic impact versus the environment and society influence the local community's satisfaction. The overall statements were within the range between "Neutral and Disagreed."

The results revealed that most of the participants were Omanis, and they were not satisfied with tourism's economic impact versus the environment and society. The p-values of the two statements were less than the significance level of 0.05 except statement 2.8. However, the other statement showed sufficient evidence that there is a dependence relationship between the demographic variable, nationality, and tourism's economic impact versus the environment and society.

Table 5.20 Relationship between Tourism's Economic Impact versus the Environment and Society and the Local Community's Nationality

Statements			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
	Agree	Respondents	153	126	279

Statements			Local Community by Nationality		Total
			Omani	Expats: Non-Omani	
2.7 The Omani government's efforts and initiatives in developing the tourism sector are well recognized by the local community.		%	19.40%	15.90%	35.30%
	Neutral	Respondents	127	69	196
		%	16.1%	8.7%	24.8%
	Disagree	Respondents	**234**	68	302
		%	**29.70%**	8.60%	38.30%
	Do Not Know	Respondents	1	12	13
		%	0.1%	1.5%	1.6%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	53.551a	5	**0.000**	0.260	0.252
a. 1 cells (8.3%) have expected count less than 5. The minimum expected count is 4.53.					
2.8 The government considers that tourism's economic goals are more important than the negative impacts on the environment and community culture.	Agree	Respondents	**226**	116	342
		%	**28.60%**	14.70%	43.30%
	Neutral	Respondents	117	67	184
		%	14.8%	8.5%	23.3%
	Disagree	Respondents	149	84	233
		%	18.90%	10.70%	29.60%
	Do Not Know	Respondents	23	8	31
		%	2.9%	1.0%	3.9%
	Total	Respondents	515	275	790
		%	65.2%	34.8%	100%
Pearson Chi-Square	**Value**	**df**	**Asymptotic Significance**	**Phi**	**Contingency Coefficient**
	2.755a	5	**0.738**	0.059	0.059
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 10.79.					

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

5.4 SUMMARY

This chapter provides the analysis and results of the questionnaires obtained from the respondents of the local community. Descriptive and multivariate (Exploratory Factor Analysis) were employed to explore the inter-relationships between a ten-factor structure (satisfaction factors) and the demographic variable: local community's nationality.

CHAPTER SIX: VISITORS' SURVEY DATA ANALYSIS & RESULTS

6.1 INTRODUCTION

This chapter shows the analysed data and results from the survey questionnaire, *the visitors' satisfaction towards the development of the tourism sector in Oman*. The survey was used to investigate the development of the sector from the visitors' (international tourists and business travellers) perspectives with destination marketing and promotion, tourist products and services, and the development of destination products. Also, the survey aimed to address the study objective (No. 3): *To examine how different marketing methods can be used to attract a higher number of tourists and become a preferred tourist destination* (see *section 1.4*); and the related research question (No. 3): *To what extent have the marketing strategies and programs stimulated visitors to visit Oman?* and sub-questions: *What are the marketing strategies that the tourism sector has adopted to promote Oman regionally and internationally? To what extent are the destination image and branding developed? What are the tourism products and services that are provided to visitors?* and *To what extent are the visitor's demands and the destination supplies in agreement?*

Similar to the previous chapter, the primary variables of the questionnaire consisted of 38 questions and statements separated into six sections (see *Appendix I-B: Visitor Questionnaire*). For the measurement of the visitors' satisfaction with the sector, the obtained data was analysed using SPSS (V.25). The analysis process was segmented into 2 stages. In the first stage, the descriptive analysis was used to examine the visitors' demographic characteristics, the details of the visit, destination marketing and promotion, and visitors' overall satisfaction about the development of the sector. The second stage was identifying the factors that determine the visitors' satisfaction through employing *Exploratory Factor Analysis (EFA)* using *Principal Component Analysis (PCA)* with *Varimax Rotation* (see *section 3.4.1.2*).

6.2 DESCRIPTIVE RESULTS OF THE VISITORS' SATISFACTION VARIABLES

This section describes the relationships and differences of each variable based on the frequencies and percentages of respondents' responses. The descriptive statistic, such as means, standard deviations, and the percentage was examined to understand and synthesis a broader spectrum of the visitors' satisfaction. It should be noted that a higher score, for example, mean values, represents a high satisfaction with the development of the tourism sector, while a lower rating suggests low satisfaction.

6.2.1 Visitors' Demographic Profile

The visitor's demographic represents a pivotal component to examine visitors' satisfaction with the development of the sector during and after their visit to Oman. Table 6.1 demonstrated the descriptive results for five demographic characteristics, considering gender, age, nationality, professional background, and their travel companion(s).

In terms of gender, there was a total of 210 respondents involved in this study, 49% were males, and 51% were females. This could be related to the increasing number of female visitors who prefer to travel to Oman because of the country's perceived safety and security. According to the Global Peace Index (GPI) 2019, the Sultanate was ranked 4th among the MENA countries and 69th in the world (OmanObserver, 2019a). The majority of respondents involved were of aged between 31-40 years old (25%), the second age group was 41-50 years (nearly 24%), the third was between 21-30 years old (18%), the fourth was between 51-60 years old about 17%, and only just 16% of the respondents were 60 and above. Respondents younger than age 21 were automatically excluded. For the visitors' nationalities (country of origin), 45 nationalities were recorded for 210 participants. The results were categorized into 4 different nationalities: 14% were Germans and nearly 14% from the United Kingdom (UK). Visitors from India made up 13.7%, and 'other countries' accounted for 58%. This should concur with the NCSI statistics that most of the visitors in Oman come from these countries. However, those visitors might not come directly from their home countries, as they might be visiting neighbouring countries, e.g., the UAE, and as a part of their trip plan, they come to Oman afterwards. Notably, the sample of the study showed that the nationality of neighbouring countries (GCC citizens) was not even listed in the top five nationalities. This indicates that interest in Oman from the GCC citizens is low. This indicates the need for a marketing campaign for the GCC countries to promote Oman's tourist products and services and its future potentials. Concerning respondents' employment status, it was interesting to note that the sample to Oman was relatively high, with 65% of visitors were employed in managerial and professional occupations. In comparison, 16% were retired, and other occupations were as businessperson or freelancer, and job seeker, at about 12%. College students made up 7% of the total visitors. In terms of travel companion(s), the results showed that more than 35% preferred to travel solo, others either travelled with family, 27%, or 20% as part of a couple. Travelling with friends was nearly 12%, and tourist groups were below 5%. The results implied that those travelling solo might enjoy being alone to explore and set their own travel destinations and decisions. Also, it should be considered that many visitors, mostly young or mature, chose where to travel independently and are characterized by discovering and knowing new places with no bond constraint to others, such as family members or travel groups. Moreover, the results showed that Oman has excellent potential for family tourism (27%). Therefore, tourism developers should focus on providing tourism activities for families, particularly those from neighbouring countries, the GCC countries.

Table 6.1 Profile of the Visitors' Demographics

Demographic Characteristics	Total Frequency (N = 210)	Percentage (%)
Gender		
Male	102	49
Female	108	51
Age Group		
21-30	38	18.1
31-40	53	25.2
41-50	50	23.8
51-60	35	16.7
Over 60	34	16.2
Nationality: Country of Origin		
Germany	30	14.3
United Kingdom (UK)	29	13.8
India	29	13.8
Others	122	58.1
Employment Status (Occupation)		
Employed (Public sector/Private sector)	136	64.8
Retired	34	16.2
Student (Diploma, BA/BS/, MA/MSc, PhD)	15	7.1
Other	25	11.9
Travel Companion(s)		
Solo Traveller	76	36.2
Couple	42	20
Family with children	57	27.1
Friends	25	11.9
Group of Tourists	10	4.8

Note: some percentages are rounded up to the nearest unit.
Source. Visitors' Survey

6.2.2 Details of the Visit (Trip Characteristics)

Referring to the demographic profile, the purpose of this section is to illustrate not only the extent to which previous experience might inform and enhance participants' responses, but also shed light on other factors or motivators to visit the Sultanate which may indicate a potential for the Sultanate to develop the sector. Table 6.2 demonstrated the descriptive results for 9 visit (trip) characteristics, concerning the visitors' frequency of the visit to Oman, their knowledge about Oman, the purpose of their visit, mode of transport (to and from Oman), their length of stay, and their travel budget. In addition, it is important to note that none of the respondents had ticked more than one choice.

Concerning the frequency of visits to Oman, the results recorded that the majority of the respondents were repeat-visitors (46%). They were familiar with the Sultanate and have visited more than three times, followed by over 30% who were first-time visitors, and 2-3 times at 22%. The percentage of frequent visitors indicates a strong association with the revisit intention of the destination, which implies that Oman will become a favoured tourism destination for many visitors.

Regarding the respondents' knowledge and sources of information about Oman, the results showed that 35% of the respondents knew about Oman before their visit. This is statistically significant in how information about Oman as a tourism destination is disseminated. A further 29% heard about Oman from friends and relatives who have been to Oman (word of mouth). Despite social media programs, the new methods of promoting a destination, there is still a high dependence on word of mouth as a reliable reference before visiting a new place.

While modern technologies, social media platforms (e.g., YouTube, Facebook, Twitter, and Instagram) are currently a significant source of information, they represented less than 3% of the respondents' information source. This indicates that social media platforms are not well utilized in marketing the Sultanate abroad. Therefore, those information sources, in particular social media, must be taken into consideration for the future promotion and marketing of tourism in Oman. Just 8% of the visitors relied on the Internet (Travel and Guidance Websites) as the source of information, whereas 4% used travel agencies, and 3% used TV/Radio/Newspaper/Magazines. 5% of the respondents knew about Oman from their visits to international travel exhibitions such as WTM and ITB Berlin, and this is a serious issue that the Ministry of Tourism (MOT) needs to address. Overall, as a reflection of the numbers quoted above, it appears that the Sultanate has not yet developed coherent strategies for marketing and promoting itself to develop the sector at the time of this study.

Respondents reported a variety of travel purposes to the Sultanate. A little over 25% of the respondents visited the Sultanate for its natural attractions (its abundant biodiversity and unspoiled beaches as well as other significant motivators), while 21% for official or business work. Accompanying or visiting friends and relatives (VFR) appeared to be another definite purpose to visit Oman, according to 15% of the respondents. These visitors might come from neighbouring countries, especially the UAE, because of the strong social bond between the two countries. Furthermore, these visits might have a limited contribution to the destination economy (GDP) compared to holiday/leisure and business trips, as many travellers visiting friends and family will tend to spend less money in the destination. Around 13% visited Oman as a new destination, and 10% was for sports and recreation. Other purposes, such as research/field trips, attending a conference, were stated less frequently. Most participants' primary purpose was for its natural resources/beauty (beaches, deserts, mountains) to work, indicating some potential for the Sultanate to develop the tourism sector.

Regarding the mode of transportation to Oman, the Sultanate's location on the south-eastern coast of the Arabian Gulf with limited access by road means that more than 75% of the participants preferred to arrive by air. In comparison, about 19% drove to Oman from the UAE and very infrequently through Yemen due to the country's ongoing conflict. In 2019, a highway between Oman and Saudi Arabia opened, which may encourage more people to travel by car to Oman in the future. The cruise ship industry is relatively new in Oman, and this may account for scores below 3% in the survey results. According to the NCSI (2020), the number of visitors to Oman by cruise ship in 2019 was 283,488 compared to 193,467 in 2018. The rate of change in 2019 recorded a 47% growth in the number of cruise ship visitors compared to the previous year. Additionally, an optional question connected to air transport was given to the participants (a total of 165 respondents) to state the airlines they flew with to Oman. These airlines have direct flights to Oman airports. 41% of the total of 165 respondents flew with Oman Air (the national carrier). The second carrier was with Emirates (16%) and then Qatar airways (13%). The rest took different airlines based in Europe or Asia. It is important to note that other flights can be the charter flights from Europe to Oman during the winter season, such as Italian carrier Neos and Nordwind Airlines.

Regarding lengths of visit, the results showed that most of the respondents stayed for a week (36%). In comparison, about 17% stay for a fortnight (two weeks), indicating that the visitors had enough time to experience and get an overall image of the Sultanate. However, those who stayed longer than two weeks might be visiting friends and relatives. On the other hand, 11% of the respondents might only prefer to have a short stay, short break, or a few weeks to go alongside business trips or to attend conferences or seminars. This indicates that Oman could be a short trip destination; therefore, it should be promoted more as a destination for short breaks for business travellers, in combination with other activities in the surrounding area. Types of accommodations were evaluated under five categories, as demonstrated in Table 6.2. According to the frequency scores, around 39% of the respondents preferred to stay in hotels or resorts (international), which dominated the central part of the accommodation. Although the accommodation facilities are an important product to attract more visitors, some visitors are more likely to be satisfied with less luxurious accommodation: local apartments, tourist villas, and other paid accommodation. About 25% of the respondents stayed at a local hotel apartment (economically priced hotels), and 22% of the participants preferred to stay at their friends' or families' places. Those who preferred to stay at local hotels (low-cost accommodation) could be solo travellers or might be those who are planning to visit Oman for more than a week. Therefore, they might be planning to save money on accommodation. Other options, 15%, were rented apartments, student accommodation, camping, and cruise ships. Moreover, an optional question connected to hotels and resorts was given to the participants (a total of 81 respondents chose hotels and resorts). The majority of these hotels are found in Muscat, the capital when the rest are located in other cities such as Salalah. Most of the visitors to Oman did not use just one type of accommodation infrastructure during their stay. Depending on the sites visited, those visitors were lodged in a variety of accommodation establishments and categories ranging from 5-star hotels through to guesthouses and hostels to campsites and homestays. While 85% of the visitors stayed at the well-known hotels (4 or 5-star) during their visits to Oman, see Table 6.2, 15% had preferred to stay at others, which are not ranked within the top established and well-known hotels and resorts.

Finally, travel budgets need to cover the costs of accommodation, transportation, shopping and entertainment expenses, and others. The results constituted different budgets; most of the respondents (34%) had a travel budget between OMR 200-500 (€400-1000). This might be related to their staying in cheaper places or friends, whilst more than 20% had budgeted more than OMR 1000 (more than €2000). They might prefer to stay at luxury hotels and resorts, as shown in Table 6.2. Moreover, most of the respondents are full-time employees, and they might have saved money for a luxury trip or extended stay. Those who spent less than OMR 200 (less than €400) might be on a short visit to Oman.

Table 6.2 Visitors' trip characteristics

Trip/Travel Characteristics	Frequency (n = 210)	Percentage (%)
Frequency of the visit to Oman		
First visit	67	31.9
Twice	29	13.8
Three	17	8.1
More than three times	97	46.2
Knowledge about Oman		
I already knew about Oman	74	35.2
Friends and relatives	61	29
International Travel Exhibitions (e.g., WTM, ITB Berlin)	11	5.2
Internet (Travel and Guidance Websites)	17	8.1
Social Media (e.g., Facebook, Tweeter, Instagram)	5	2.4
Travel Agency/ Tour operator	8	3.8
TV/ Radio/ Newspaper/ Magazines	7	3.3
Others		
Purpose of the visit to Oman		
A new destination, have not experienced	28	13.3
Attending a conference, seminar	6	2.9
Leisure (e.g., relaxing and rest, shopping)	25	11.9
Natural resources (e.g., beaches, deserts, mountains)	53	25.2
Official, Business or Professional work	45	21.4
Research/ Field trip	6	2.9

Trip/Travel Characteristics	Frequency (n = 210)	Percentage (%)
Sports and Recreation	3	1.4
Visiting friends and relatives	32	15.2
Others	12	5.7
Mode of Transport		
Air: airlines	165	78.6
Land: car, bus/coach, motorbike, bicycle	39	18.6
Sea: Cruise ship, Own boat	6	2.9
Flying to Oman: Airlines		
Oman Air	68	41.2
Emirates	27	16.4
Qatar Airways	22	13.3
Others	48	29.1
Length of Stay		
Full day	5	2.4
Less than three days	18	8.6
One Week	76	36.2
Fortnight (2 weeks)	35	16.7
More than two weeks	76	36.2
Location of Accommodation		
Hotel and Resorts	81	38.6
Local Hotel Apartment	52	24.8
Family/Friends/Relatives	46	21.9
Camping	5	2.4
Others	26	12.4
Accommodation: Hotels, Resorts, and Hotel Apartments		
Salalah Gardens Hotel	18	22.2
Best Western Premier Muscat	12	14.8
Golden Tulip Seeb Muscat Oman	7	8.6
Other	44	54.4
Travel Budget		
Less than 200 OMR (less than €400)	19	9
200 – 500 OMR (€400-1000)	71	33.8
500 – 750 OMR (€1000-1500)	46	21.9
750 – 1000 OMR (€1500-2000)	37	17.6
More than 1000 OMR (more than 2000)	37	17.6

Note: some percentages are rounded up to the nearest unit.

Source. Visitors' Survey

6.2.3 Visitors' Overall Satisfaction

Visitors' overall satisfaction is an essential factor in the motivation for revisiting a destination. Consistent with the research objective and question (No. 3), this section presents the overall satisfaction of the visitor's responses on the level of satisfaction towards the tourism sector and the probability of revisiting a destination through comparing Oman to neighbouring countries, addressing the quality of tourist products and services, meeting visitors' expectations, obtaining visitor's overall experience, and visitors' likelihood of returning. A 5-point or a 6-point Likert-type rate scale was assigned to each question. Also, it is essential to note that no respondents ticked more than one.

Concerning the level of satisfaction of the respondents about the tourism sector in Oman, Table 6.3 showed that more than 75% of the respondents were satisfied with the level of the sector development process. Even so, about 50% of the respondents saw the need for progress in the sector. This progress could be in tourist infrastructure, marketing and promotional methods, natural and industrial attractions, and entertainment activities. In contrast, 11% of the respondents were dissatisfied with the level of the sector development process. More than 13% of the respondents were unsure. The mean rating of visitors' overall satisfaction (M = 3.89), with a standard deviation (SD = 0.97), showed the responses were consistent, and data was less spread out from the mean. It can therefore be generalized that the visitors to Oman were reasonably satisfied with the development of the tourism sector.

Table 6.3 Level of Satisfaction about the Oman Tourism Sector

To what extent are you satisfied with the level of tourism development in Oman?	*Frequency*	*Percent*
Very Satisfied	55	26.2
Satisfied, with the need for progress	104	49.5
Unsure	28	13.3
Dissatisfied	18	8.6
Very Dissatisfied, nothing has changed	5	2.4
Total	210	100
Mean	3.89	
Standard Deviation	0.97	

Note: a 5-point Likert-type scale: 1 = "Very Dissatisfied" 2 = "Dissatisfied", 3 = "Unsure", 4 = "Satisfied", and 5 = "Very Satisfied"

Table 6.4 showed the distribution of respondents to the statement '*Compared to other GCC Countries (e.g., UAE, Qatar, and Bahrain), Oman as a tourism destination is…*' over different options. The majority of respondents (89%), between high and somewhat, found Oman as a competitive destination compared to neighbouring countries in the region. Moreover, while 13% of the respondents did not see Oman as competitive to others, around 6% of the respondents were not sure (do not know). The mean score (M = 3.56) and standard deviation (1.43) showed that the responses were consistent, and that the data was a bit widespread out from the mean. Again, it can therefore be generalized that the visitors to Oman had a good impression and satisfaction with the Sultanate's ability to compete with others in the region.

Table 6.4 Oman in Comparison to the GCC States

Compared to other GCC Countries (e.g., UAE, Qatar, and Bahrain), Oman as a tourism destination is…	*Frequency*	*Percent*
Highly Competitive	64	30.5
Competitive	66	31.4
Somewhat Competitive	40	19
Not Competitive	16	7.6
Not Competitive at All	12	5.7
Do Not Know	12	5.7
Total	210	100
Mean	3.56	
Standard Deviation	1.43	

Note: a 6-point Likert-type scale: 0 = "Do Not Know", 1 = "Not Competitive at All," and 5 = "Highly Competitive"

As far as the visitor's satisfaction is concerned with the quality of tourist products and services, such as accommodation, transportation, public services, and attractions, Table 6.5 showed that more than 80% of the respondents found the quality of the offered products and services ranged between an excellent and a good level. In comparison, about 15% of the respondents found the quality of the offered products and services either fair or poor. The mean score (M = 3.51) and standard deviation (SD = 1.09) showed the responses were consistent, and data was somewhat spread about the mean, suggesting that the visitors are demanding in terms of quality product and service issues. Therefore, there is a need for close attention to destination facilities and quality issues because any improvement of facilities and operational characteristics in the destination should attract more visitors.

Table 6.5 Quality of Tourist Products and Services

To what extent do you find the quality of the offered products and services such as accommodations, transportation, public services, and attractions?	*Frequency*	*Percent*
Excellent	41	19.5
Very Good	71	33.8
Good	64	30.5
Fair	23	11
Poor	10	4.8
Do Not Know	1	0.5
Total	210	100
Mean	3.51	
Standard Deviation	1.09	

Note: a 6-point Likert-type scale: 0 = "Do Not Know", 1 = "Poor", 2 = "Fair", 3 = "Good", 4 = "Very Good", and 5 = "Excellent"

For a visitor whose expectations of a visit to Oman were met, Table 6.6 illustrates that approximately 74% of the respondents said that Oman met their expectations (39.5% completely, and about 34.3% was for the greater part), while 15% found their visit partially met their expectations. However, only 10% found that the visit did not meet their expectations. Obviously, if an expectation were met or exceeded by the perceived service performance, the visitor would be satisfied. Nevertheless, if the perceived performance does not meet a visitor's expectation, dissatisfaction will result. In this case, most respondents expressed their positive attitudes toward the Sultanate, indicating that they agreed that the development of the sector met their expectations. The mean score (M = 4.00) with a standard deviation (SD = 1.05) showed the responses were consistent, and data was again spread about the mean. It can be generalized that the Sultanate is realistically marketed to visitors where tourist products and services can match and exceed visitor's expectations and result in satisfaction.

Table 6.6 Meeting the Visitor's Expectations

Has your visit to Oman met your expectations?	*Frequency*	*Percent*
Completely	83	39.5
For the greater part	72	34.3
Partly	33	15.7

Not really	18	8.6
Absolutely Not	3	1.4
Do Not Know	1	0.5
Total	210	100
Mean	4.00	
Standard Deviation	1.05	

Note: a 6-point Likert-type scale: 0 = "Do Not Know", 1 = "Absolutely Not", 2 = "Not Really", 3 = "Partly", 4 = "For the great part", and 5 = "Completely"

Visitors are more involved with the destination when they gain pleasure from the travel experience (Yao, 2013). Table 6.7 illustrates visitors' past travel experience in Oman. The results showed that most of the respondents (about 81%) were satisfied with their visit to Oman. However, only 10% of the respondents were dissatisfied with their experience; in addition, 10% were not sure. The mean score (M = 4.14), with a standard deviation (SD = 1.02), showed the responses were consistent, and data was spread about the mean. It can be generalized that visitors tend to give more importance to their overall experience at the destination, which is desirable. Also, visitors' satisfaction can be impacted by a range of tourism experiences, which may be derived from many sources (e.g., accommodation, attractions, entertainment, and others). Moreover, according to Yu and Goulden (2006), understanding visitors' levels of satisfaction with and reaction to their experience in the destination is essential to destination management organizations (DMOs) for improving products and services and effectively promoting target markets for new and repeat tourists. Marketing strategies and promotional activities have to underline the uniqueness of the destination's products and services and make clear the authentic experience that enhances bringing more potential visitors to the destination.

Table 6.7 Visitors' Overall Experience in Oman

How would you rate your overall experience in Oman?	*Frequency*	*Percent*
Very Satisfied	96	45.7
Satisfied	73	34.8
Unsure	21	10
Dissatisfied	16	7.6
Very Dissatisfied	3	1.4
Do Not Know	1	0.5
Total	210	100
Mean	4.14	
Standard Deviation	1.02	

Note: a 6-point Likert-type scale: 0 = "Do Not Know", 1 = "Very Dissatisfied" 2 = "Dissatisfied", 3 = "Unsure", 4 = "Satisfied", and 5 = "Very Satisfied"

The willingness to revisit is intensely associated with the satisfaction level. Table 6.8 showed the relationship between visitors' satisfaction and intention to revisit. While it is true that satisfaction and intention to return are important for tourism, about 80% of the respondents were more likely planning to revisit Oman in the future, followed by 11% of participants were neutral in their choice. Even where the destination fulfils visitors' expectations, they may keep seeking new experiences with different destinations. Therefore, approximately 9% of the respondents chose somewhat unlikely to very unlikely with regards to a return visit to the

Sultanate. They might not be satisfied with the Sultanate's offered tourism products or might prefer a completely new destination and a new experience. The mean score (M = 4.16), with standard deviation (SD = 1.05), showed the responses were consistent, and data was a bit widespread out from the mean. It can be generalized that a positive satisfaction of visitors of the destination links to a chance for repeat visits to the destination and a change in attitude, which are critical issues for attracting and bringing more inbound tourists.

Table 6.8 Likelihood of Returning to the Sultanate of Oman

Are you planning to revisit Oman?	*Frequency*	*Percent*
Extremely likely	102	48.6
Likely	66	31.4
Neutral	23	11
Unlikely	13	6.2
Extremely Unlikely	5	2.4
Do Not Know	1	0.5
Total	210	100
Mean	4.16	
Standard Deviation	1.05	

Note: a 6-point Likert-type scale: 0 = "Do Not Know", 1 = "Extremely Unlikely", 2 = "Unlikely", 3 = "Neutral", 4 = "Likely", and 5 = "Extremely Unlikely"

6.3 FACTOR ANALYSIS FOR THE VISITORS' SATISFACTION VARIABLES

Exploratory factor analysis (EFA) was performed to investigate the visitors' satisfaction towards the development of the tourism sector in Oman. The 20 statements covering the variables in the visitor questionnaire: destination marketing and promotion, tourist products and services, and development of the destination products and services where the visitors can express their opinions were extracted to a five-factor structure.

6.3.1 Visitors' Satisfaction Factors

The five-factors, as illustrated in Table 6.10, were considered to be the most influential factors that belong to the visitors' satisfaction with the development of the Omani tourism sector. They explained 60.77% of the total variance. The KMO (= 0.824) indicates that the sample was large enough to perform factor analysis. In addition, the Bartlett test ($p < .05$) was significant, and therefore factor analysis was appropriate. As illustrated in Figure 6.1, the eigenvalue of the five-component factors was acceptable and valid, higher than 1.0 (see *Table 6.9*). The plot seems to have two inflexion points: one at eigenvalue 2 and the other at eigenvalue 5.

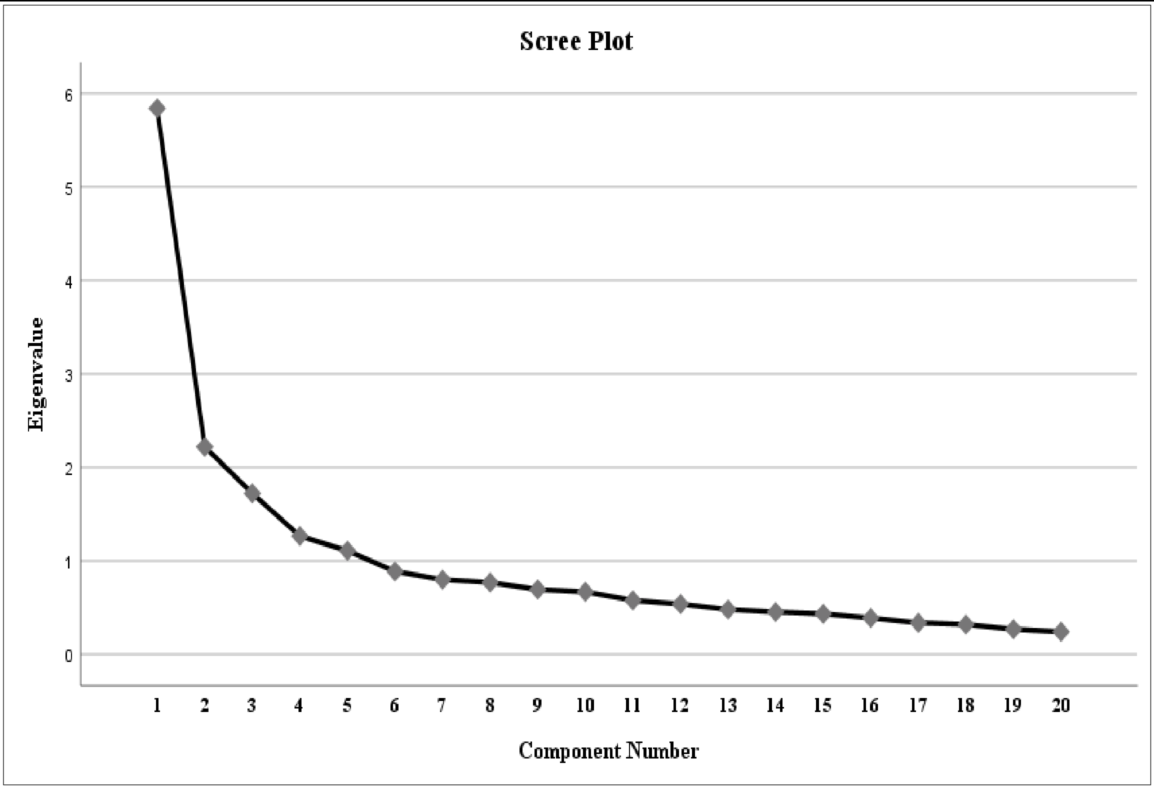

Figure 6.1 Scree Plot: Generated Factor of Visitors' Survey
Source. Visitors' Survey

The study chooses to keep the factors corresponding to eigenvalues, the 5 largest eigenvalues (60.77% of the variance). Factor 1, before rotation, accounted for considerably more variance than the remaining five factors (29.20%). However, after extraction, Factor 1 accounts for only 15.44% of variance compared to the remaining nine factors' high variance. The eigenvalue of the five-component factors was acceptable and valid, which was higher than 1.0. These examinations confirmed the appropriateness of carrying further factor analysis. The loading and percentage overlapping variance of a total of 18 satisfaction statements were reduced into a manageable number of factors (loadings of greater than 0.5).

Table 6.9 Factor Analysis (Visitors): Total Variance Explained

Total Variance Explained

Component	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	5.842	29.208	29.208	5.842	29.208	29.208	3.090	15.449	15.449
2	2.219	11.096	40.304	2.219	11.096	40.304	2.684	13.419	28.868
3	1.722	8.609	48.914	1.722	8.609	48.914	2.255	11.276	40.144
4	1.265	6.325	55.238	1.265	6.325	55.238	2.085	10.423	50.567
5	1.107	5.535	60.773	1.107	5.535	60.773	2.041	10.206	60.773

Extraction Method: Principal Component Analysis.

Source. Visitors' Survey

Factor 1: "*Destination Marketing Activities and Promotional Methods"* explained 29.20% of the total variance, was defined as "marketing and promotion-related satisfaction," including the statements (loading above 0.5) regarding the respondents' interest in the way the destination presented its tourism activities and attractions, and capitalized on the technology (such as social media) for attracting visitors. Also, the factor concerns the importance of marketing campaigns and exhibitions, promotional methods in presenting the image of the Sultanate internationally, the effectiveness of social media programs in promoting the Sultanate globally, and finally, branding Oman as a tourism destination through its tourist products and services regionally and internationally.

Factor 2: "*Development of Tourism Destination (Tourist) Infrastructure*" loading explained 11.09% of the total variance. The factor includes 5 statements considered moderate statements (loading above 0.5). These statements are related to visitors' concern over the development in the destination's transportation sector, high-quality public services, MICE tourism, and accommodation.

Factor 3 deals with the *Development of Destination Resources (Natural and Human-Made)* that explained 8.60% of the total variance. The factor consisted of 4 statements (loading larger than 0.5) and considered the development of natural resources and cultural and historical attractions.

Factor 4 deals with issues concerning '*Quality and Variety of Tourist Products and Services.'* This factor is the second important of the 5 extracted components and explains 6.32% of the total variance. Three statements (loading larger than 0.5) were the reasonable and affordable prices of the provided products and services to the visitors, the availability and accessibility of the tourism products and services for the visitors, the match between the tourist's expectations and demands, and the quality and variety of existing products and services.

Factor 5 includes 3 statements, which indicate the "*Uniqueness and Competitiveness of the Destination Resources and Activities"* in the development of the sector. It explained the most significant percentage of the total variance; (5.53%). Therefore, it is the most important in determining the significance of the variables. In this factor, statements considered items (loading greater than 0.5) that Oman offers a wide range of activities for visitors' involvement, and the uniqueness and difference of the destination attractions and amenities compared to other destinations in the region.

Table 6.10 Results of Factor Analysis of Visitors' Satisfaction

Satisfaction Factors and Items	**Factors Loadings**				
	1	2	3	4	5
Factor 1: Destination Marketing Activities and Promotional Methods					
4.6 Tourism exhibitions have played a vital role in branding Oman regionally and internationally.	0.748				
4.7 Popular festivals and events like Khareef Salalah, Muscat Festivals, and Oman Tour are the main reasons for visiting Oman.	0.695				
3.2 Tourism in Oman has been promoted through marketing campaigns and exhibitions to present the image of the Sultanate internationally.	0.672				
3.4 Social media platforms such as Facebook, Twitter, and Instagram have been effective in promoting the Sultanate globally.	0.664				
3.1 Oman is a well-known tourism destination brand, which reflects its culture, heritage, and natural resources through its tourism products and services (e.g., hotels, restaurants, shopping malls).	0.593				
Factor 2: Development of Tourism Destination (Tourist) Infrastructure					
5.8 Developing the transportation sector by having more flights, connections with more destinations, and strong road connections in the country.		0.747			
5.9 Developing the country's infrastructure and superstructure through high-quality public services (utilities, telecommunication)		0.700			
5.7 Developing accommodation sectors through building more hotels, resorts, hotel apartments)		0.657			
5.4 Developing business and convention events (e.g., festivals, exhibitions)		0.582			
Factor 3: Development of Destination Resources (Natural and Human-Made)					
5.2 Developing cultural and historical attractions (e.g., forts and castles, arts, museums, traditional cultural)			0.768		
5.1 Developing natural resources (e.g., deserts, beaches, springs, caves)			0.764		
5.3 Developing visitor-supporting services (e.g., hotels, resorts, restaurant, shopping malls)			0.594		
Factor 4: Quality and Variety of Tourist Product and Services					
4.2 The prices of the provided products and services (hotels, restaurants, shopping malls) are reasonable and affordable for the visitor.				0.772	
4.3 The products and services (hotels, restaurants, and shopping malls) are available and accessible to tourists.				0.768	
4.1 The quality and variety of existing products and services (hotels, restaurants, and shopping malls) are matching with the tourist's expectations and demands (needs).				0.537	
Factor 5: Uniqueness and Competitiveness of the Destination Resources and Activities					
4.5 The attractions (natural and human-made) and amenities (hotels, resorts) are unique and different compared to other destinations in the GCC States.					0.755
4.4 Oman as a tourism destination, offers a wide range of activities (nature, adventures, festivals) in which the tourist is able to engage.					0.741
3.3 Visitor's demands have been taken into high consideration in all areas of its operations (accommodation, public transport, tourist attractions)					0.522
Mean (M)	3.31	3.41	3.69	3.59	3.71
Standard Deviation (SD)	1.45	1.31	1.23	1.12	1.24
Eigenvalues	5.84	2.21	1.72	1.26	1.10
Variance (%)	29.20	11.09	8.60	6.32	5.53
Cumulative Variance (%)	29.20	40.30	48.91	55.23	60.77

Satisfaction Factors and Items	**Factors Loadings**				
	1	2	3	4	5
Reliability Alpha	0.761	0.736	0.739	0.721	0.706
Number of Statements (total 20)	5	4	3	3	3

Note: A 5-point Likert-type scale: 1 = "Strongly Disagree" and 5 = "Strongly Agree

Source. Visitors' Survey

The results showed that the most satisfactory factor was the uniqueness and competitiveness of the destination resources and activities (M = 3.71), while the least satisfactory factor was the destination marketing activities and promotional methods (M = 3.31). Hence, the overall mean and standard deviation scores of all four statements were M = 3.54, SD = 1.18. Using the standard deviation empirical rule (68-95-99.7), 95% of overall mean scores are spread out between 2.36 to 4.72, meaning that 14% of visitors valued the five-factors of satisfaction about the mean between 3.54 to 4.72 and another 14% valued below the mean scores between 2.36 to 3.54 with two standard deviations. This notion does reflect that visitors' satisfaction is influenced by the factors mentioned above. The overall factors were within the range between "Agreed and Strongly Agreed."

Furthermore, reliability analysis was conducted for the five factors and resulted between 0.761and 0.706. The acceptance level of the reliability coefficient was above 0.70 or higher, which was acceptable on the scale reliability. As shown in Table 6.10, the alpha coefficient for all items (statements), by section, ranged as; 0.761 (Factor 1 = 5 items), 0.736 (Factor 2 = 5 items), 0.739 (Factor 3 = 4 items), 0.721 (Factor 4 = 3 items), and 0.706 (Factor 5 = 3 items). The values showed good scores (between 0.70 and near 0.90).

6.3.2 Visitors' Satisfaction Factors: Analysis of Independence Relationship

The Chi-Square test was undertaken to identify the relationship and the significant differences in satisfaction levels between between the demographic variable, travel companion, and the generated factors from factor analysis with a 0.05 level of the significance covering the dimensions: destination marketing and promotion, tourist products and services, and development of destination products and services.

6.3.2.1 Destination Marketing Activities and Promotional Methods and Visitors' Travel Companion(s)

The relationship between the variables, destination marketing activities, promotional methods, and the visitors' travel companion(s) was addressed in five statements, as shown in Table 6.11. The majority of respondents were solo travellers (21%) who agreed with statement 3.1 (M = 3.63, SD = 1.21) that Oman is a well-known tourism destination brand through its tourism products and services. This indicates the importance of destination branding in attracting visitors, solo travellers in particular. In statement 3.2 (M = 3.61, SD = 1.28), the results showed that the respondents who agreed that Oman had been promoted through marketing campaigns and exhibitions to present the image of the Sultanate internationally were solo travellers with about 23% of the total respondents. This indicates the importance of destination marketing campaigns and exhibitions to solo visitors. Surprisingly, statement 3.4 (M = 3.25, SD = 1.31) showed that nearly 18% of the solo traveller respondents were agreed that social media platforms such as Facebook, Twitter, and Instagram have been effective in promoting the Sultanate globally. This indicates the importance of social media platforms in promoting the Sultanate globally to solo visitors. However, nearly 15% of the respondents, solo travellers, were neutral on the statement. The effectiveness of social media was significantly smaller than other statements. This confirms the results in section 6.1.2 that knowledge about Oman using social media is not well utilized in marketing and promoting the Sultanate. Moreover, 19.1%, the majority of the respondents who were solo travellers agreed on statement 4.6 (M = 3.13, SD = 1.54), that tourism exhibitions have played a vital role in branding Oman regionally and internationally. The next largest group (around 10%) were families with children who also agreed to the statement. This indicates the vital role of tourism exhibitions in branding Oman regionally and internationally with amenities to the visitors: solo travellers and families with children. Approximately 10%, the majority of the respondents who were solo travellers disagreed to the statement, 4.7 (M = 2.95, SD = 1.90), where popular festivals and events are the main reasons for visiting Oman. However, the next largest group (11%) families with children agreed with the statement. This indicates that popular festivals and events are not the main reasons for visiting Oman.

The overall mean and standard deviation scores of all five statements were: M = 3.31, SD = 1.45. Using the standard deviation empirical rule (68-95-99.7), 95% of overall mean scores lie between 1.86 to 4.76, meaning that 14% of respondents valued destination marketing and promotion about the mean between 3.31 to 4.76, and another 14% valued below the mean scores between 2.30 to 3.31 with two standard deviations. This notion does reflect that visitors' satisfaction is influenced by destination marketing and promotion. The overall statements were within the range between "Neutral and Agreed."

The results revealed that most of the participants were solo travellers, who were mostly on holiday, and they were satisfied with the sectors marketing activities and promotional methods. Regarding the analysis of independence, the p-values of the 5 statements were not less than the significance level of 0.05. This means there is no sufficient evidence that there is a dependant relationship between the demographic variable, travel companion, and destination marketing activities and promotional methods.

Table 6.11 Relationship between Destination Marketing Activities and Promotional Methods and Visitors' Travel Companion

Statements			Whom do you travel with to Oman? (Travel Companion)					Total
			Solo Traveller	**Couple**	**Family with Children**	**Friends**	**Group of Tourists**	
3.1 Oman is a well-known tourism destination brand through its tourism products and services.	Agree	Respondents	**44**	26	36	19	7	132
		%	**21%**	12.40%	17.10%	9.00%	3.40%	62.90%
	Neutral	Respondents	14	8	6	2	3	33
		%	6.7%	3.8%	2.9%	1.0%	1.4%	15.7%
	Disagree	Respondents	17	8	15	4	0	44
		%	8.10%	3.80%	7.10%	1.90%	0.00%	20.90%
	Do Not Know	Respondents	1	0	0	0	0	1
		%	0.5%	0.0%	0.0%	0.0%	0.0%	0.5%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			16.296a	20	**0.698**	0.279	0.139	0.268
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .05.							
3.2 Tourism in Oman has been promoted through marketing campaigns and exhibitions to present the image of the Sultanate internationally.	Agree	Respondents	**48**	25	30	14	5	122
		%	**22.80%**	11.90%	14.20%	6.70%	2.40%	58%
	Neutral	Respondents	16	11	14	9	2	52
		%	7.6%	5.2%	6.7%	4.3%	1.0%	24.8%
	Disagree	Respondents	10	4	11	1	3	29
		%	4.80%	1.90%	5.20%	0.50%	1.40%	13.80%
	Do Not Know	Respondents	2	2	2	1	0	7
		%	1.0%	1.0%	1.0%	0.5%	0.0%	3.3%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			24.497a	20	**0.221**	0.342	0.171	0.323
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .29.							
3.4 Social media platforms such as Facebook, Twitter, and Instagram have been effective in promoting the Sultanate globally.	Agree	Respondents	**37**	19	23	14	3	96
		%	**17.60%**	9.10%	10.90%	6.70%	1.50%	45.80%
	Neutral	Respondents	22	12	15	5	4	58
		%	10.5%	5.7%	7.1%	2.4%	1.9%	27.6%
	Disagree	Respondents	15	7	18	4	3	47
		%	7.20%	3.40%	8.60%	1.90%	1.50%	22.60%
	Do Not Know	Respondents	2	4	1	2	0	9
		%	1.0%	1.9%	0.5%	1.0%	0.0%	4.3%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			18.993a	20	**0.522**	0.301	0.150	0.288
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .43.							
4.6 Tourism exhibitions have played a vital role in branding Oman regionally and internationally.	Agree	Respondents	**40**	15	29	12	3	99
		%	**19.10%**	7.10%	13.80%	5.70%	1.50%	47.20%
	Neutral	Respondents	16	14	9	8	5	52
		%	7.6%	6.7%	4.3%	3.8%	2.4%	24.8%
	Disagree	Respondents	11	6	15	4	2	38
		%	5.20%	2.90%	7.20%	1.90%	1.00%	18.20%
	Do Not Know	Respondents	9	7	4	1	0	21
		%	4.3%	3.3%	1.9%	0.5%	0.0%	10.0%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			29.255a	20	**0.083**	0.373	0.187	0.350
	a. 13 cells (43.3%) have expected count less than 5. The minimum expected count is .67.							
4.7 Popular festivals and events like Khareef Salalah, Muscat Festivals, and Oman	Agree	Respondents	26	14	**31**	11	4	86
		%	12.40%	6.70%	**14.80%**	5.30%	1.90%	41.10%
	Neutral	Respondents	16	12	8	3	1	40
		%	7.6%	5.7%	3.8%	1.4%	0.5%	19.0%

Statements			Whom do you travel with to Oman? (Travel Companion)					Total
			Solo Traveller	Couple	Family with Children	Friends	Group of Tourists	
Tour are the main reasons for visiting Oman.	Disagree	Respondents	**30**	12	16	8	5	71
		%	**14.30%**	5.80%	7.70%	3.90%	2.40%	34.10%
	Do Not Know	Respondents	4	4	2	3	0	13
		%	1.9%	1.9%	1.0%	1.4%	0.0%	6.2%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		Value	df	Asymp. Sign.	Phi	Cramer's V	Contingency Coefficient
			19.489a	20	**0.490**	0.305	0.152	0.291
	a. 14 cells (46.7%) have expected count less than 5. The minimum expected count is .62.							

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

6.3.2.2 Development of Destination (Tourist) Infrastructure and Visitors' Travel Companion(s)

Concerning the relationship between the variables: *development of destination (tourist) infrastructure, and the visitors' travel companion(s),* the largest group (approx. 17%) of respondents who were solo travellers found developing business, and convention events statement 5.4 (M = 3.07, SD = 1.49) as essential. 17.2% of respondents, solo travellers, found statement 5.5 (M = 3.30, SD = 1.29) that developing sports activities lay between a high and medium priority. About 21% of the solo travellers, most respondents, viewed statement 5.7 (M = 3.46, SD = 1.33) that developing accommodation sectors through building more hotels, resorts, hotel apartments as a high priority. Approximately 32%, the majority of the solo travel respondents found statement 5.8 (M = 3.70, SD = 1.15) that developing the transportation sector through more flights, connections with more destinations, and strong road connections as a high priority. Finally, 22.4%, the majority of the respondents agreed on statement 5.9 (M = 3.55, SD = 1.27) that developing the country's infrastructure and superstructure through high-quality public services as a high priority.

The overall mean and standard deviation scores of all five statements were; M = 3.41, SD = 1.31, as shown in Table 6.12. About 95% of respondents considered the development of destination (tourist) infrastructure and scored between 2.10 and 4.72. Another 14% of respondents valued the development of destination (tourist) infrastructure below 2.10 and above 4.72 with two standard deviations. This view reflects that the development of the sector infrastructure and services (facilities) also plays an influence on visitors' satisfaction. The overall statements were within the range *"High Priority and Essential."*

The results revealed that most of the participants were solo travellers, and they were not satisfied with the development of the destination (tourist) infrastructure. The p-values of the five statements were not less than the significance level of 0.05. This means that there is no sufficient evidence that there is a dependant relationship between the demographic variable, travel companion, and the development of destination (tourist) infrastructure.

Table 6.12 Relationship between Development of Destination (Tourist) Infrastructure and Visitors' Travel Companion

Statements			To what extent are you satisfied with the level of tourism development in Oman?					Total
			Solo Traveller	**Couple**	**Family with Children**	**Friends**	**Group of Tourists**	
5.4 Developing business and convention events (e.g., festivals, exhibitions)	Essential	Respondents	**35**	17	27	14	4	97
		%	**16.60%**	8.10%	12.80%	6.70%	1.90%	46.10%
	Medium Priority	Respondents	31	17	21	6	6	81
		%	14.80%	8.10%	10.00%	2.90%	2.90%	38.70%
	Not a priority	Respondents	4	0	6	1	0	11
		%	1.9%	0.0%	2.9%	0.5%	0.0%	5.2%
	Do Not Know	Respondents	6	8	3	4	0	21
		%	2.9%	3.8%	1.4%	1.9%	0.0%	10.0%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			25.109a	20	**0.197**	0.346	0.173	0.327
	a. 14 cells (46.7%) have expected count less than 5. The minimum expected count is .52.							
5.5 Developing sports activities (e.g., hiking, football matches, sailing, fishing)	Essential	Respondents	33	23	28	13	4	101
		%	15.80%	11.00%	13.30%	6.20%	2.00%	48.30%
	Medium Priority	Respondents	**36**	17	21	8	6	88
		%	**17.20%**	8.10%	10.00%	3.90%	2.90%	42.10%
	Not a priority	Respondents	4	2	6	1	0	13
		%	1.9%	1.0%	2.9%	0.5%	0.0%	6.2%
	Do Not Know	Respondents	3	0	2	3	0	8
		%	1.4%	0.0%	1.0%	1.4%	0.0%	3.8%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			18.765a	20	**0.537**	0.299	0.149	0.286
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .38.							
5.7 Developing accommodation sectors through building more hotels, resorts, hotel apartments.	Essential	Respondents	**44**	19	38	14	4	119
		%	**20.90%**	9.10%	18.10%	6.70%	1.90%	56.70%
	Medium Priority	Respondents	26	20	12	7	4	69
		%	12.40%	9.60%	5.80%	3.40%	2.00%	33.20%
	Not a priority	Respondents	6	1	3	2	2	14
		%	2.9%	0.5%	1.4%	1.0%	1.0%	6.7%
	Do Not Know	Respondents	0	2	4	2	0	8
		%	0.0%	1.0%	1.9%	1.0%	0.0%	3.8%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			24.272a	20	**0.231**	0.340	0.170	0.322
	a. 15 cells (50.0%) have expected count less than 5. The minimum expected count is .38.							
5.8 Developing the transportation sector by having more flights, connections with more destinations, and strong road connections in the country.	Essential	Respondents	**48**	30	38	16	5	137
		%	**22.90%**	14.30%	18.10%	7.60%	2.40%	65.30%
	Medium Priority	Respondents	27	10	16	6	4	63
		%	12.80%	4.70%	7.60%	2.90%	1.90%	29.90%
	Not a priority	Respondents	0	2	2	0	1	5
		%	0.0%	1.0%	1.0%	0.0%	0.5%	2.4%
	Do Not Know	Respondents	1	0	1	3	0	5
		%	0.5%	0.0%	0.5%	1.4%	0.0%	2.4%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			24.334a	20	**0.228**	0.340	0.170	0.322

Statements			To what extent are you satisfied with the level of tourism development in Oman?					Total
			Solo Traveller	Couple	Family with Children	Friends	Group of Tourists	
	a. 17 cells (56.7%) have expected count less than 5. The minimum expected count is .24.							
5.9 Developing the country's infrastructure and superstructure through high-quality public services (utilities, telecommunication)	Essential	Respondents	**47**	30	32	14	4	127
		%	**22.40%**	14.30%	15.20%	6.70%	2.00%	60.60%
	Medium Priority	Respondents	23	9	21	10	6	69
		%	11.00%	4.30%	10.00%	4.80%	2.80%	32.90%
	Not a priority	Respondents	2	1	2	0	0	5
		%	1.0%	0.5%	1.0%	0.0%	0.0%	2.4%
	Do Not Know	Respondents	4	2	2	1	0	9
		%	1.9%	1.0%	1.0%	0.5%	0.0%	4.3%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		Value	df	Asymp. Sign.	Phi	Cramer's V	Contingency Coefficient
			14.133a	20	**0.824**	0.259	0.130	0.251
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .24.							

Note: a 5-point Likert-type scale: 5 = Essential, 4 = High Priority, 3 = Medium Priority, 2 = Low Priority, 1 = No Priority, 0 = Do Not Know

6.3.2.3 Destination Resources and Visitors' Travel Companion(s)

Regarding the relationship between the variables: *development of destination resources (natural and human-made), and travel companion(s)*, 24.3% of respondents who were solo travellers indicated 'essential' in developing natural resources, statement 5.1 (M = 3.72, SD = 1.21). Concerning statement 5.2 (M = 3.82, SD = 1.12), developing cultural and historical attractions, 28.1% of the respondents, solo travellers indicated the 'high priority' in developing attractions, as shown in Table 6.13. More so, just 21% of the respondents, solo travellers, emphasized the importance of developing visitor-supporting services, statement 5.3 (M = 3.55, SD = 1.19). 24.3% of the majority of respondents, solo travellers, believed that developing access procedures, safety, and security programs, statement 5.6 (M = 3.67, SD = 1.39), was a high priority.

The overall mean and standard deviation scores of all four statements were M = 3.69, SD = 1.23. About 95% of respondents considered the development of destination resources (natural and human-made) scores between 2.46 and 4.92. Another 14% of respondents valued the development of destination resources (natural and human-made) below 2.46 and above 4.92 with two standard deviations. This view does reflect the development of destination resources (natural and human-made), which also influences visitors' satisfaction. The overall statements were within the range between *"High Priority and Essential."*

The results revealed that most of the participants were solo travellers, and they were not satisfied with the development of destination resources (natural and human-made). The p-values of the 4 statements were not less than the significant level of 0.05. This means there is no sufficient evidence that there is a dependence relationship between the demographic variable, travel companion, and development of destination resources (natural and human-made).

Table 6.13 Relationship between Development of Destination Resources and Visitors’ Travel Companion

Statements			**To what extent are you satisfied with the level of tourism development in Oman?**					**Total**
			Solo Traveller	**Couple**	**Family with Children**	**Friends**	**Group of Tourists**	
5.1 Developing natural resources (e.g. deserts, beaches, springs, caves)	Essential	Respondents	**51**	26	36	15	5	133
		%	**24.30%**	12.40%	17.20%	7.10%	2.40%	63.40%
	Medium Priority	Respondents	20	14	17	9	3	63
		%	9.50%	6.70%	8.10%	4.30%	1.40%	30.00%
	Not a priority	Respondents	1	1	2	1	2	7
		%	0.5%	0.5%	1.0%	0.5%	1.0%	3.3%
	Do Not Know	Respondents	4	1	2	0	0	7
		%	1.9%	0.5%	1.0%	0.0%	0.0%	3.3%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer’s V**	**Contingency Coefficient**
			17.010a	20	**0.652**	0.285	0.142	0.274
	a. 18 cells (60.0%) have expected count less than 5. The minimum expected count is .33.							
5.2 Developing cultural and historical attractions (e.g., forts and castles, arts, museums, traditional cultural)	Essential	Respondents	**59**	26	38	19	7	149
		%	**28.10%**	12.30%	18.10%	9.10%	3.30%	70.90%
	Medium Priority	Respondents	16	12	16	6	3	53
		%	7.60%	5.70%	7.60%	2.80%	1.50%	25.20%
	Not a priority	Respondents	0	3	2	0	0	5
		%	0.0%	1.4%	1.0%	0.0%	0.0%	2.4%
	Do Not Know	Respondents	1	1	1	0	0	3
		%	0.5%	0.5%	0.5%	0.0%	0.0%	1.4%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer’s V**	**Contingency Coefficient**
			17.821a	20	**0.599**	0.291	0.146	0.280
	a. 17 cells (56.7%) have expected count less than 5. The minimum expected count is .14.							
5.3 Developing visitor-supporting services (e.g. hotels, resorts, restaurant, shopping malls)	Essential	Respondents	**44**	23	35	13	3	118
		%	**21%**	10.90%	16.60%	6.20%	1.50%	56.20%
	Medium Priority	Respondents	29	17	14	10	7	77
		%	13.80%	8.10%	6.70%	4.80%	3.40%	36.80%
	Not a priority	Respondents	2	2	7	2	0	13
		%	1.0%	1.0%	3.3%	1.0%	0.0%	6.2%
	Do Not Know	Respondents	1	0	1	0	0	2
		%	0.5%	0.0%	0.5%	0.0%	0.0%	1.0%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer’s V**	**Contingency Coefficient**
			21.978a	20	**0.342**	0.324	0.162	0.308
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .10.							
5.6 Developing access procedures (e.g., visas), safety, and security programs (e.g., preventing robbery, bribes)	Essential	Respondents	**51**	26	41	18	5	141
		%	**24.30%**	12.40%	19.50%	8.60%	2.40%	67.20%
	Medium Priority	Respondents	20	11	7	7	4	49
		%	9.50%	5.20%	3.30%	3.40%	2.00%	23.40%
	Not a priority	Respondents	2	1	6	0	1	10
		%	1.0%	0.5%	2.9%	0.0%	0.5%	4.8%
	Do Not Know	Respondents	3	4	3	0	0	10
		%	1.4%	1.9%	1.4%	0.0%	0.0%	4.8%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer’s V**	**Contingency Coefficient**
			20.497a	20	**0.427**	0.312	0.156	0.298
	a. 17 cells (56.7%) have expected count less than 5. The minimum expected count is .48.							

Note: a 5-point Likert-type scale: 5 = Essential, 4 = High Priority, 3 = Medium Priority, 2 = Low Priority, 1 = No Priority, 0 = Do Not Know

6.3.2.4 Quality and Variety of Tourist Products and Services and Visitors' Travel Companion(s)

Regarding the relationship between quality and variety of tourist products and services, and the visitors' travel companion, approximately 26% of the respondents, solo travellers, agreed on statement 4.1 (M = 3.62, SD = 1.23), the quality and variety of existing products and services are matching with the tourist's expectations and demands. Also, as shown in Table 6.14, promotional material (advertising) was viewed before a visit to the Sultanate, which matched the visitors' experience of the Sultanate tourism products and services. The next largest group (approx. 16%) was family with children who also agreed with the statement. This indicates the importance of the quality and variety of tourism products and services to match the tourist's expectations and demands. The results showed that both 18.1% of the solo traveller respondents as well as 15.2% of the respondents, family with children, agreed that the prices of the provided products and services are reasonable and affordable for the visitor, statement 4.2 (M = 3.36, SD 1.14). However, some of the visitors were neutral about travel-related prices being expensive, and others thought that travel prices in Oman were high. Just 29%, the majority of the respondents who were solo travellers agreed on statement 4.3 (M = 3.80, SD = 1.01) that the products and services are available and accessible to tourists.

The overall mean and standard deviation scores of all three statements were M = 3.59, SD = 1.12. About 95% of respondents considered quality and variety of tourist products and services scores between 2.47 and 4.71. Another 14% of respondents valued the quality and variety of tourist products and services below 2.47 and above 4.71 with two standard deviations. This view does reflect that the quality and variety of tourist products and services influence visitors' satisfaction. The overall statements were within the range between "Neutral and Agreed."

The results revealed that both solo travellers and families with children were satisfied with the quality and variety of tourist products and services. Regarding the p-values of the three statements, the results showed no less than the significance level of 0.05. In this regard, there is no sufficient evidence that there is a dependence relationship between the variable, travel companion, and quality and variety of tourist products and services.

Table 6.14 Relationship between Quality and Variety of Tourist Products and Services and Visitors' Travel Companion

Statements			Whom do you travel with to Oman? (Travel Companion)					Total
			Solo Traveller	**Couple**	**Family with Children**	**Friends**	**Group of Tourists**	
	Agree	Respondents	**54**	25	33	18	4	134

Statements			Whom do you travel with to Oman? (Travel Companion)					Total
			Solo Traveller	Couple	Family with Children	Friends	Group of Tourists	
4.1 The quality and variety of existing products and services (hotels, restaurants, shopping malls) are matching with the tourist's expectations and demands (needs).		%	**25.70%**	11.90%	15.70%	8.60%	1.90%	63.80%
	Neutral	Respondents	13	11	10	3	2	39
		%	6.2%	5.2%	4.8%	1.4%	1.0%	18.6%
	Disagree	Respondents	8	6	14	4	4	36
		%	3.80%	2.90%	6.60%	1.90%	1.90%	17.10%
	Do Not Know	Respondents	1	0	0	0	0	1
		%	0.5%	0.0%	0.0%	0.0%	0.0%	0.5%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			21.823a	20	**0.350**	0.322	0.161	0.307
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .05.							
4.2 The prices of the provided products and services (hotels, restaurants, shopping malls) are reasonable and affordable for the visitor.	Agree	Respondents	**38**	23	32	14	4	111
		%	**18.10%**	11.00%	15.20%	6.70%	1.90%	52.90%
	Neutral	Respondents	14	9	14	5	5	47
		%	6.7%	4.3%	6.7%	2.4%	2.4%	22.4%
	Disagree	Respondents	23	10	11	6	1	51
		%	11.00%	4.80%	5.20%	2.90%	0.50%	24.40%
	Do Not Know	Respondents	1	0	0	0	0	1
		%	0.5%	0.0%	0.0%	0.0%	0.0%	0.5%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			21.492a	20	**0.369**	0.320	0.160	0.305
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .05.							
4.3 The products and services (hotels, restaurants, shopping malls) are available and accessible to tourists.	Agree	Respondents	**61**	30	42	17	6	156
		%	**29.10%**	14.30%	20%	8.10%	2.90%	74.40%
	Neutral	Respondents	9	7	8	5	0	29
		%	4.3%	3.3%	3.8%	2.4%	0.0%	13.8%
	Disagree	Respondents	6	5	6	3	4	24
		%	2.90%	2.40%	2.90%	1.40%	2.00%	11.60%
	Do Not Know	Respondents	0	0	1	0	0	1
		%	0.0%	0.0%	0.5%	0.0%	0.0%	0.5%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			21.078a	20	**0.393**	0.317	0.158	0.302
	a. 17 cells (56.7%) have expected count less than 5. The minimum expected count is .05.							

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

6.3.2.5 Uniqueness and Competitiveness of the Destination Resources and Activities and Visitors' Travel Companion(s)

Finally, the relationship between uniqueness and competitiveness of the destination resources and activities, and the visitors' travel companion(s), was addressed in three statements (see *Table 6.15*). About 24% of the majority of respondents, solo travellers, agreed on statement 3.3 (M = 3.61, SD = 1.12) that visitor's demands had been taken into high consideration in all areas of its operations (accommodation, public transport, tourist attractions). This indicated high satisfaction with the Sultanate's promotion (image and branding). Also, approximately 29% of the respondents', who were solo travellers, agreed to statement 4.4 (M = 3.83, SD =

1.26) that Oman, as a tourism destination, offers a wide range of activities in which the tourist is able to engage. Approximately 19% of the respondents, who were families with children agreed with the statement as well. About 27%, the majority of the respondents, who were solo travellers, strongly agreed to statement 4.5 (M = 3.70, SD = 1.35) that the attractions (natural and human-made) and amenities are unique and different compared to other destinations in the GCC States while the next largest group, (approx. 18%) families with children only agreed.

The overall mean and standard deviation scores of all three statements were M = 3.71, SD = 1.24. About 95% of respondents considered the uniqueness and competitiveness of the destination resources and activities scores between 2.47 and 4.95. Another 14% of respondents valued quality and variety of uniqueness and competitiveness of the destination resources and activities below 2.47 and above 4.95 with two standard deviations. This view does reflect that the uniqueness and competitiveness of the destination resources and activities influence visitors' satisfaction. The overall statements were within the range between "Neutral and Agreed."

The results revealed that both solo travellers and families with children were satisfied with the uniqueness and competitiveness of the destination resources and activities. Regarding the p-values of the three statements, the results showed less than the significance level of 0.05, except in statements 3.3. The statements 4.4 and 4.5 were more focused on the tourist involvement within the sector, which offered activities and the uniqueness of the attractions of Oman compared to neighbouring destinations. In this regard, there is sufficient evidence that there is a dependant relationship between the demographic variable, travel companion, and uniqueness and competitiveness of the destination resources and activities.

Table 6.15 Relationship between Uniqueness and Competitiveness of Destination Resources and Activities and Visitors' Travel Companion

Statements			**Whom do you travel with to Oman? (Travel Companion)**					**Total**
			Solo Traveller	**Couple**	**Family with Children**	**Friends**	**Group of Tourists**	
3.3 Visitor's demands have been taken into high consideration in all areas of its operations (accommodation, public transport, tourist attractions).	Agree	Respondents	**51**	27	34	15	6	133
		%	**24.30%**	12.90%	16.20%	7.20%	2.90%	63.50%
	Neutral	Respondents	18	9	10	3	2	42
		%	8.6%	4.3%	4.8%	1.4%	1.0%	20.0%
	Disagree	Respondents	7	6	12	7	2	34
		%	3.40%	2.90%	5.70%	3.30%	1.00%	16.30%
	Do Not Know	Respondents	0	0	1	0	0	1
		%	0.0%	0.0%	0.5%	0.0%	0.0%	0.5%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency**

Statements			Whom do you travel with to Oman? (Travel Companion)					Total
			Solo Traveller	**Couple**	**Family with Children**	**Friends**	**Group of Tourists**	
								Coefficient
			22.748a	20	**0.301**	0.329	0165	0.313
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .05.							
4.4 Oman, as a tourism destination, offers a wide range of activities (nature, adventures, festivals) in which the tourist is able to engage.	Agree	Respondents	**60**	35	39	14	2	150
		%	**28.60%**	16.60%	18.60%	6.70%	1.00%	71.50%
	Neutral	Respondents	8	4	5	6	2	25
		%	3.8%	1.9%	2.4%	2.9%	1.0%	11.9%
	Disagree	Respondents	5	2	13	5	6	31
		%	2.40%	1.00%	6.20%	2.40%	2.90%	14.90%
	Do Not Know	Respondents	3	1	0	0	0	4
		%	1.4%	0.5%	0.0%	0.0%	0.0%	1.9%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			58.859a	20	**0.000**	0.529	0.265	0.468
	a. 17 cells (56.7%) have expected count less than 5. The minimum expected count is .19.							
4.5 The attractions (natural and human-made) and amenities (hotels, resorts) are unique and different compared to other destinations in the GCC States.	Agree	Respondents	**56**	29	37	17	3	142
		%	**26.70%**	13.80%	17.60%	8.10%	1.50%	67.70%
	Neutral	Respondents	9	7	5	2	2	25
		%	4.3%	3.3%	2.4%	1.0%	1.0%	11.9%
	Disagree	Respondents	7	5	14	5	5	36
		%	3.40%	2.40%	6.70%	2.40%	2.40%	17.30%
	Do Not Know	Respondents	4	1	1	1	0	7
		%	1.9%	0.5%	0.5%	0.5%	0.0%	3.3%
	Total	Respondents	76	42	57	25	10	210
		%	36.2%	20.0%	27.1%	11.9%	4.8%	100%
	Pearson Chi-Square		**Value**	**df**	**Asymp. Sign.**	**Phi**	**Cramer's V**	**Contingency Coefficient**
			32.395a	20	**0.039**	0.393	0.196	0.366
	a. 16 cells (53.3%) have expected count less than 5. The minimum expected count is .33.							

Note: a 5-point Likert-type scale: 5 = Strongly Agree, 4 =Agree, 3 = Neutral, 2 = Disagree, 1 = Strongly Disagree, 0 = Do Not Know

6.4 Factor Analysis Comparison between the Local Community and Visitors

Fifteen factors were generated for both samples, 10 factors for the local community, and five under visitors. These factors addressed the third research question of Objective 3 (see *section 1.4*). Interestingly, they revealed the baseline dimensions for understanding and measuring the influential effects of the level of satisfaction for both the local community and visitors towards the development of the tourism sector, which in order to influence the destination's economic development. As shown in Table 6.16, the 10-factors explained that 56.24% of the total variance in the local community, while 60.77% of the total variance in the visitors' sample. The KMO value for all factors is above 0.50, and the Bartlett test ($p < .000$) was significant. In the case of reliability (Cronbach's alpha), most of the factors were above the acceptable level of 0.60, indicating acceptable reliability. However, some factors in the local community were below the level of 0.50. These factors could not be excluded as they served a useful purpose for the study. They are considered critical in that they affect the satisfaction of visitors and the local community and the way in which tourism destinations engage with the industry's stakeholders and delimit the inherent opportunities and constraints within destinations development strategies. In this regard, the exclusion of these factors is inadvisable and could affect the results of the study.

Table 6.16 summarizes the significance level of the relationship between the generated satisfaction factors and demographic characteristics. For the local community, the p-values of the 10-factors showed less than the significant level of 0.05, except in factor No. 6 *the collaboration of the government and tourism businesses*. In this regard, the result cannot reject the null hypothesis that was the dependant relationship between the demographic variable, nationality, and the remaining satisfaction factors. For the visitors, the *p-values* of the 5-factors showed more than the significant level of 0.05, except in factor No. 5 *uniqueness and competitiveness of the destination resources and activities*. In this regard, the result can reject the null hypothesis that there was no dependent relationship between the demographic variable, travel companion, and the remaining satisfaction factors.

Table 6.16 Relationship between the Generated Satisfaction Factors and Demographic Characteristics

The Local Community Satisfaction Factors and Demographic Nationality	**Level of 0.05**
Factor 1: Development of Destination (Tourist) Infrastructure and Resources	Significant
Factor 2: The Focus of Tourism Sector: Strategy, and Competitiveness	Significant
Factor 3: Tourism Governance and Uniqueness, and Attractiveness of Tourist Products and Services	Significant
Factor 4: Tourism Projects and Investments and Employment Opportunities	Significant
Factor 5: Destination Development Strategy	Significant
Factor 6: Collaboration between the Government and the Private Sector	Not Significant
Factor 7: Exploitation of the Destination Resources	Significant
Factor 8: Availability and Variety of Tourist Products and Services	Significant
Factor 9: Destination Marketing Activities and Promotional Methods	Significant
Factor 10: Tourism Economic Impacts versus Environment and Society	Significant
Visitors' Satisfaction Factors and Demographic Travel Companion	**Level of 0.05**
Factor 1: Destination Marketing Activities and Promotional Methods	Not Significant
Factor 2: Development of Destination (Tourist) Infrastructure	Not Significant
Factor 3: Development of Destination Resources	Not Significant
Factor 4: Quality and Variety of Tourist Product and Services	Not Significant
Factor 5: Uniqueness and Competitiveness of the Destination Resources and Activities	Significant

Source. Author

6.5 SUMMARY

This chapter provides the analysis and results of the questionnaires was obtained from the visitors (tourists and business travelers) to Oman. Descriptive and multivariate (Exploratory

Factor Analysis) were applied to explore the inter-relationships between a five-factor structure (satisfaction factors) and the demographic variable: travel companion.

CHAPTER SEVEN: INTERVIEW DATA ANALYSIS

7.1 INTRODUCTION

In light of the study’s objectives and questions, this chapter reports on the results of the quality data, face-to-face semi-structured interviews. The structure of this chapter presents the interviewees' viewpoints concerning the development and management of the sector by addressing the main research themes; *the role of destination management organization (DMO), the destination planning and policies, the marketing and promotion methods, the provision of products and services, the development of the destination products and services, and the state of development of the sector*. As shown in Table 7.1, these themes are explored and discussed based on the opinions of the government officials and private tourism managers, informants/interviewees in the development of the sector. These sections are as follows: section (7.2) discussed the status of the sector, development and challenges with a focus on the sector contribution to the GDP. This is followed by section (7.3) on the Sultanate’s development strategies: Vision 2020, Vision 2040, and the National Tourism Strategy (NTS). Section (7.4) explores the government tourist selective strategy. The Sultanate policies and procedures in the development of the tourism sector are discussed in section (7.5). Section (7.6) reviews the collaboration between the sector stakeholders in the sector. Section (7.7) shows the opinions of both sectors informants about tourism business investments in the development of the sector. Section (7.8) discusses Public-Private Partnerships (PPPs) in the development of the sector. Section (7.9) presents the Sultanate’s competitiveness in the development of the sector. Section (7.10) shows the crucial component of tourism development, tourism marketing, and promotion. Section (7.11) discusses the Sultanate’s tourism products and services. The last section (7.12) presents the impact of tourism on the development of the sector.

Table 7.1 Research Objectives and Questions Covered in the Interviews

Research Objective	Research Questions	Section
I. To understand the contribution, impact, and evolution of the tourism sector related to the economic development of Oman.	1. To what extent does the tourism sector contribute to the GDP?	7.2
	2. To what extent does the tourism sector contribute to providing employment opportunities in the market.	7.2 7.7 7.8
	3. What are the impacts of the tourism sector on the development of the economy?	7.2 7.12
	4. What are the procedures and practices the Oman government must adapt to introduce a cohesive and economically viable tourism sector that contributes to a more developed economy?	7.5 7.8
	5. How have the destination resources been exploited in supporting Oman’s economy?	7.11
II. To highlight opportunities attracting local and international businesses in tourism projects and investments, and to examine the contradictions and challenges	1. What are the government incentives to the investors?	7.7 7.8
	2. What are the challenges that need to be considered to improve investment in the tourism sector?	7.2 7.5
	3. What kind of projects and investments have been done in the tourism sector?	7.5

Research Objective	Research Questions	Section
facing the development of the sector.	4. To what extent do government laws and regulations affect investments?	7.5
	5. How has Oman tourism responded to the competitive environment?	7.9
III. To examine how different marketing methods can be used by both private and public sectors to attract a higher number of tourists and become a preferred tourist destination while also enhancing the country's competitiveness by attracting new investors.	1. What are the marketing strategies that the tourism sector has adopted to promote Oman regionally and internationally?	7.10
	2. To what extent are the destination image and branding developed?	7.10
	3. What are the tourism products and services that are provided to visitors?	7.10
	4. To what extent are the visitor's demands and the destination supplies in agreement?	7.11
IV. To assess the practices, regulations, and prospects of tourism destination management, marketing, and development by both the public and private sectors.	1. How has the Omani government policy and strategy affected the tourism section in Oman?	7.5
	2. What are the enablers and barriers to the success of Oman Tourism 2040?	7.3
	3. What is the extent of the partnership between the public and private sectors?	7.8
	4. To what extent does the Omani government control the tourism sector?	7.2 7.4 7.5 7.8
	5. To what extent does the private sector participate in setting visions and objectives?	7.3 7.8

Source. Author

The interviews took place in Muscat, the capital city of Oman, and Salalah, the largest city in the south in the period between December 2018 and March 2019. The researcher consistently oscillated between the sampling and theoretical reflections during these four months until reaching a saturation point. Table 7.2 shows a profile of the different interviewees and their positions within their respective organizations in Oman's tourism industry. Also, the transcribed sessions between Majlis Al-Shura (Omani Parliament) members and the Tourism Minister, on February 27 and 28, 2019, were combined with conducting interviews to provide a comprehensive description of the level of the development and management of the tourism sector in Oman. All interviewees have been working in the tourism industry for at least 10 years. The researcher had anonymized the interviewees who participated in this research and throughout this thesis. Following Kvale and Brinkmann (2009), pseudonyms were used in the analysis, and non-relevant details were modified (i.e., family members' names) to ensure interviewees' anonymity (Stylidis & Cherifi, 2018, p. 59). The interviews were conducted in Arabic, the government official's and tourism business manager's mother tongue, and more than half were conducted in Muscat. Each interview was digitally recorded, transcribed verbatim in Arabic, and then translated into English by the researcher to ensure that their idiomatic meanings were the same. An average interview lasted 40 minutes, with longer interviews with government officials. All interviewees had to sign a university-approved consent form before conducting the interview (see *Appendix II-A: Government Officials and Tourism Business Managers, Interview Questions*).

Table 7.2 Overview of the Research Interviewees

Case No.	Organization	Type of Organization	Location	Job Title	Academic Qualification	Nationality	Years in the Sector	Interviewee's Background
MOTM01	Ministry of Tourism	Public	Muscat	Director of Promotion and Marketing Department	Masters in Marketing	Omani	18	None
MOTM02	Ministry of Tourism	Public	Muscat	Deputy Director of Tourism Products Development	Masters in Project Management	Omani	19	None
MOTM03	Ministry of Tourism	Public	Muscat	Marketing Consultant	MBA	Non-Omani	10	Coca Cola Company
MOTM04	Ministry of Tourism	Public	Muscat	Head of Tourism Awareness Department	Bachelor	Omani	15	None
MOTD01	Ministry of Tourism	Public	Salalah	Head of Tourism Development Department	Diploma	Omani	11	Ministry of National Economy
PSM01	Golden Tourism Oman	Private	Muscat	General Manager–Owner	Bachelor	Omani	15	Oman Royal Navy (ORN)
PSM02	Unique Diamond Tour	Private	Muscat	General Manager–Owner	Masters in Science	Omani	15	Government
PSM03	Elite Travel and Tourism	Private	Muscat	Managing Director	Diploma	Omani	27	Government
PSM04	Trekking and Adventure Tourism	Private	Muscat	General Manager-CEO	PhD	Non-Omani	34	School Instructor
PSM05	Old Muscat Tourism	Private	Muscat	Managing Director	Diploma	Omani	15	Ex-Royal Guard
PSM06	Godoba.com	Private	Muscat	General Manager-CEO	Bachelor	Omani	10	International Organization
PSD01	Dhofar Tourism Company (DTC)	Private	Salalah	General Manager	Bachelor	Non-Omani	35	Medicine (MD)

MOT: Ministry of Tourism, PS: Private Sector, M: Muscat, D: Dhofar region (Salalah)
Source. Author

7.2 STATE OF THE TOURISM SECTOR: DEVELOPMENT AND CHALLENGES

Regarding the state of the tourism sector, the Minister of Tourism assured Members of the Al-Shura Council that the sector is progressing according to the national strategy (NTS). He stated that the WTTC (2018) report showed that the expected growth of Oman's tourism sector, in the period from 2018 to 2028, is 5.9%. According to the minister's previous statement, this might be evidence that the tourism sector is on the right track in the tourism development process. However, the ministry's official, MOTM01, gave an opposite view that the sector's development progress is still slow due to the reluctance of the private sector to make significant investments. Another official, MOTM03, emphasized that infrastructure development, coordination, and alignment between government parties, financial resources, and procedures are among the reasons for the slow pace of the development of the tourism sector. From the perspective of tourism business managers such as PSM01 and PSM05, they agreed with some of the minister's statements, and those of other officials, that the sector is growing according to the government development strategy, but they emphasized the need for both the government and the private sector to cooperate and market together.

It seems that despite the tourism sector development, according to the ministry's strategy, there is a lack of collaboration between the sector and the government, which is addressed in section 7.8. Again, business managers, PSM02 and PSM04, contended that the sector is growing slowly and deviating from the government's overall development strategy. PSM04 commented, *"The reasons are the complexity of the government policies and regulations."* The business manager, PSM02, claimed that Oman is still lagging compared to neighbouring countries. He argued, *"The government does not want to develop the sector fast and abroad because of the fears about the negative tourism impacts, e.g., mass tourism."* Another business manager, PSM05, attributed the lack of effective management and marketing, the lack of tourist infrastructure in many tourist sites (e.g., rural areas), and the mindsets of some government officials, cause the slow pace of development of the sector. As a result, the government authorities do not conduct proper follow-up of tourism projects and programs in terms of percentage of implementation and achievement. PSD01, a tourism business developer, endorsed the slow pace of development of the selective tourist strategy, discussed later in section 7.4. He urged, *"It is necessary to change the selective tourist strategy and adopt an open-door strategy while maintaining the social customs and traditions."*

Due to the economic crisis caused by the slump in the price of oil in 2014, addressed later in this section 7.2.2, the availability of financial resources is currently a challenging task in terms of developing, marketing, and promoting the sector, and implementing the National Tourism

Strategy (NTS). The official, MOTD01 asserted, *"Financial resources are the main obstacle and the dominant factor in the development of the sector."* MOTM02 believed that the Sultanate's geography is another challenge in the implementation of tourism projects. He stated, *"The geography of the Sultanate hinders the provision of services to some tourist sites such as Al-Jabal Al-Akhder (the Green Mountain) with water resources."* In addition to *"The country dependence on seasonal activities and weakness in implementing and following-up plans and tourism projects are other obstacles to the development process of the sector.*" In this regard, MOTM04 commented, *"Some tourism projects have exceeded the required period for completion; they must be evaluated and find out the reasons for the delay."*

The provision of financial resources and efficient and qualified human resources are the primary support and robust factors in the development of the sector. However, the existence of a lack of open-minds in some government authorities is a challenge to the development of the sector. In this regard, Mr. Al-Busaidi, a Member of the Council, believed that the most significant challenge facing the tourism sector is weak management and not the lack of resources. He also stated that *"The government managerial mindsets, which do not keep pace with the needs of the sector, can cause a delay in the implementation of the decisions."* Another member, Mr. Al-Yahyahi, stated that the sector's problem is administrative and not financial. He urged merging some sectors to save effort, time, and money. PSM06, a private tourism manager, emphasized that there are officials in the government bodies who do not seek to develop the sector and prefer to remain in a routine and monotonous state.

Most of the private tourism informants, such as PSM06, saw that some officials in the Ministry do not have adequate skills for meeting the goals of the sector development strategy. He argued that *"Those officials are not well-trained and qualified in their positions."* He suggested giving those officials more training and internships to understand the tourism sector's needs. According to MOTD01, governmental decisions are made and shared with the concerned government ministers and authorities. He clarified that *"These government parties, sometimes, do not complete their roles, and their response to the decision, resolution, might be reserved, rejected, or accepted.*" He added later that *"Even so, to some officials, these are regular practices (routine procedures) and are not considered an obstacle."* This indicates that there is a severe drawback of managing and developing the sector caused by a lack of professionalism in the sector. Therefore, implementing the sector's development strategy and achieving the national tourism strategy (NTS) cannot be an easy mission due to the lack of financial resources in the current economic crisis and the mind-sets of government officials. The issue of collaboration among the government parties is addressed later in section (7.7).

Concerning the mechanisms for overcoming the challenges in the development of the tourism sector, the Tourism Minister assured the members that the Ministry is working on finding solutions and alternatives. MOMT03, the Ministry's official, argued that the significant support factor in overcoming the challenges is the commitment and sustained attention from the government. He said, *"If the government continues to be serious about tourism, then we can make progress very quickly. It always goes back to the status of the country's economy."* Also, MOTM01 suggested efficient exploitation of the country's natural, historical resources in addition to facilitating and accelerating tourism investment procedures. PSM01 saw the necessity of opening up and getting benefits from the experiences of other countries, mainly neighbouring countries. He urged that, *"The Omani government should look for professionals to recruit and cooperate with local companies and society to get their feedback through conducting a meeting or forum every year."* PSM02 reinforced the necessity to change the government's management and have a new mindset; the right person must be placed in the right position.

7.2.1 Tourism's Contribution to the GDP

The sector contribution to the GDP is a significant indicator of progress. However, despite the immense investment and support from the government and private sectors, the contribution has consistently been below 3% for more than a decade. The percentage appears to be below the government expectations, which thus should emphasize how underdeveloped this sector is. Nevertheless, some officials showed satisfaction with the sector growth and the contribution, such as MOTM01, who believed that the current contribution is convenient and goes with the sector income, and understood that there is an ambition to increase the contribution through the goals of Vision 2040. Another official, MOTM03, emphasized that the current contribution in an emerging country like Oman, which is highly dependent on the oil sector, is reasonable. On the other hand, the official MOTM04 found that the percentage is not persuasive as a contribution to the country's economy.

Most of the business managers like PSD01 and PSM06 agreed that the contribution is feeble due to the lack of tourism infrastructure and attractions, as well as the focus on attracting the wealthy and responsible tourists (the tourist selective strategy), while there is, for example, apparent neglect for younger tourists needs. PSD01 commented, *"The change in the sector must be commensurate with the needs of the current and future generations."* Besides, they attributed the weakness of the sector's contribution to spending millions of Omani riyals in the wrong investments and projects, as well as on programs and activities that have a weak financial return such as luxury hotels in some remote parts of the country, and the waterpark in Salalah.

Clarifying the percentage of the sector's contribution to the GDP, the official MOTD01 explained that the contribution does not include all tourism products and services and only includes revenues from specific and limited sectors and activities, such as hotels and resorts, restaurants and cafes, airline tickets, historical places, and some businesses. He added there are many activities still under other government bodies, which should be counted under the tourism sector—giving an example of some international restaurants, such as KFC and Hardees, which are under the responsibility of the municipalities. In addition to some seasonal practices which are not counted in the contribution, such as citizens' apartments. In this regard, some members of the Council demanded the entire jurisdiction to manage the whole tourism sector without any interference from other authorities. This indicates there are still many tourism activities that are not under the MOT, which may cause overlapping and contradiction in tasks and responsibilities among the government departments.

Furthermore, the Ministry’s Statement (2019) to the Al-Shura Council showed that some hotel establishments did not collaborate with the MOT in the disclosure of their real revenues, which may lead to a loss in tourism fees and affect the sector contribution. Mr. Al-Hadabi, Member of the Al-Shura Council, urged the tourism minister to disclose the names of those companies that did not contribute to the sector revenues. The Minister replied, *“The Ministry had raised cases in the courts against those companies.”* The official MOTM03 attributed the low contribution to the national GDP to the high contribution of the oil sector, which is always over 70%. He expressed that in any country that has an oil sector as the primary source for its economy, other sectors’ contributions are small, such as the case of Oman. He explained, *"Oil is always the most significant sector in oil-exporting countries that is why the tourism contribution at 3% is an acceptable contribution and will go up to 7% and then to 10% in 2040.”* Besides, he emphasized, *“There is no miracle to reduce oil-exporting below 70% because of the intensity of dependence on oil and the weakness of other sectors as alternatives for oil.”*

7.2.2 Oman Economic Crisis: the Slump in Oil Prices

The slump in the price of oil has clearly reduced the economic development in the Sultanate. Due to a high government budget deficit that resulted from the crisis, many of the public projects and investments, which are fully or partially funded by the government, are currently frozen and seized, according to PSD01 and PSM02. A prime example is the international tourism company, Muriay, which currently has many integrated tourism complex (ICT) projects in limbo: *Salalah Beach* in Dhofar Province and *Al-Sifah Beach* in Muscat for example. Because of the lack of both national and international buyers, the company could not sell villas and apartments, which led to freezing some of their projects and laying off hundreds of workers. In this regard, the MOT had made amendments to some of the ongoing tourism projects, according to the tourism minister. However, some informants like MOTD01, and Offical, maintained that the effect of the crisis is just temporary and will be resolved as soon as the price of oil increases. According to the officials MOTM01 and other business directors, the crisis has no effect on tourism projects and investments in the private sector because the investors had access to their own funding before the establishment of the projects. This shows that there is a contradiction in opinions amongst the government officials regarding the impact of the crisis on the strategy (NTS) and the private tourism projects.

In the context of Oman Vision 2040, the country's economic crisis has affected the implementation of the National Tourism Strategy (NTS) and as well, the future five-year plans emanating from both the current Vision 2020 and Vision 2040. According to the Ministry’s statement (2019), although the Minister’s Council endorsed the strategy (NTS) in 2015, until now, the first stage of implementation of the strategy process is frozen due to the lack of funds in the government financial budget. In this regard, a council member, Mr. Al-Badi, urged permission for the private sector to implement the first phase of the strategy and highlighted the benefits from neighbouring countries’ experiences in enhancing the sector. However, MOTM03 argued that in order to learn and create the same opportunities as next-door (Qatar and the UAE), the sector has to have the same mind-sets as its neighbours and, *“Unfortunately, we do not have the same mind-set.”* This indicates that the private sector does not have enough power in the sector. Also, there is a need to learn from neighbouring countries, the current leaders in tourism development in the Arabian Gulf.

7.3 OMAN TOURISM PLANNING AND STRATEGIES: VISION 2020 AND VISION 2040

In the context of Oman Vision 2020, most of the interviewees agreed that Vision 2020 is not clear to the majority of Omanis, including government officials and the private sector. PSM02, a business manager, claimed there is no clear link between the Vision 2020 objectives and the realities of what it has been achieved so far. He argued, *“There was no actual strategic management that implements the Vision."* However, in his speech at a student dialogue session at the Sultan Qaboos University (SQU) on development planning and the path of the Omani economy, Deputy Secretary-General of the Supreme Council of Planning, Talal Al Rahbi said that 70% of the 2020 Vision goals had been achieved despite some challenges (TimesofOman, 2019a). Oddly, there was no clear evidence given on this percentage or any other detailed information. The Vision's objectives were not achieved, and the evidence is that oil dependence is still over 70%, although it was now supposed to be below 40%. Also, the percentage of Omanis in the private sector represents only about 15% of the total workforce, attributing this fact to the weak role of the private sector in the economy (TimesofOman, 2019a). This contradiction has raised the need to understand why there are differences and conflicts between the national objectives and projected outcomes.

Many informants found that Vision 2040 was promoted better than Vision 2020, primarily through seminars, conferences, workshops, and meetings between government officials and the local community. However, they warned that the possibility of repeating the same mistakes of Vision 2020 in Vision 2040 could be due to the lack of effective strategic management. An official expert in the Ministry, MOTM03, commented on the difference between Vision 2020 and Vision 2040, *"I do not know. I was not here when they set up the vision 2020, however, what I know from now and onward, is that more looking to focus on other sectors. We are just focusing on 2040."* The question raised here is how it is that an expert, who has been working in the government for many years, does not know about Vision 2020. He either honestly does not know about the Vision, which is a disaster, or he could be hiding the facts.

On the subject of the participation in setting the national tourism strategy (NTS2040), informants' replies showed there are conflicts and misunderstandings about the roles and responsibilities between the government and the private sector in terms of implementing the strategy. Some government officials, as well as tourism businesses, especially local companies, have no idea about their roles in the implementation of the strategy (NTS). They believed that the government is mainly responsible for achieving the strategy. Most of the private informants agreed that many small tourism companies did not receive an invitation to participate in setting up the strategy. In this regard, PSM05 commented, *"I did not participate in setting the national tourism strategy as well as other small tourism companies. Others, big tourism companies, might get involved; those are the favourite ones at the Ministry of Tourism."* This indicates that there is no actual participation from the private sector in setting the strategy, and not all types of tourism businesses were involved or participated in the ministry activities.

In the session between the Tourism Minister and the Members of the Al-Shura Council, questions were raised enquiring about the process of implementing the strategy (NTS). Mr. Al-Sarmi made it clear that *"We do not want to hear more about the strategies; we want to see real goals on the ground."* This might demonstrate that the government is still struggling in achieving the Vision 2020 goals and implementing the new Vision 2040. With reference to statements made by the Minister of Tourism, the Strategy (NTS) was planned to be implemented in 2019 instead of 2016. Dr. Masan was called to review the strategy and commented that *"The delay in implementing the sector strategies have affected the citizens' confidence."* This might raise questions from the local community as to whether there is actually a true vision? Mr. Al-Kindi raised the question, *"Is there anyone who seeks to thwart the ministry's plans?"* Replying to the question, the Minister pointed out that, *"those who have participated in setting up the strategy (NTS) are responsible for the implementation and figures in the strategy."* In this regard, the question should be raised here, *who are they, and are they related to the tourism sector?* Mr. Al-Hadri raised a question, *"To what extent can the goals set out in the tourism strategy be achieved?"* The Minister answered, *"Some tourism initiatives (Tanfeedh Initiatives) are ongoing and do not have a specific time to accomplish as they are associated with other government departments in terms of studies, policies, regulations, laws, and mechanisms."* This indicates that the strategy has no time limit, which might affect the achievement of the strategic goals.

Concerning the implementation of the strategy (NTS), all interviewees believed that the implementation of the Strategy (NTS) might be a step in the right direction for the successful positioning of Oman as a favourite tourism destination. However, they were worried that the strategic goals might never be achieved, as in the case with Vision 2020. Regarding the potential tourists and the strategy's budget, Mr. Al-Lawati questioned, *"If we want to attract 5 million tourists, then surely this is a low target with an investment plan exceeding OMR 19 billion (US$ 49.1bn)?"* He also questioned why the amounts requested by the MOT for implementing the vision estimated OMR 5-8m (US$ 13-20m), were not approved. Also, an informant, PSM06, raised some doubts about the expected number of tourists in 2040, around 12 million. He argued that, *"Neighbouring countries have currently exceeded this figure and over, not after a quarter of a century like in Oman."* Also, he commented on the allocated amount of OMR 19bn *(US$ 49.1bn)* for the development of the tourism sector that *"It is an exaggeration, as well as the expected number of jobs (500,000)."* In this regard, the Tourism Minister explained to the Council that *"When the government sets the figures in the tourism strategy, it takes into account the sector growth rate, but this does not prevent reviewing the figures in the strategy."* This indicates that those figures do not include changes in the sector in the near future.

7.4 OMAN TOURIST SELECTIVE STRATEGY

The Omani government has set a *tourist selective strategy* to select tourists who would support the economy and do not negatively affect the society and the environment. Regarding the competence of adapting the strategy at this stage of development, interviewees like MOTM03 and PSM05, saw the strategy as being directed to the objective of the government's appropriate intention, that is to reduce the negative impacts of tourism (see *section 7.12*) and to give focus on a specified category of tourists-wealthy and responsible. Also, most of the government officials and those who showed strong support to the strategy argued that adopting the open-door strategy might lead to the blurring of the country's identity and culture by allowing strange practices and habits into its community. For example, Dubai, since the 1990s, has adapted an open-door policy for tourism. The destination may gain economically, but its socio-culture has eroded, according to some officials. In this regard, the official MOTM03 commented, *"The best position of Oman is with people who have a mindset of Oman. We have to be careful with the environment (natural and socio-cultural); that is why we want to make sure people who come here should understand this."* This indicates how the strategy might be successful in preserving and protecting the county's cultural and natural resources. The issue is more closely related to the negative impacts of tourism on both society as well as the environment rather than on the economy. This leads to the necessity of finding a balance between these pillars. Again, some officials were worried about opening the gates for everyone, including lower budget travellers such as backpackers who do not spend much money and may cause harm to the natural resources. Still, some private managers, like PSM03 and PSM05, believed there were no immediate adverse effects for allowing different segments of tourists into the country. As many private businesses have started to move towards low budget hotels, the informants were confident of the benefits the economy might gain in the long-term, specifically for small tourism companies. *"Tourists with a low budget segment of visitors will spend their saved money in order to enjoy and appreciate nature and the local culture and heritage,"* PSM05 said.

In contrast, other interviewees, like MOTM04 and PSD01, who advocated the open-door strategy, emphasized that the tourist selective strategy may not function as it is intended. They asserted that the country, at this stage in the development process, needs all types of tourism segments. PSD01 argued, *"There is a contradiction in the strategy that most of those visitors are not wealthy or responsible tourists, which is contrary to the ministry's strategy to attract wealthy tourists."* MOTM04 added, *"The government is wasting resources by only trying to reach small segments of visitors wherewith the same resources, a broader scope of segments could be reached."* PSM06 believed that the strategy is just a justification for government failure in promoting and marketing the Sultanate. Gave an example of tourists who are attracted through week-long packages (all-inclusive) hotels, and the travel agents who provide those at low prices. He commented, *"The all-inclusive package is excellent value for money for tourists* *who do not want to spend a lot in the host destination. In Oman, they are not spending much in the local market, because all their needs are provided within the inclusive package, food, accommodation, transportation, and excursions sometimes."* Also, he added, *"Many hotels and resorts in Oman have adopted an all-inclusive holiday package to keep low costs and therefore attracting more guests."*

7.5 OMAN TOURISM POLICIES AND PROCEDURES

The success of the tourism sector or its failure results from the country's system of legislation and regulations. Dr. Massan reminded the Minister about updating the tourism law, which has not been done so far. The Minister justified the delay, *"The tourism law is ready, but we are in the process of restructuring the sector to add a bureau, Oman Conference and Marketing Bureau (Tanfeedh initiative) to involve tourism promotion, marketing, and conferences."* Dr. Al-Harsosi called for decentralization in the sector management through the empowerment of tourism departments in various governorates in the Sultanate. The Minister provided assurance that "*all the Ministry's departments and directorates in the governorates are empowered and connected electronically."*

The lack of transparent laws, regulations, and policies might have reflected negatively on private sector projects and investments; also, overlap among the government departments is evident in some aspects of tourism projects. In this regard, MOTM03, an official, commented, *"Sometimes, there is an overlap among the government bodies, and sometimes there is a gap. It is not an ideal situation, but we are working on that in the Ministry of Tourism."* Mr. Al-Sarmi pointed to the list of required approvals that the investor has to obtain from the concerned government departments, which might cause some investors to leave and invest in other countries. The Minister argued, *"The Ministry of Tourism follows up the investor's project application after obtaining the usufruct approval from the concerned authorities."* This indicates that the process of implementing such a policy or law is not in the hands of the ministry. It is a collaboration among the government authorities, which is an integration process that when a delay comes from one ministry it could cause a delay to others.

Moreover, according to the informants' answers, the complications of rules and regulations have led to a call for a particular action (exception) to override the system from the high hierarchy, the minister, in the government. According to some officials and tourism managers, exception or exemption from the Ministers is a big hindrance to applying the rules and regulations in Oman. PSM02 made clear, *"Because of the complications and long term procedures, some companies strive to get an exception or exemption from the Ministers to accelerate the process. As a result, the exception has become the base for most of the* *procedures, ignoring the rules and regulations."* Although exception or exemption is a way of speeding up the process, it may cause harm to the systems and override the rules and procedures. Also, it demonstrates the complexity of the procedures and processes. This manifests a need for transparency and clarity in the laws and regulations.

7.6 TOURISM STAKEHOLDERS' COLLABORATION IN THE DEVELOPMENT OF THE TOURISM SECTOR

The collaboration between the sector's stakeholders is the crucial issue that the MOT and other governmental authorities take into consideration to ensure the success of the sector development process. MOTM02 stated, *"The Ministry is more the organizer and legislator than the executor of tourism projects through the development of laws, policies, and regulations for the sector*." In addition, MOTM03 added the need to follow up on the progress of tourism projects and coordinate with other government agencies to stimulate tourism. However, the MOT is not the only government agency that sets up tourism sector policies and procedures. Other government entities such as the Ministry of Heritage and Culture and the Ministry of Municipalities are also involved due to the regulations and policies, which are interrelated and require consistent collaboration. However, government intervention in the development of the sector may lead to some significant negative impacts on the development process. According to MOTD01, the relationship between the MOT and other related ministries might look cordial but are actually strained because these ministerial departments have different objectives in the sector. This, according to MOTM02, is true, giving an example of the relationship between the MOT and the Ministry of Environment and Climate Affairs (MECA), whose primary responsibility is the management and conservation of the environment and natural resources. MECA is opposed to the construction of accommodation infrastructure in almost all protected natural areas. As a result, this can limit the degree of tourism development in many tourist sites due to the absence of tourist infrastructure and could then make these sites less attractive. MOTM04 commented, *"Although the Ministry's programs are clear, there are some issues with other ministries and authorities, which causes delays in implementing the procedures and further delays in acquiring the permits and licenses."* On the contrary, MOTM01 and MOTM03 assured that communication and collaboration with MECA are reasonable and accessible, leading to the construction of hotels and resorts in some remote areas.

Regarding the collaboration between the government and tourism businesses, many officials have shown an objection to the limited collaboration amongst stakeholders involved in the decision-making process. Some informants, like MOTM01, believed that attracting tourists to the Sultanate is the role of both the private sector and the government, through the participation in international conferences and exhibitions. Having a different view of point about the private sector involvement, PSD01 said, *"I do not know how far the private sector is involved in the tourism sector because there is no control over the performance of the private sector in the tourism sector."* He added, *"There is no study showing the extent of the participation of the private sector in the tourism sector."* This indicates a gap in what has been claimed by the government regarding the involvement of the private sector. This should give evidence of weak participation and collaboration between the government and private sectors. Also, this may raise a doubt about how the MOT collaborates with the private sector and the kind of support (incentives and facilities) the MOT can provide to encourage tourism businesses (local and international) investment.

To reduce the gap, and to avoid conflict between tourism stakeholders, the MOT has organized many seminars and workshops with private sector stakeholders explaining their current and future actions. Giving an example, PSM01 said, *"We had a presentation in the Ministry regarding how we can benefit from participation in the EXPO2020 in Dubai*." This gives an excellent positive reflection on the future relationship between the private and public sectors through linking tourism planners and the government, with tourism businesses, to collaborate. Another example stated by PSD01, *"Tourism companies' managers have recently been involved in the Ministry's meetings and training programs to discuss issues related to the tourism sector. These meetings and seminars, however, did not exist in the past and only began at the end of 2018."* On the contrary, other business managers, like PSM04, argued, *"The Ministry's meetings are not good enough and are very limited, a few per year. Also, the topics discussed in the meetings do not cover all aspects of the sector."*

The local community reaps the ultimate benefit of having a synthesis between resource utilization and economic gains. Therefore, the lack of involvement of the local community in the development strategy can cause problems for tourism activities, which negatively affect the development of the sector. MOTM03 assured, *"The Ministry of Tourism has involved the local community as the primary partner in setting the strategy (NTS)."* MOTM03 added, *"The local community's voice is heard in all tourism projects."* The questions asked here are, *"To what extent does the local community participate in setting the strategy?"* and *"Has the local community participated in the sector before?"* The answer can be acquired from the private sector and the local community, however, the MOT sometimes faces opposition from the local community regarding tourism projects, for instance, developing rural areas and natural resources. These objections can hinder the completion of the project and sometimes can cause the withdrawal of the investor. MOTD01 gave an example of the development of a hot spring

(Al-Kasfa) in the Rustaq area in Al Batinah South province. The project is still pending because of the refusal of cooperation from the local community. MOTM04 pointed out, *"The locals in some regions reject the idea of developing their areas as tourist sites because the development may reflect negatively on their community."* As a result, this reflects adversely on the growth and development of the tourism sector. Thus, community awareness and acceptance of tourism projects are still a challenge to the development process of the sector.

7.7 TOURISM BUSINESS INVESTMENTS IN THE DEVELOPMENT OF THE TOURISM SECTOR

Tourism sector investments, according to MOTM01, require approvals and permits from tourism-related government agencies, which may take a long time in some cases. *"As a result, this might disrupt some tourism projects and reluctance from the investor to proceed,"* MOTM01 said. PSM02 argued, *"The private sector has not contributed to the level that it is supposed to due to the government's complicated policies and procedures."* Also, MOTM02 emphasized, *"A project permit takes a long time, from months up to years, through a series of procedures, laws, and routine operations, which reflects poorly on the investment side; while in other countries it is done in a short period."* In the interview session, Dr. Al-Amri indicated that many investors have complained about the slow pace of procedures, which may take months and could force investing in another country. He commented, *"This is inefficiency, and it helps in discouraging potential local and foreign investors that the sector seriously needs."* Hence, there is a need to adjust and simplify the complexities of laws, regulations, and policies for investment in the tourism sector. In reply to their demand, the Tourism Minister called on the members to hold him accountable in case of any *irregularities*. He made clear, *"I am ready to take full responsibility if it is proved that the Ministry of Tourism impedes investment procedures."* At the same time, the minister indicated that the delay in procedures comes from other authorities, not from the MOT.

Furthermore, the Minister revealed that those who come to Oman are brokers, not investors. He commented, *"The complexities come from the investor due to the failure in the economic feasibility and the size of the project. Many people pretend they are investors, but they are brokers."* This indicates that there is no mechanism in the government to identify a real investor who has the intention to make a real investment or just brokers who look for a commission and takes advantage of the incentives given by the government. There is a need to set strict mechanisms and processes to define them.

Regarding the type of support (incentives and facilities) to encourage tourism investments in the sector, MOTM01 commented, *"The government has supported the private sector with the* *granting of land for investment and the financial support from local banks and tax exemption in the early stages, and the investment contract period, which extends from 20 to 25 and reaches 50 years."* The Tourism Minister clarified in the interview session that all lands offered by the MOT for investments are under the right of usufruct. Finding out if the local and international investors have given the same incentives, MOTM03 commented, *"They get the same support and incentives, but the priority is given to the local investor. In case the local is not available, then it is given to an international investor."* This indicates that the priority in investments is given first to the Omani companies and investors.

The National Tourism Strategy (NTS) shows that the private sector constitutes 88% of the sector development process, whereas the public sector is 12%. To clarify the contribution, the Minister argued, *"All investments are under the private sector except some tourism projects which are still under the Ministry and other government projects."* He clarified, *"The government's 12% contribution is only in the infrastructure, such as essential utilities and public services."* This indicates that the role of the government in developing the sector according to the strategy is more limited to the provision of the infrastructure. In contrast, the superstructure is in the hands of the private sector. However, MOTD01 stated, *"The financial expenditure on investments and projects, from both the government and private sectors, did not reach the desired level."* PSM02 also claimed, *"There is no real investment in the tourism sector."* He argued that there is a gap between the government and tourism businesses in terms of issuing policies and procedures as well as regulating the sector.

7.8 PUBLIC-PRIVATE PARTNERSHIPS (PPPS) IN TOURISM DEVELOPMENT

The development of the tourism sector could be best achieved through a result-driven partnership between the government and the private sector. In supporting the collaboration and partnership between both sectors, MOTM02 said, *"There are 2 types of cooperation between the ministry and the private sector and those are organizational and supportive cooperation."* He clarified organizational cooperation as to organize and manage the sector through laws, regulations, and policies. Whereas supportive cooperation means that the government supports the national companies, SMEs, both technically and financially, for instance, the *Misfat Al-Abreyeen* project. This kind of collaboration should give a new example of the partnership and how the government supports both the private sector and the local community.

Although the partnership between the private and public sectors is at a reasonable level, the replies from the official informants like MOTM01 and MOTM02 showed that the private sector, in some cases, is not given a full role in terms of projects carried out and the provision of information in terms of improving tourism products and services, and setting policies and procedures. As a result, the rules and policies are just imposed on the private sector. This indicates a gap in the level of collaboration and partnership between the sectors. Some of the private informants expressed that the partnership between the government and the tourism businesses is complicated and limited due to government management that needs to be more open-minded. As PSM04 commented, *"Sometimes, the Ministry has no idea about our business."* PSM03 blamed the government, *"The government is in charge of all this."* Others, such as PSM02, attributed the gap in the partnership to the government-issued bylaws and regulations, which sometimes go against the private sector's wishes. According to PSD01, the government imposes what is permissible and what is not. PSM03 stated, *"It is necessary to avoid the idea of imposing decisions and policies with no reference to the private sector."* He insisted that objections or rejections from tourism companies to the government decisions are not taken seriously, which creates a conflict between the government's decisions and procedures. This indicates that not all ideas or suggestions that come from the private sector are taken seriously by the government. *"The government is only focusing on the points that make it to the leading role,"* PSM0 said.

Moreover, some of the business informants shared the view that the partnership between the sectors is limited to only a specific category of tourism companies, especially the large ones, leaving out the smaller local companies. There are, however, smaller local companies and the tourism companies, favoured by the government, that have a strong relationship with government departments and the privilege of being in the decision-making process. This is due to their financial status as well as the support from officials in the government bodies. Giving an example of such practice, PSM02 stated, *"The Ministry of Tourism does not discuss with tourism businesses its participation in the international tourism exhibitions and events, in terms of promotion and marketing schemes and programs, and which companies should participate in."*

7.9 OMAN DESTINATION COMPETITIVENESS

According to most informants, both officials and business managers attributed the position of the Sultanate lagging behind neighbouring countries in the development of the sector to the lack of tourism activities, as well as the lack of marketing and promotional schemes and programs. This indicates that the Ministry has not implemented a proper marketing strategy to promote the Sultanate. Nevertheless, all of the interviewees, both officials and business managers, showed a strong belief that the Sultanate has a great potential to compete with neighbouring countries in the GCC region. They emphasized that the tourism competitiveness of the Sultanate could be realized and promoted by using efficient management activities and through efficient product development and high-quality tourism infrastructure. It was also suggested that there needed to be other required improvements, such as the ease of investment procedures and the modification of government laws and regulations to expand the accommodation sector and other potential tourism projects. The private informant, PSM02, urged the need to develop more entertainment activities and viewed these essential factors in enhancing the Sultanate's competition in the tourism market. MOTM03 added further, *"We do not have many entertainment activities in the country because people do not come here for the entertainment. They come here for discovery and the tourism experience rather than for shopping or entertainment."* This shows a contradiction between the officials which is more important to develop: more human-made attractions or more natural sites.

7.10 TOURISM MARKETING AND PROMOTION IN THE DEVELOPMENT OF THE TOURISM SECTOR

Regarding the Sultanate's status in the global tourism market, MOTM04 argued, *"The Sultanate needs to make more effort to maintain its position worldwide."* MOTM02 shared that *"The MOT focuses on the local and international rankings, awards, and the international indicators that present Oman as a tourist destination."* However, Dr. Al Yahyahi, Member of the Al-Shura Council, pointed out that the Sultanate's position in some global indicators is still behind neighbouring countries and has not shown much progress. He wondered how the MOT could go beyond these indicators to improve the Sultanate's global position in the tourism market. Mr. Al-Lawati also inquired of the Minister of Tourism that the Sultanate ranked 92 in the world, but *how will we make Oman a central station (hub) for tourism, at this pace and with the same management?* The Minister replied that the tourism sector's total growth is not less than 5.7% (direct and indirect), thus giving a positive indicator. He added that, *"The global index for tourism growth is 4%, and in the region, approximately 4.3%, which means that we are more than that."* From the private perspective, informant PSM01 commented on the Sultanate's position in the global tourism market stating that, *"Oman might position itself on the global tourism map, but this is not enough, more efforts are required to achieve sector targets to raise the sector contribution to the GDP by 6% in 2040."* PSM06 insisted that the Sultanate is still unknown to many people around the world due to the lack of marketing activities and promotion programs. This indicates that there is still a need to review the Ministry's marketing strategy to promote the Sultanate effectively in the global tourism market. Opening-up more to international tourism markets, the upcoming international events, namely participation in the Expo-Dubai 2020, and the World-Cup 2022 in Qatar, Dr. Al-Yahyahi again questioned why there was not more readiness for the two global events (*Dubai Expo 2020*) and (*World Cup 2022 in Qatar*). He argued that the government must work hard to benefit from these two important events, though there are doubts about losing these two opportunities. The Minister of Tourism, replied, *"There is a supreme committee, and the Ministry is a member to study the expected flow of visitors from the Expo Dubai 2020 to Oman and the preparations for the 2022 World Cup."*

7.10.1 Marketing and Promotional Schemes and Programs

Regarding marketing and promoting the Sultanate, MOTM03 clarified that *"The Ministry's marketing strategy is mainly focused on developing a positive destination brand image, selecting appropriate target markets (e.g., Europe and Asia), and maintaining standards for tourism facilities and services."* However, it might be necessary to evaluate the ministry marketing strategy in terms of offered tourism products and services. Also, MOTM03 assured that, *"The Sultanate promotes itself locally and internationally, and the marketing and promotion schemes go along with marketing and promotion of other countries."* However, MOTD01 and MOTM04 both felt that those schemes and plans were not sufficient, and tourism managers' expressed concern over the lack of marketing to the right segment in the global tourism market. Tourism managers urged the need to review the current marketing and promotion methods in order to promote the sector in international markets. For example, PSM01 argued that *"We are marketing the Sultanate, but we are doing it to the wrong people. Therefore, we have to make sure the marketing is being directed at the right people, and this is not an easy task."* Mr. Al-Hadri gave the Salalah Tourism Festival an example of the lack of efficiency in promoting the Sultanate locally and internationally. The Minister replied that the Salalah Festival is under the administration of the *Dhofar Municipality*, not the MOT. However, the minister added, *"We do not want Salalah to be an attractive destination to people with limited spending."* This indicates that the sector in Oman might not be able to cope with the changes in the world tourism markets because of ineffective marketing, promotional programs, and schemes.

For attracting more visitors to Oman, there is a need for reliable tourist infrastructure, particularly budget accommodation, entertainment activities, and public services. PSM03 mentioned the lack of accommodation within the sector, in particular, budget hotels. PSM04 commented that *"Hotels are expensive, due to the lack of budget hotels, and poor entertainment activities."* She added that "*The lack of this type of accommodation has caused high prices in the hotel sector."* Tourism managers like PSM02, PSM04, and PSD01 argued that hotel prices are the most expensive in the GCC countries due to seasonal tourism and the lack of tourist activities to attract visitors throughout the year. Mr. Al-Abri noted the contrast in hotel rates given to the international visitors and Omanis. The Minister replied that *"Hotel* *prices are linked to packages, and the Ministry is seeking to find a special rate for Omanis. Note that some companies like Booking.com give a discount rate for frequent bookings."*

In the context of promoting MICE tourism in Oman, Dr. Al Yahyahi asked the Minister for the reasons that Oman does not host enough international conferences and events. The Minister explained that, *"MICE tourism is linked to the tourism stock exchange where countries compete to host conferences through the programs and services they provide."* He elaborated that, *"The Ministry's proposal file has to include airlines, ticket prices, hotels, and other related services. Some conferences require more services and free incentives, where the ministry, sometimes, has no abilities and capabilities to provide."* Moreover, the Minister was urged to distinguish between the conferences the Sultanate is responsible for, and the ones that should not be considered, like hosting *the Gulf Cooperation Council*. This indicates that the Sultanate is unable to host many international conferences or other significant events such as the WTM, ITB Berlin, and Dubai Arabian Travel Market due to low capabilities, low budgets, and lack of readiness of the infrastructure.

Many countries, particularly developing ones, have been using sports as an advantage point to promote themselves, such as the Chelsea Football Club supported by the UAE and the Barcelona Football Club supported by Qatar. Sadly, there is no international football club carrying the name of Oman. Commenting on the lack of sponsoring an international football club, MOTM03 said that, *"We will not spend our money to sponsor a football club because it can cause mass tourism which we do not want to bring to Oman."* He also added that, "*We direct our promotion of Oman to those segments of tourists whom we want to bring in Oman. That is why we do not see Oman's name on sports t-shirts."* Justifying the reason, this government official and some informants, officials and managers, all agreed that the Sultanate is well-promoted regionally and internationally as a stable and safe destination and a country that is proud of its culture and heritage. This shows a weakness in taking advantage of sports activities such as football clubs in promoting the Sultanate abroad. This is different from neighbouring countries that aim to attract tourists through famous sporting events and activities, such as the *World Cup 2022* in Qatar, horse racing in Dubai, and *Formula 1* in Bahrain.

7.10.2 Oman Ranking in Number of Visitors

According to the NCSI and GCC-STAT reports, the Sultanate has shown a weakness in visitors' numbers compared to neighbouring countries. The tourism ministry stated that political instability in the Middle East is the main reason for the drop in tourists visiting the country. "*Sliding oil prices have also curbed general investment in the tourism sector,*" he said

(GulfNews, 2016b). MOTM03 justified the reason stating that, *"The Sultanate is a new tourism destination, compared to neighbouring countries that have been in the market for decades before the Sultanate. Consequently, the Sultanate needs more time and effort to cope with those countries and to be well-recognized globally."* Another official, MOTM02, reasoned that entertainment activities in neighbouring countries are varied and located in a way that encourages visitors, both domestic and international, thus more popular, while in Oman, such entertainment activities are few and far between and limited to highly populated areas such as Muscat. MOTM04 insisted that *"The growth of the tourism sector should not only be measured by the number of visitors, but also by the offered activities and programs."* She gave an example of the UAE that has increased the number of visitors by cancelling tourist-entering visas, while Oman still imposes a visa as part of the tourist entry process. She also commented that in order *"To fulfill visitors' needs, the government, in cooperation with the private sector, needs to increase the number of recreational and entertainment activities as well as diversifying tourism projects across all regions of the Sultanate."*

In contrast, other government officials such as MOTM03 assured that Oman has an excellent ranking among the GCC countries for the number of tourists. He commented that, *"I do not care about ranking. I do care more if the tourism sector is growing healthily."* MOTM02 also held an optimistic view that the annual increase in visitors' numbers to the Sultanate, even if small, is an achievement.

7.10.3 The Ministry's Budget

Regarding the Ministry's budget for marketing and promoting the sector, MOTM01 commented that, *"Before the economic crisis, there was a massive expenditure, millions of Omani rial, on international and local events and promotional programs. Unfortunately, the outcomes were modest and below the expectations in terms of marketing and achieving the desired objectives."* MOTM02 commented on the budget in comparison to neighbouring countries stating that, *"Governments in neighbouring countries have budgets for promoting and marketing their tourism sectors dozens of times the budget of the Omani Ministry."* Due to the deficit in the state budget, the Ministry's budget for marketing and promotion was reduced. MOTM04 commented that, *"Before the Oil price crisis in 2016, the marketing budget was OMR 11 million, and now is currently only OMR 3 million. This is a huge drop in the budget, and the current budget is not sufficient to cover all programs and activities."* The MOT reviewed its programs and events to be consistent with the current budget. In this regard, MOTM02 commented that, *"As a result of reducing the budget, many marketing and promotion schemes and programs have been adjusted to cope with the country's financial* *performance."* PSM01 and PSM02 indicated that the MOT spends much money, millions of Omani rials, on promotion and marketing without achieving the desired objectives. They are convinced that the problem lays behind the Ministry's marketing strategy because, since 2000, the results have been weak and have not met expectations.

7.10.4 International Representation Offices (IRO)

The MOT promotes the country abroad through international representation offices (IRO). However, MOTM02 assured that the MOT needs to evaluate those offices annually and review their performances and achievements. He added that, *"Some of these offices are closed now due to their lack of effectiveness and weaknesses in promoting the Sultanate in their region."* PSM03 and PSM06 expressed a belief that little is presently being done towards promoting the Sultanate abroad.

Almost all of the tourism managers informants emphasized that the IRO offices are only in connection with the MOT, not with their companies. They insisted that most of the tourism companies may have no idea about these IRO offices and their roles in promoting the Sultanate. They stated that there is no effective coordination between the Ministry and their companies in terms of periodic meetings with those offices. They revealed that most of these meetings were held between the Ministry, the IRO offices and a few large tourism companies, the favoured companies of the Ministry. This indicates a gap between the international offices and tourism companies leaving only a weak collaboration unless the Ministry arranges it.

7.10.5 Social Media in Marketing and Promoting the Sultanate

The officials and private managers mentioned the importance of utilizing new technology, mainly social media programs, to reach a larger number of international tourists. They believed this method is both cheap and fast, in addition to covering a full scope of international geographical locations. The Tourism Minister assured that the Sultanate is well-promoted electronically, and in 2018, OMR 3.5 million (US$ 9m) was spent on exhibitions (e.g., ITB-Berlin, London-WTM) and campaigns (e.g., Discover Oman) to promote the Sultanate locally and internationally. Later, he added that some expensive promotions are incompatible with the current financial situation and less expensive promotional campaigns are required. This shows how the Sultanate would easily reach different segments of visitors to the Sultanate.

7.11 OMAN TOURISM PRODUCTS AND SERVICES IN THE DEVELOPMENT OF THE TOURISM SECTOR

Tourist products and services are not static and develop according to the preferences and needs of tourists. In Oman, with the purpose to cater to the interests of targeted tourism segments, the government has been working on placing a high priority on the development and provision of high standard tourism products and services, according to the Ministry's official, MOTM03. However, other informants like MOTM02 and PSM06 emphasized that the significant challenges to the development of the sector is the only limitation of high-quality accommodation but also complementary services and facilities which are scarce, such as cafes, public toilets, and restaurants in many tourist sites. MOTM02 gave an example of shopping centres and facilities that are inadequate in Oman compared with those in other destinations, mainly the UAE, which has developed a reputation as a regional shopping destination. He revealed that the infrastructure in Oman is not completed outside the provincial centres, only in the big cities such as Muscat, Salalah, and Sohar. Thus, the lack of services directly affects the tourism sector and, in turn, its contribution to the GDP. In Salalah, for example, although the city is fully-occupied with tourists from June to August, it has shown a lack of grand shopping malls and other tourism activities. Commenting, PSD01 argued, *"In Salalah, there is only one big shopping centre with simple tourist activities."* Again, he added, *"I cannot imagine a tourism destination like Oman does not have a zoo or water parks, despite the beaches, mountains, and other wonderful natural areas."* According to the official informants and the Minister of Tourism, not all tourism products and services are under the umbrella of the MOT. For example, both the Muscat and Salalah Festivals, in addition to some seasonal practices such as apartments, hotel houses, gardens, are under the municipalities when they are supposed to be counted under the tourism sector. Therefore, there is a need to segregate those activities and add them to the sector.

The strategy (NTS) was built around developing the country's resources and attractions that preserve the Sultanate's authenticity. Thus, in order to achieve the strategy (NTS), MOTD01 emphasized that the Sultanate needs a robust infrastructure providing a vast number of tourism activities in the coastal, mountainous, and desert areas and the main cities. MOTM02 argued that some areas in Oman still suffer from the lack of tourism services, such as Muscat, where tourism services are still at a basic level and insufficient for the visitor's ambitions. MOTM03 also emphasized that the country has a good infrastructure when it comes to roads, ports, airports, but tourism infrastructures (such as cafes, shopping malls, public toilets, and others) are not built or are incomplete. He stated, *"Although we had more than 3 million visitors in 2018. There is still more work to be done in the infrastructure in order to develop the country."* MOTM04 argued, *"The current infrastructure is not weak but in need of more complementary projects; roads connecting remote areas, budget hotels, more theme parks."* This should indicate there is a limited supply of public services and facilities, most of which are virtually non-existent.

7.11.1 Natural and Human-Made Attractions

Oman tourism resources have enormous potential for expanding the sector if they are well developed and managed. Unfortunately, the Sultanate's overall tourist resources are far from being appropriately exploited. All replies from the officials and private managers revealed that natural resources have not been fully-exploited, not even by 20%, especially in the mountainous and coastal areas.

Regarding diversifying the sector's activities, including heritage, historical, and adventures, MOTM03 mentioned that *"Adventure tourism is the new tourism activity in the tourism strategy to rehabilitate some mountainous and coastal areas in several places in the Sultanate, such as Jabal Al-Akhdar (the Green Mountain) and Jabal Shams (Mountain of Sun)."* Also, according to MOTMO04, the Sultanate has only recently become a new destination for wedding ceremonies, which attract many people from both Gulf and Asian countries, such as India. This indicates that adventure tourism and weddings might be new tourism opportunities in the development of the sector.

7.11.2 Visitor's Satisfaction and Experience

In addition to the provision of products and services, the tourism sector generates the best of what it possesses to enhance tourists' experiences. MOTM01 commented that, *"The Sultanate's status as a tourist destination offering tourists a unique experience, which is different from other countries."* Most of the officials and private managers stated that there is a match between the offered tourism products and services and the visitor's demands and expectations. For example, MOTD01 commented that, "*The current tourism products are not suitable for the visitor; there is a need to develop them better in order to fulfill visitor needs."*

On the contrary, other informants like MOTM02 revealed that "*There is no match because of the lack of tourism services and facilities such as transportation, and entertainment sectors which are not integrated."* He supported the statement by giving an example of camping areas where tourism services are still insufficient for the visitor's expectations. This indicates a contradiction among the officials regarding the visitors' experience and expectations.

7.12 TOURISM IMPACTS ON THE DEVELOPMENT OF THE TOURISM SECTOR

Almost all the officials and private managers interviewees believed that tourism produces positive impacts on the country's economy and society. On the contrary, the development of the sector can bring negative impacts for destinations. Many inbound tourists, particularly new to the country, might be ignorant of the customs of the Omani society, which could cause a disturbing effect, for instance, the price increases in real estate property, goods, and services, as well as other activities. The informants' replies revealed that the sector had witnessed some negative environmental impacts by locals and visitors, such as hunting, burning trees, clearing lands for hotels, resorts, and shopping malls. Hence, not taking any further actions to those negative impacts could cause severe future damages to the local community, environment, and economy.

Some of the interviewees, particularly the officials, attributed the low tourism socio-cultural effects to the government's policy of targeting high-niche tourism from specific markets such as the European market. They insisted that by adopting the selective tourist strategy, the government is protecting the environment (physical and cultural) by bringing the right tourists. According to the official informants, the government has also taken various actions to mitigate negatives impacts through imposing laws and regulations, conducting awareness programs to the local community and visitors through tourist offices, and punishing violators in cooperation with the concerned authorities, the ROP. In the context of preserving the natural and cultural environment, there was a proposal for establishing "*Police Tourism*" to look after the harmful practices conducted by the local community and visitors against the environment and society. However, this proposal has been suspended for years. Replying to Mr. Al-Kindi's inquiry about the Ministry's plan to deal with the immoral practices from some tourists, the Minister said that, *"There are reviews with the Royal Oman Police in terms of giving tourist visas to some nationalities."*

The officials and private managers emphasized that the negative impacts of tourism are still limited in Oman. They praised the efforts taken by the government thus far to protect the natural and cultural environments. They argued that although those negative impacts are currently at a minimum and cause little harm to the economy, environment, and society, they could increase in the future. They suggested reducing, if not eliminating, those impacts, through implementing awareness programs for the local community and visitors. In this regard, the government has been focusing recently on awareness campaigns and promotions to reduce the negative impact on society and the environment. MOTM04 confirmed the efforts which have been put in place by the authorities on education and publicity programs, commenting that *"The MOT, in collaboration with the Ministry of Education (MoE) and some private and public colleges, work towards raising public awareness about all aspects of tourism to achieve the required level of development."*

7.13 SUMMARY

This chapter presents the analysis of the viewpoints of the government officials and tourism businesses managers, and members of Al-Shura Council concerning the development and management of the tourism sector in Oman. The main themes such as the role of DMO, marketing and promotion methods, the state of development of the sector were addressed.

The next chapter provides detailed interpretations of the results along with theoretical and practical contributions of the research and recommendations for future research.

CHAPTER EIGHT: DISCUSSION, CONCLUSION, & RECOMMENDATIONS FOR FUTURE RESEARCH

8.1 INTRODUCTION

This chapter is the last stage of the research and discusses the findings of the literature review, as well as the in-depth interviews and survey questionnaires. In addition, this chapter highlights the contribution to knowledge and study (academic and practical), identifies limitations to the research, and ends the research journey with a set of recommendations for future research.

8.2 DISCUSSION OF THE KEY FINDINGS

This study provides a deep understanding of the current state of the tourism sector in the Sultanate of Oman, considering the latest developments, and where possible, identifying future challenges and emerging opportunities. The influence of tourism development on the country's economic development depends on the sector's contribution to the national economy, the extent to which it generates employment opportunities, and stimulates the development of necessary infrastructure. This also depends on whether the industry's development process is guided by a development strategy comprising policy and regulatory frameworks with sufficient resources to place the country in the global market.

The significant findings and issues of the study are critically discussed in nine sections. For logical progress, a tabulated summary of the general sections of discussion relates to the research objectives and questions are displayed in Table 8.1.

Table 8.1 Research Objectives, Questions, and Sections of Discussion

Research Objectives	Research Questions	Sections of Discussion
1. To understand the contribution, impact, and evolution of the tourism sector related to the economic development of Oman.	*I. To what extent are the tourism sector and economic development related?* *1) To what extent does the tourism sector contribute to the GDP?* *2)* To what extent does the tourism sector contribute to providing employment opportunities in the market? *3)* What are the impacts of the tourism sector on the development of the economy? *4)* What are the procedures and practices the Oman government must adapt to introduce a cohesive and economically viable tourism sector that contributes to a more developed economy? *5)* How have the destination resources been exploited in supporting Oman's economy?	8.2.1 Effective Management of Destination 8.2.2 Destination Development Planning and Policies 8.2.3 Competitiveness of Tourism Destination 8.2.4 Tourism Stakeholders Involvement in the Sector Development Process 8.2.7 Tourist Products and Services 8.2.8 Impacts of Tourism Development

Research Objectives	Research Questions	Sections of Discussion
2. *To highlight opportunities for attracting local and international businesses in tourism projects and investments, and to examine the contradictions and challenges facing the development of the sector*	II. *What are the factors impacting on investments in the tourism sector?* 1) What are the government incentives to the investors? 2) What are the challenges that need to be considered to improve investment in the tourism sector? 3) What kind of projects and investments have been done in the tourism sector? 4) To what extent do government laws and regulations affect investments? 5) How has Oman tourism responded to the competitive environment?	8.2.1 Effective Management of Destination 8.2.2 Destination Development Planning and Policies 8.2.4 Tourism Stakeholders Involvement in the Sector Development Process 8.2.5 Public-Private Partnerships (PPPs) in Tourism Development 8.2.6 Destination Marketing and Promotion Activities 8.2.7 Tourist Products and Services
3. *To examine how different marketing methods can be used by both private and public sectors to attract a higher number of tourists and become a preferred tourist destination while also enhancing the country's competitiveness by attracting new investors.*	III. *To what extent have the marketing strategies and programs stimulated visitors to visit Oman?* 1) What are the marketing strategies that the tourism sector has adopted to promote Oman regionally and internationally? 2) To what extent are the destination image and branding developed? 3) What are the tourism products and services that are provided to visitors? 4) To what extent are the visitor's demands and the destination supplies in agreement?	8.2.1 Effective Management of Destination 8.2.2 Destination Development Planning and Policies 8.2.4 Tourism Stakeholders Involvement in the Sector Development Process 8.2.5 Public-Private Partnerships (PPPs) in Tourism Development 8.2.6 Destination Marketing and Promotion Activities 8.2.7 Tourist Products and Services
4. *To assess the practices, regulations, and prospects of tourism destination management, marketing, and development by both the public and private sectors.*	IV. *What are the practices that public and private sectors should adopt to create collaborating environments?* 1) How have the Omani government policy and strategy affected the tourism section in Oman? 2) What are the enablers and barriers to the success of Oman Tourism 2040? 3) What is the extent of the partnership between the public and private sectors? 4) To what extent does the Omani government control the tourism sector? 5) To what extent does the private sector participate in setting visions and objectives?	8.2.1 Effective Management of Destination 8.2.2 Destination Development Planning and Policies 8.2.3 Competitiveness of Tourism Destination 8.2.4 Tourism Stakeholders Involvement in the Sector Development Process 8.2.5 Public-Private Partnerships (PPPs) in Tourism Development 8.2.6 Destination Marketing and Promotion Activities 8.2.7 Tourist Products and Services

Source. Author

8.2.1 Effective Management of Destination

In many developing countries, the considerable problem of tourism development is a lack of effective management, which leads to major issues. These issues, according to Krce Miočić et al. (2016, p. 104), are a misunderstanding of the tourism development process or the impossibility of its implementation, insufficient support of the stakeholders, bureaucracy, centralization, lack of guidance, wrongly defined priorities and goals, and conduction strategies.

In the Sultanate, the results showed a lack of effective management to implement the sector development strategy and to achieve its goals, for instance, Vision 2020 goals. There was no real follow-up of tourism projects and initiative programs in terms of quantifying implementation and achievement. The reason is related to inadequate organizational and managerial skills of government officials, lack of entrepreneurial behaviour among the local businesses, and insufficient cooperation and mutual understanding between various parties of the development process. Also, the lack of suitable planning, even when it exists, is implemented incorrectly. For example, the results showed that a large number of tourist sites still suffer from a lack of development and insufficient quality of tourism services.

8.2.1.1 DMO: Government Intervention in the Sector Development Process

The intervention of the government in the development process exists and supports the sector's contribution to economic development in most developing countries. According to UNWTO (2011), the role of the governments is to ensure the implementation of the industry development strategies, the stimulation, and the promotion of private investment activities. In other words, the government plays both leading and catalyst roles in the industry development process, where the private sector is either too apprehensive to invest or where the government itself is keen to bring the benefits of the industry to society. In addition, governments have grassroots knowledge of the destinations, access to financial support to obtain some developmental funding, and enforce the quality of the destination infrastructure and tourist products.

Throughout the interviews, the officials showed a high level of satisfaction, considering that tourism development, the centralization of planning and decision-making are regarded as a necessity by the government. According to 26% of the local respondents, centralization and bureaucracy in decision-making is the most challenging obstacle to the sector. However, they emphasised the need for more government support in building the sector. Therefore, without the government's desire to develop and promote the sector as a whole, the effective development of the destination will not, in all likelihood, be satisfactory. However, the development of the sector should preferably not be placed entirely in the hands of the government. This is because some governments often fail to prioritize the industry and its potential contributions to economic development. They are weak in controlling the industry due to the pressure from the local community as well as insufficient funds for guiding the national development process. Such pressure and influence make tourism management and development immensely tricky.

Generally, the government of a developing country has an essential role in ensuring an enabling environment for tourism development. In Oman, the MOT is the centre of all actions concerning the development process of the sector. However, the highly centralized and rigid public administration system might lead to the state being ineffective in responding to problems of the sector (Tosun & Timothy, 2001, p. 354). The findings indicated that the main problems of tourism development are related to highly centralized state administration, which leads all decisions and implements plans, and which may not take into account the local conditions. A respondent from the local community commented, *"Although we have got a lot for the development of the sector, we do not have professionals, good mindsets, in charge of developing the sector."* The planning and decision-making processes are still centralized in the Ministry's headquarters in Muscat. The Ministry has regional offices (General Directorate of Tourism) in different regions and governorates within the Sultanate. The role of the directorates still does not meet the supervision and follow-up of the implementation of small projects in their areas.

The government has a range of responsibilities towards the active development and management of the industry. Swarbrooke (1999) outlines that the challenges for managing and marketing tourism destinations at any level local, regional and national, are the overlap and possible duplication of destination marketing and management functions and a conflict overtourism policy between government authorities. The findings showed that the lack of the completion of project work among government departments is due to the independence of some and the dominance of others on the projects. Therefore, the MOT should not take all the blame for the complexity or delay in procedures. The research findings revealed that there is an absence of effective communication channels and confusion among the decision-makers participating in the sector. This is due to limited cooperation and coordination between parties, which in turn causes the private sector and other government departments to be ignorant of each other and do not to participate in the sector development process, which would then not contribute to successful tourism development. For example, the management of festivals such as the Muscat Festival and the Khareef Salalah are controlled by Muscat and Dhofar municipalities where the heritage sites, forts, castles, and museums, are under the supervision of the Ministry of Culture and Heritage (MOCH). This minimizes the participation of the MOT in developing the festivals and other tourist entertainment activities. Besides, tourist entertainment activities and facilities are licensed and regulated by the municipal government such as Muscat Municipality, while the Ministry of Commerce and Industry (MOCI) monitors souvenir shops. Hence, the traditional bureaucracy has to be abandoned and replaced with effective collaboration to improve coordination between decision-makers (government authorities) in the sector development process. The results affirmed the importance of in-depth collaboration between various government ministries such as the MOT, the HOCH, and others, in better integrating management policies, marketing activities, the quality of tourist products, as well as assisting in the maintenance of tourism resources and attractions, thus ensuring higher sustainability of future tourism development.

Even though the involvement of the private sector enhances tourism development and complements government efforts, the tourism industry fully runs from the perspective of the government, not the private sector. The governments of many developing countries are still the dominant player in ensuring the success of the tourism industry. When funds are required to support investment in tourism, the government is often the only agency able to raise or guarantee the loan (Di Ciommo, 2007, p. 59). According to Jenkins (2015, p. 146), the reason is that governments encourage investment in tourism for mainly economic reasons. Firstly, at the national level, tourism generates foreign exchange earnings, and through taxation and other fiscal measures, contributes to government income. Secondly, it creates employment and entrepreneurial opportunities. Thirdly, it attracts foreign direct investment, thus stimulating national development. The study has shown that in addition to supporting and funding many tourism projects and programs, the government assists in the availability of finance and venture capital to local tourism developers. The government also has the responsibility to provide suitable tourist infrastructure and services for development to prospective stakeholders, for instance, private sector developers, OMRAN Company in Oman. However, quite often, these services are not up to standard in developing countries (Van Niekerk, 2014).

In some destinations, particularly developing ones, the slow state of tourism development is attributed to a lack of participation and involvement of the private sector. While the Omani government sees the slow pace of the development of the sector caused by the reluctance of the private sector to make significant investments in the sector, the private sector blames the complexity of government policies and regulations. According to about 23% of the community respondents, the primary hindrance to the development of the sector is the complexity of policies and procedures set by the government. This is also obvious from the interview results that both sectors have been trying to blame each other for causing the slow pace of development. The interview results also showed that although the private sector is essential in developing the sector, it has shown to have a modest involvement and contribution, which requires improvements. In Oman, the private sector is still under government control, and its involvement is still limited to certain activities and does not have more space to participate.

Some local respondents urged that the sector planning process should remain only in the hands of the government. The tourism business informants' replies showed that the private sector has been suffering from the complexity of rules and regulations that do not reflect the sector requirements. Giving an example of the complexity of investment laws and a long list of requirements that may have stopped many international companies from investing in the sector, some government ministries have shown reservations toward some tourism projects, causing a delay in their completion.

8.2.2 Destination Development Planning and Policies

The development process of the tourism industry is achieved in a well-planned and controlled way. Thus, effective management is needed to identify and integrate suitable policies and planning (strategies).

8.2.2.1 Destination Development Planning

Tourism development planning is concerned with achieving optimum economic, environmental, and socio-cultural outcomes at any level of the destination. The government planning approaches are to protect local culture, heritage, and lifestyles, as well as nature, by preserving these points as principal elements in its tourism. In this regard, to offset the negative impacts, any tourism development strategy has to be integrated into the country's socio-economic policies, the natural and built environment, socio-cultural traditions, other related sectors of the economy and their financial schemes, and the international tourism market (Costa, 2019; Tosun & Jenkins, 1998, p. 354). Thus, without considering the development strategy, many socio-economic and environmental problems will emerge as obstacles to implementing the principles of development (Tosun & Jenkins, 1998, p. 354). The shortcomings of the public administration systems and a lack of comprehensive development at local and national levels are the cause of the defect in planning approaches to tourism development (Tosun & Jenkins, 1998). Many developing countries have not been successful in their tourism development, which has been attributed to, among other matters, inadequate or non-existent planning frameworks for tourism development. The negative consequences of lack of tourism planning are that the industry is disorganized. According to WTO (1980, p. 5), 43.5% of 1,619 assorted tourism plans were never implemented (Tosun & Jenkins, 1998, p. 353). Thus, destinations with no development planning or strategy can suffer from economic, social, and environmental problems, in addition to a decline in their competitiveness as a tourism destination.

For an effective tourism planning strategy, destinations must regularly formulate strategies to mitigate threats, take advantage of opportunities, or respond to change to achieve a competitive advantage (Aquilino & Wise, 2016, p. 24). Tourism development must ensure the involvement of various stakeholders to minimize the conflict among planners and developers of destination development. Besides, destination managers and policymakers must explore the major symptoms that cause lack of tourism planning. As illustrated in Table 2.5, these symptoms have various impacts which may result in destination management challenges. With reference to Oman, the tourism sector is a new phenomenon that requires careful planning from the country's authorities to avoid any negative consequences that may surface at different tourism development stages. As the MOT (2005) stated, the government is aiming to enhance its tourism development by creating the right strategic planning and development of its tourism resources. However, developing countries are often anxious to plan, but lack the discipline and implementation. Therefore, appropriate implementation of the strategies requires the participation of all stakeholders to ensure their success to maximize benefits and minimize the cost of tourism development. In Oman, this aspect still needs to be improved, particularly in the context of the increasing number of tourism investments and projects in the country.

Tourism development strategy supposedly copes with rapidly changing socio-cultural, economic, environmental, and other conditions under which the tourism sector operates. As a result, the tourism planning approach may be used to pursue national development objectives through the encouragement of development in certain areas rather than others. In some instances, the geographical spread of development of the tourism industry might be restricted to limit some of its socially disruptive impacts, or areas with high tourism potential might be designated for government support (Brohman, 1996, p. 62). In Oman, the government has encouraged a more geographically dispersed pattern of regional growth by planning tourism projects and complexes (e.g., Dhofar, Al-Wusta, Musandam, and Al-Sharquiyah) in outlying and economically depressed areas. Importantly, these investment projects must be appropriate, viable, and environmentally sensitive. However, the sector's current projects and investments might not be enough to reflect the strategy (NTS). The results revealed that some tourism projects and investments have no time limit, which affects the goals of the strategy. A respondent from the local community argued that *"The national strategy might be wrong, or at least there is no follow-up."* As a result, this might lead to extend the time limit (25 years) depending on the efforts of a weak management in implementing the strategy and achieving the goals.

8.2.2.2 Destination Policies and Government Legislation

Tourism development requires government legislation to manage tourism issues in any destination (Gunn & Var, 2002), such as the nature of the culture of the local community, parties participating in the tourism development, and the economic situation of the destination (Hall, 1994). However, in developing countries, the formulation of policy and planning for tourism has usually been the role of the government, with limited involvement of the private sector (Jenkins, 2015, p. 151). In Oman, the government pursues the policies to promote tourism activities and to ensure that it contributes to the country's economy. However, the TANFEED (2017) report mentions that the Sultanate has lacked a consistent national policy on the tourism sector. The findings revealed that the policies adopted by the government to promote the sector are insufficient or ineffective in promoting the upgrade of the tourism sector to global competitiveness. Thus, for the government to ensure that the most effective policies are implemented, the findings emphasized that it is important to continuously revise and adopt the regulations and policies in the most appropriate way to ensure the development of the sector. However, the government should develop these policies in close co-operation with the private sector (Brokaj, 2014, p. 110). Moreover, the results showed that the local community's opinions were ignored. There was no explicit government legislation to provide them the best outcome or benefit from tourism development in their areas. Therefore, to reveal and solve any unforeseen issues caused by tourism developments, governments should enact legislation suitable for the local community protection of any obstacles or impacts that tourism development may cause. In this aspect, the tourism legislation needs to be revised to meet the fast-changing needs of tourism development to provide balance in the sector by collaboration between the sector stakeholders. This could happen if the government (along with other stakeholders, including the local community and businesses) discussed informal committee meetings and community-oriented workshops, "local community" needs and concerns relating to the proposed tourism development.

8.2.2.3 Tourist Selective Strategy

The government of the Sultanate has adopted a selective tourist strategy to control its tourism development and to avoid mistakes that other developing countries have made in developing their tourism sectors. The strategy mainly focuses on attracting responsible and high-spending tourists. The government also works on developing only tourist activities and public facilities that can best be integrated with minimal impact on society and the environment. However, the research results revealed that the government's efforts and initiatives in developing the tourism sector were below expectations. The number of tourists has increased to the country, but not as projected in the sector development strategy because of major weaknesses (see *Table 5.4*). Unfortunately, the figures are still far away from the world tourism organizations' figures (UNWTO and WTTC). For example, at the beginning of the 1990s, the government predicted the number of tourists would reach 10m by 2010, which did not happen. There were about 1.5m tourist arrivals. Later, the government prediction, in Vision 2020, was to attract 12m tourists in 2020. Unfortunately, the number did not exceed 3.5m visitors in 2019.

With reference to the best interests of the country's economy, according to the results, the Sultanate cannot be selective all the way and at all times. As some officials and business informants suggested, the new trend should focus on various tourist segmentation and more on tourism investments in addition to adapting the selective investment rather than tourist selective strategy or an open-door strategy.

8.2.3 Competitiveness of Tourism Destination

The changes in the tourism industry globally force destinations to focus on the development of competitive advantages and elements that ensure the better positioning of a tourist destination. Fabricius, Carter, and Standford (2007, p. 9) state that 2 requirements are critical for destinations to achieve competitive advantage over their rivals, namely; 1) establishing a unique and robust positioning, i.e., offering a different kind of experience compared to other destinations, and 2) delivering excellent quality experiences and superior value for money (Shirazi & Som, 2011, p. 81). Nevertheless, a destination with abundant and diversified resources may not be as competitive as another destination, which has relatively limited resources but can effectively utilize these resources.

The competitiveness of any destination is affected by the competitiveness of other destinations (Ritchie & Crouch, 2010, p. 1064). Like many developing countries, the Sultanate finds itself in a very competitive environment with destinations in the region, with only 5.6% of the Middle East tourism market, in the area of family and nature tourism such as the UAE, Qatar, and Bahrain, are trying to cultivate the same markets. Henderson (2015) asserts that for 78% of tourists the primary purpose of travelling to Oman is for leisure, compared to visits for business, education, and employment. The Sultanate is characterized primarily by leisure visitation, while countries such as Bahrain and Qatar have historically been predominantly characterized by business visitors (Choufany & Younes, 2005). It is well known that intense competition between neighbouring countries or destinations in close regional proximity is not a new phenomenon (Mansfeld & Winckler, 2008). Such competition is generally based on product differentiation, price policies, and, to a lesser extent, new product development. In this regard, to develop the Sultanates' competitiveness, the MOT has implemented some initiatives to improve the working environment in terms of modernization, such as implementing the sector laws and regulations, simplifying investment procedures, and preparing a comprehensive study of the impacts of integrated tourism complexes (ITC). In addition, a full digital transformation project was launched for the sector in cooperation with the Information Technology Authority (MOT, 2019). The findings also highlighted 2 key issues determining destination competitiveness: the availability and quality of destination resources and the need for effective management and marketing. However, despite the fact that the Sultanate has enormous natural and cultural resources, as well as tourist attractions that provide sources of comparative advantage, according to the findings, they were not being used to achieve a competitive advantage. About 34% of the local respondents assured that natural resources and attractions are a point of strength of the development of the sector.

Moreover, the Sultanate, although experiencing increased visitor numbers, is ranking a lowly sixth among the most popular GCC countries (GCC-STAT, 2019). This is mainly due to the Sultanate's inability to position itself and competitively promote and market itself, as a cultural and natural destination among other destinations in the region. Despite the noted improvements in the sector, neighbouring countries still pose a threat to Oman's bid to become the regional hub for tourism. Those countries have shown success in the field of tourism, which overtakes the Sultanate by providing the infrastructure that is compatible with the progress in the global tourism market. Neighbouring countries like the UAE, Qatar, and Bahrain are focused on the tourism market of "Sun and Beach," and by doing this, they have increased the competition in this market heavily. In addition, both the UAE and Qatar are strong competitors against Oman with strong marketing of infrastructure and tourism services and entertainment activities. A key contributor to successful tourism development in the UAE or Qatar, for example, can be attributed to the existence of their marketing and promotion frameworks that ensures that regular marketing activities and promotion schemes are implemented in the main tourist generating markets such as Europe and Asia. For instance, Dubai is considered (as of now) the hub for tourism by having enormous investments in tourism infrastructures such as accommodation, entertainment, and recreation facilities that attract millions of visitors from all over the world. Nevertheless, the tourism policy of Oman recommends that the Sultanate become a complement to the UAE, for example, instead of competing in an attempt to share knowledge but rather complement each other's experience on tourism development. In this regard, the need for close co-operation instead of rivalry among destinations in the same region would develop competitive destinations.

The findings demonstrated that the Sultanate's tourism growth has seen to be slow compared to neighbouring countries, so it separates itself from a heavily competitive market with declining potential and low-profit margins. Nearly 25% of the local respondents assured that the lack of distribution of tourist services in many tourist sites is the biggest weakness in attracting visitors to the Sultanate. The large amount of money spent by neighbouring countries on developing their tourism sector, in terms of tourist infrastructure and activities, has overshadowed Oman's development. Those countries offer similar tourist attractions and experiences and promote even better services than available in Oman, which is reflected by the number of tourists. For example, the UAE received around 15.8m international tourists, while Oman only managed to attract around 3.3m (UNWTO, 2018). Regardless of intense competition in the region, the Sultanate has a unique opportunity to be superior to all its neighbouring competing destinations in terms of quality, diversity, and visibility of tourist attractions and facilities. About 89% of the visitors' respondents believed that the Sultanate has the potential to compete with neighbouring destinations in the region. This necessitates making changes in the marketing and promotion strategy as well as developing the destination attractions and resources in a way that highlights its unique characteristics. In addition, Oman needs to be organized in a way that the integration of the destination infrastructure and tourist products; in addition, the country's geographical location has become its main core competencies.

The quality and variety of tourist products and services, as core attributes to evaluate the development of the sector, they are significant for the local community and visitors' satisfaction in the tourism market. According to 84% of the visitors' responses, the quality of services and products offered to visitors was ranged between good and excellent. However, the findings showed that in order to compete with other destinations and attract tourists in the global tourism market, the government needs to focus on the provision and quality of the infrastructure and supporting facilities in many remote tourism sites to fulfil the local community and visitors' needs and go beyond their expectations. 34% of the local respondents believed that the level of service quality provided within the sector is the fundamental weakness in the development of the sector. A tourist destination cannot be highly competitive in the absence of competitive tourist products, while tourist products cannot be competitive in an unattractive tourist destination (Mazilu, 2012a). This is vital as Oman is trying to be selective in its strategy for attracting and welcome higher spending tourists and is building substantial tourism projects to accommodate them. This was stated as one of the main objectives for *'Vision 2020'*. According to a government official, the tourism development projects have helped to improve the quality of public services to be able to compete with other destinations. In addition, it emerged from the interviews that the decision-makers are promoting the idea of improving the quality of services in the sector in order to present Oman as a competitive destination. To support this, one of the government officials confirmed this issue by stating that: *"The government is working hard to improve the services in the tourism project."*

8.2.4 Tourism Stakeholders Involvement in the Sector Development Process

Tourism stakeholders' involvement is significant for the success of tourism development, particularly in the early stages of tourism development (see *Figure 2.5*). For example, the local community must be mainly involved in all planning, decision making, and implementation processes. However, DMOs often experience difficulties among the industry's stakeholders because of conflicting priorities, interests, roles, needs, and even the degree of support other parties have for the tourism industry. Manente and Minghetti (2005, p. 230) argue that stakeholders with diverging interests and different perceptions of the destination make it very hard to plan coherent development of the destination. Meyer and Meyer (2015, p. 200) state that a lack of co-operation between government, communities, and stakeholders is customarily one of the proceeding obstacles in tourism development. Significantly, these issues arise more in developing countries where some parties, such as the private sector or the local community, gain less benefit from tourism.

The study has shown that nearly all respondents thought that tourism organizations in the Sultanate need more mutual support to achieve the development goals of the sector. In this regard, destination managers need to develop a destination management structure with a transparent communication process that links all relevant stakeholders seeking their involvement in the delivery of the vision for tourism destinations to succeed. This makes it essential to prioritize coordination between different levels of government and other stakeholders to ensure that objectives are aligned. Furthermore, limited awareness, insufficient expertise, and improper planning and policies may create misunderstandings and incompetency among stakeholders participating in the sector development process. This matter appears to be a major issue in tourism development in Oman. Timothy (1998, p. 54) emphasizes that for a destination to be successful, tourism development in a region might require coordinated efforts between two or more levels of government. Riege, Perry, and Go (2002) also emphasize that tourism development issues are best resolved through partnerships between destination stakeholders rather than through competition. As a result, a combination of cooperation and partnership would guarantee the success of the industry development process and eliminate some overlap of services and parallel planning, which will improve efficiency regarding time and money. As Hall (1994, p. 33) commented, *"coordination is necessary both within and between the different levels of government in order to avoid duplication of resources in the various government tourism bodies and the private sector and to develop effective tourism strategies"* (Timothy, 1998, p. 54).

The involvement of the local community is fundamental to the effectiveness of tourism development and management, including planning, decision-making, and the operation of resource reserves. Cater (1994) highlights the need for local community involvement in planning and managing tourism, particularly in the context of developing countries (Witchayakawin, 2017, p. 87). However, some developing countries, including Oman, have been struggling to resolve the issues of the local community's attitudes to tourism development. In Oman, the study found that involvement and participation between stakeholders involved in the sector were ineffective, where the private sector and the local community were not effectively participating in the sector development decision-making with the government.

While the government in Oman assumed that the local community is participating in tourism development, the local community argued that it is not. The local community's comments revealed that there was little collaboration and involvement of the community members in the tourism development process. The locals' involvement has limited empowerment enough to participate and influence the planning and decision-making process in the sector. It appears that the local community had not been practically and directly involved in the planning, managing, operating, and development of the sector. This revealed that the government had not, to date, co-operated with the locals to their fullest potential and benefit and also, perhaps, more importantly, were not fully aware of the importance of the local community's participation in the development of the sector. Moreover, the local community was not fully aware and knowledgeable about the state of the sector development. Some of government official informants pointed out where the development of tourist sites might pose a conflict of interest within the local community and therefore delayed the realization of the projects. So, it seems that the government's policy was built around seeking stakeholders' consultation rather than involvement and active participation. The findings revealed that the most critical barriers to the local Omani community's involvement in tourism development were lack of awareness, consultation, and collaboration. Such lack of coordination and integration among the stakeholders has caused a failure to implement tourism development strategies. For example, the local community in some tourism projects were not effectively consulted, which may cause rejection and objection.

Although both the government and the private sector could have greater involvement in contributing to the development of the workforce for the tourism sector, the sector showed slow growth in the number of Omanis who joined the sector. The decrease could be due to the inclusion of some activities in other sectors, lack of general awareness of the sector, and socio-cultural pressures. Furthermore, the TANFEED (2017) report shows a gap between demand and supply in the labour market for the tourism and hospitality sectors that are reflected in the sector's low Omanization numbers. There is an apparent lack of qualified Omani competencies for tourism jobs with managerial and higher skills. Another reason is that there is a general perception that Omanis do not view tourism as an attractive and safe career path. This has had to do with the negative perceptions held mostly by Omani youth towards the sector, including low job security and little prospect for career development. In his meeting with the Al-Shura members, the Minister of Tourism stated that the lack of Omani employees in the sector is due to many Omanis preferring to work in other sectors than tourism, and not because of the work environment. Subramoniam, Al-Essai, Al-Marashadi, and Al-Kindi (2010) found that staff turnover in the hospitality sector is high as the majority of employees working in this sector are young and make career changes after working for a short while.

The participation of the private sector and the local community in tourism development requires support and empowerment from decision-makers and planners of the sector to contribute and benefit from such developments. According to the official informants, the government has devised policies to encourage the participation of local people and the private sector in tourism development. However, the findings revealed that although the government is aware of the importance of the private sector and the local community participation in tourism development, they both tend to participate at a limited level. Getz and Timur (2005) and Marien and Pizam (1997) argue that the local communities might be encouraged, but have not been fully engaged by the government and businesses to take on active roles in the process of tourism development from planning to implementation and operationalization (Kimbu, 2010).

Some of the main reasons given for the lack of participation and involvement in the sector development by the local Omani community were: the government and the private sector feel that the local community is incompetent, inexperienced, and unqualified concerning tourism as tourism is new to the country compared with other well-known tourist destinations in the region. Another reason is that the local community, mainly Omanis, resists tourism development for cultural and environmental reasons. The findings also revealed that the lack of co-operation between development parties (government, businesses, the local community) results in the inability to create an essential wide range of tourist products and experiences, which are crucial to strengthening the competitiveness of the destination in the region. Al-Shaaibi (2011) explores local residents' participation in tourism development in the Sultanate of Oman through a case study of the Wave Muscat project. Although Oman is endowed with all the elements of a highly-competitive tourism destination-rich cultural-heritage waiting to be explored, local residents do not benefit by participation in tourism development due to lack of experience (Al-Shaaibi, 2011). It has been emphasized that if the community is left out of tourism development and its resulting benefits, they are more likely to perceive tourism and tourists as threats. There is, therefore, an on-going link between the local community, government and private businesses, where one cannot function without the other.

Results suggest that community participation and involvement would reduce the negative attitude of tourism as well as help to understand the tourism development process and its benefits. In this regard, destination policymakers should ensure that they involve the community in their decisions, taking their needs and desires into account within the development process. As a result, the aforementioned will improve the linkages and result in a multiplier effect of tourism on the economy (Phiri, 2016, p. 50). Also, the private sector may favour more community participation on all levels as it means that most community approvals could be obtained before the planning, development, or implementing stages of a project, thus minimizing unforeseen obstacles and avoiding financial losses.

8.2.1.1 Local Community and Visitors' Satisfaction

The local community or visitors' satisfaction is increasingly becoming a prominent issue in most service industries, including tourism because their satisfaction can cause a positive or negative influence on the choice of destination, the consumption of products and services, and the decision to return. For example, the visitors' involvement and interaction in various tourist activities influence the overall perception of their tourism experience and satisfaction at a destination. According to Wang and Pizam (2011), the increasing competition among tourist destinations over the last several decades has prompted concern among destination marketing managers and industry practitioners about the perceptions of a destination by tourists (Shapoval et al., 2018). This has also become increasingly important for various tourism organizations that could lead to a repeat visitation as well as recommendations for new potential visitors. The analysis of the study confirmed that visitors' who have positive experiences are more likely to recommend destinations they have visited to their friends and relatives or express favourable comments about the destination (see *Section 6.2.2*).

In contrast, dissatisfied visitors may not return to the same destination and may not recommend it to others. They may express negative feedback about the destination and damage their market reputation. In this aspect, Stevens (1992) emphasizes that the satisfaction or dissatisfaction of visitors with various aspects of the destination, affects their choice when considering alternative destinations, the amount spent during the holiday, and the decision to repeat the visit. Also, Shapoval et al. (2018, p. 312) see that the marketability of destinations as well as the offered services leaves an impression on visitors in terms of their sense of satisfaction and their decision whether to come back in the future. The analysis of the study indicated that the overall satisfaction with the Sultanate as a tourist destination was somewhat negative. Despite the increasing numbers of visitors to the Sultanate, there is a lack of understanding of the needs, expectations, and satisfaction in the sector. The results found that the local community and visitors were both dissatisfied with the development level of the destination (tourist) infrastructure and the utilization of tourism resources (natural and human-made). Therefore, their positive and negative impressions of the destination’s development process should assist those who are responsible towards the development of the sector. The local community should also support tourism development when they are expecting benefits from tourism activities. The greater involvement of the local community in the decision-making processes results in creating high-quality and value in the destination. The findings reveal that the majority of the local community, even for those who do not work in tourism (67%), have benefited from tourism development, and they have a positive attitude and perception towards the development of the sector.

Ritchie and Crouch (2003) effectively point out that the fundamental product in tourism is the destination experience. Tourism experiences at a destination focus on what a visitor derives from what the destination is offering regarding products and services. Having a pleasant experience for visitors is an important factor for the success of a tourism destination. The findings indicated that visitor’s responses (81%) were delighted and mostly satisfied with their travel experience in Oman. Buhalis (2000) urges that DMO managers need to appreciate tourists’ motivations to develop the appropriate offerings and brand destinations for the right target market. Visitors’ motivations are multiple, where they hope to experience more than one activity at a destination (Solanki, 2011). The fundamental motivation driving a visit to a given destination is a range of attractions and the overall experience. This understanding will assist destination managers in streamlining their operations to incorporate enjoyable activities/experiences, which will enhance the quality of the tourists' experience. The study presented factors both affecting and motivating the current and potential visitors on the destination, including destination infrastructure and services, and tourist attractions and activities. The study found that visitors were delighted with the natural sites of the country, but not with other provided facilities such as transportation. Natural attractions are a competitive advantage to the Sultanate and should be highlighted while promoting it as a tourist destination. Thus, destination marketers should capitalize on this competitive advantage in positioning the Sultanate as a natural, eco-tourism destination. Besides, it is essential to provide various facilities to visitors and to pinpoint the causes of their dissatisfaction and areas requiring special attention. Recreational facilities and locations, for instance, need to be expanded as presently they become overcrowded during the peak season. About 35% of the local respondents stated that the main focus of the sector development should be on creating more entertainment projects (e.g., shopping malls, theme parks, etc.) established all around the country.

Developing countries with rich natural and cultural resources possess significant comparative advantage to attract tourists in search of new experiences (Wahab, 1974). Such an experience can be highly affected by a range of tourist products and services. The UNWTO (2007) report deepen the concept affirming, *"To compete effectively, destinations have to deliver wonderful experiences and excellent value to visitors."* Therefore, a destination that offers a diversity of visitor experiences is in a better competitive position than one that has a limited number (Wray et al., 2010a). A destination where the adequacy and effectiveness of tourist products ensure visitors have a memorable tourism experience that meets or exceeds their expectations while maximizing the benefit to the destination will surely be in a more competitive position. The findings showed that more than 80% of the visitors' responses stated that their visits to Oman have matched their expectations. In this regard, Pearce (2016a) emphasizes that the multiple functions relating to demand and supply should be working in partnership to make sure that there are no gaps or failures in the provision of the visitor experience. This is that since destination managers control the resources of the destination, they have an impact on how the experience will be perceived by visitors. Consequently, for the success of the destination, the need to meet visitors' expectations require innovative safeguarding, both natural and cultural resources, as well as a community identity.

8.2.5 Public-Private Partnerships (PPPs) in Tourism Development

Over the past two decades, governments have come under increasing pressure from the major international development agencies not only to involve the private sector in these activities but also to give it a leading role (Jenkins, 2015, p. 151). The effective functioning of PPPs plays a pivotal and complementary role in rectifying and speeding up the pace of the tourism development process, mainly in implementing investment laws; building and managing the required tourist infrastructure and services; engaging the local community in tourism projects; and ensuring protection of destination resources. Also, the PPPs have to make sure that in managing the development of the tourism sector, the development strategies are implemented only after actively consulting the concerned stakeholders, including the local community.

In Oman, the government strives through the MOT to promote and support the development of the tourism sector. However, the government cannot achieve this alone. The findings indicated there is a need to create a favourable investment climate to attract private investors through creating investor partnerships, promoting destinations to investors, and decreasing planning regulations. Therefore, with PPPs, the MOT collaborates with the private sector in the development of the tourism sector through setting plans and strategies, providing lands for investment and public services, improving tourist products, facilitating policies (investments procedures), encouraging tourism investments and projects in different areas. The analysis of the study showed that the government has offered incentive programs that increase the number of investors in the sector. These attractive activities are 50-year renewable leases on land, reduced rental rates, low-interest soft loans with repayment grace periods, income tax relief for up to 10 years, no restrictions on capital import and profit transfers, and up to 70% foreign ownership of most projects (up to 100% in exceptional cases). Nevertheless, this will not be that easy in the Sultanate environment at all. The analysis of the study also showed that the partnership might experience a high rate of abandoned tourism projects or poor implementation, which may seriously affect both the government and businesses if countermeasures are not secured.

For most countries without financial resources, tourism development is usually reliant on government funding or through investment from foreign sources such as development agencies, bilateral assistance funding, the World Bank, and private inward investment (Jenkins, 2015, p. 149). The government involvement, via direct incentives, could be made possible for significant tourism projects through the provision of direct loans or grants to private developers or support the project by assisting with professional services. However, the government's financial incentives to the private sector depend only on the availability of financial resources and the government's attitude towards complementing private investments with public investment (THR/MOT, 2016). Despite the country's economic situation due to the slump of oil prices, the government is putting much effort into supporting investment in the sector by providing all supports and incentives. Foreign and local investors were given assurances to proceed with their projects and investments in the sector, according to MOT (2019) statement.

Most investors, who are building hotels, resorts, or planning to, pledged to continue with their projects. In addition, the official interviewees' replies revealed that there is no difference between local and foreign investors in terms of the provided facilities and incentives. Although both local and foreign investors receive the same incentives and support, in some cases, the local investor has the advantage to receive fast-track loans from local banks after obtaining the government, and concerned ministries, approval of the project. However, the private sector informants insisted that the incentives the investors receive from the government are below the required level and that massive investments deserve unique treatments. However, those investments sometimes face bureaucratic complications from different authorities and objections from society.

The investments in the sector are not only to develop infrastructure, but also geared towards increasing the quality and availability of tourist products in making the Sultanate attractive and, in so doing, generate a positive tourist experience. However, these investments require approval and financial support from the national government, in addition to coordination between multiple governmental authorities. The findings revealed that the private sector in Oman still depends on government financial and logistical support. According to some officials, the MOT provides non-subsidy support to national companies through their assigned projects and assists in finding donors for the projects. However, some of the private informants argued that the government could not offer much support to all tourism businesses, particularly new start-up SMEs because they were running on a tight budget. A respondent from the local community commented that, *"There is weak support for small and medium enterprises, which may affect their potential investment in the sector."* Thus, the only support offered to the local businesses was limited technical and financial assistance in irregular seminars and workshops organized by the MOT and other government departments. These were aimed at educating the small companies on how to set-up, manage, and monitor their tourism operations. All the interviewees believed that the lack of adequate support for the private sector from the MOT was partly because of the lack of effective tourism management and as well as the economic crisis in the country. Therefore, some businesses are found not interested in collaboration as they believe that their activities will not provide enough profit.

More significant investments in the tourism industry will not merely build productive capacity in the destination, but also can drive the long-term profitability, innovation, and competitiveness. However, the Omani government is not able to motivate and convince potential investors to consider the necessity of further development. Some of the local respondents in the survey commented that the incentives and benefits given to businesses to invest in the sector are limited and not enough compared with others in the region, such as the UAE and Qatar. According to the MOT (2019) statement, all tourism businesses must be registered and update their business profiles in the Ministry's tourism database. However, many tourism businesses have not registered or updated their profiles. Another example, some hotel establishments have shown a weak collaboration with the Ministry in disclosing their real revenues, which may lead to a loss in tourism fees and affect the sector's contribution. This indicates that the private sector may not collaborate due to the lax application of the law and policies on those businesses, or there might be hidden funding or patronage that supports those violators, such as corrupt government officials. As agreed by most of the informants, most businesses are owned by people in the government and they cover-up their violations. Furthermore, the findings indicated that the rate of the mutual organization and coordination of activities in the frame of the partnerships is low. Many tourism businesses, as addressed in the results, were not often consulted before the Ministry made significant tourism decisions. Some business informants insisted that the government makes decisions, imposes policies, and launches tourism products without taking into account all tourism businesses' viewpoints. Providing Omanization in the sector as an example, the government forces businesses to hire Omanis over non-Omani workers, however, some Omanis are not qualified to replace the ex-patriot workforce resulting in poor service. Another example is a circular from the MOT in collaboration with the MOM that was given to all tourism businesses not to recruit non-Omanis as translators (tour guides). The problem that arises from this is that there is a lack of Omanis who speak foreign languages other than English, such as Russian, Japanese, French. A point of agreement among the officials and business manager interviewees was that there are many tourism operators, in particular, those who joined the sector recently who are not trained professionals. In this regard, PSM06 commented, *"The private sector is not well-organized in terms of tourism businesses; as a result, any person can now enter the sector with no conditions and terms determining if the person is qualified or not."* This raises the issue that the new tour operators and guides lack the necessary training and expertise in the tourism, leisure, and hospitality industry. Many acknowledged this themselves that they had ventured into the sector out of curiosity and the monetary advantages they thought the sector offered.

8.2.6 Destination Marketing and Promotional Activities

Destination marketing and promotional activities have a significant influence on the development process of the tourism industry as well as a visitor's decision on destination selection. In cooperation with the private sector, the MOT has been running many tourism programs such as various religious and national events, tourist seasons (e.g., the autumn season, Khareef in the Dhofar Governorate), and official holidays which introduce the importance of the sector and attract domestic and international tourists. The findings indicated that the marketing and promotional methods that the government has adopted in marketing and promoting the Sultanate are still below global expectations. The informant tourism managers urged the need to review the current government marketing strategy and promotion methods in order to promote the sector in international markets. In the survey, some of the local respondents commented that the current promotion and advertising methods, such as participating in international exhibitions, are limited, and did not reach the expectations to represent the Sultanate internationally. According to the MOT, the limiting factor for Oman to achieve a higher rating as a competitive destination was the need to improve the interrelated issues of competitive marketing activities and promotion methods. This shortfall is confirmed by this study's result on the need for competitive marketing strategies to enhance tourists' visitation to the Sultanate. Also, it was found that to target the market appropriately, the current promotional methods need to take a 360-degree turn regarding identifying what the country is precisely marketing, and to whom and where. However, this process requires spending and investing more in marketing and promoting the sector. In this regard, the government has to use a comprehensive and consistent approach across all marketing and promotional methods.

Destinations with limited financial resources for marketing their tourist activities are facing severe difficulties in producing an impact on the tourist market. The study demonstrated that the Omani government, since the 1990s, has been seeking to increase its global status through promotion and marketing by hosting international conferences and participating in global tourism exhibitions. By following the UAE and Qatar's strategy, the government has recently removed visa requirements for tourists from India, China, and Russia, but there are still entrance constraints, according to the Times of Oman (TimesofOman, 2017a). Consequently, simplifying visa applications and raising awareness would have reflected positively in the form of increased visitor numbers and higher rates of tourism-related expenditure. Furthermore, the Sultanate opened two representative offices in Russia and China to expand its domains in Europe and Asia. This may require investing more funds from the Ministry's marketing budget because the current budget for marketing may not be enough if it intends to compete globally. Also, to increase destinations' demand during the low season, there is a significant need for targeting appropriate market segments (e.g., wealthy and responsible tourists) to assist the reduction of seasonality as well as festivals and events. In this regard, some of the local respondents commented that festivals, exhibitions, and seasonal offers and packages have high potential in attracting domestic and international tourists if they were well-developed in a way fulfilling the local community and visitors' needs.

The marketing and promotion of the destination's tourist activities work closely with stakeholders to support product development as well as to ensure the proper exploitation of the destination's resources. Some of the local respondents in the survey commented that the destination resources and infrastructure are significant influences of the satisfaction level and judgment on the destination attractiveness. Most of the attractions, including cultural and natural, have high potential to attract various segments of visitors if they are adequately marketed and promoted to the right market. As stated by one of the respondents, *"The Omani people are kind, but unfortunately, it is relatively unknown to American society."* Another response was that *"The Muscat Festival is not developed and promoted in a way to compete with other festivals in the region. It is getting worse every year. Therefore, more development and promotions are needed on the international platform."* As a result, only the countries that have a clear market position and appealing attractions will remain at the top of visitors minds when they arrange for their holidays. About 80% of the visitors' respondents assigned the highest possible rating to a future visit to the Sultanate. Therefore, amending and adopting proper marketing activities and promotional methods should convince visitors to revisit the destination and extend their stay in a destination.

A series of effective tourism promotional campaigns has helped raise the Sultanate's global profile through social networking platforms such as Facebook, Twitter, and YouTube. The impact of social media platforms has played a vital role in the promotion of many developing countries. In a country like Oman, where the sector has insufficient capacity and resources to meet market challenges, both the Internet and social media are currently powerful tools to facilitate communication, to create partnerships, and to promote the Sultanate. The findings showed that the government is not putting enough effort into promoting the sector abroad, which results in a low inflow of tourists compared to neighbouring countries. The local's comments in the survey indicated that the tourism sector is not taking full advantage of new technologies, mainly social media platforms, to enhance its competitiveness. Therefore, the promotion of Oman, locally and internationally, should be based on the recent strategic pillar: digital marketing. The digital marketing of a destination increasingly relies on social media to communicate with potential visitors. Although the MOT enables a variety of platforms on social media, there is still a strong dependency on traditional media broadcasting outlets. The results showed that the Internet and social media are not exploited fully to inform the world about the Sultanate's tourist attractions. According to TANFEED (2017, p. 73), it is essential to promote the image of the Sultanate through social media.

8.2.6.1 Destination Marketing Strategy

The Sultanate's marketing strategy was set to reflect the national tourism strategy (NTS) by focusing on the country's essential attributes and tourist motivators and fulfilling the stakeholders' objectives. These resulted in higher marketing expenditures as well as higher effectiveness in attracting more investors and tourists. Therefore, the government may have to review and adapt its marketing strategy and stop relying on just a few iconic attractions. For example, the NTS relies on previous regular events held in the country and it does not take into consideration that Dubai Expo 2020 and the World Cup 2022 in Qatar, both massive events that could entice tourists to Oman. It is necessary for destination managers and policymakers to identify the different needs of the different market segments. The findings revealed that the Sultanate's marketing strategy focuses more on wealthy international tourists while ignoring domestic and middle-income tourists. In addition, the local respondents emphasized in their comments that most of the sector investment and projects are directed at the wealthy tourists' segment. For example, the development of the accommodation sector is directed primarily towards international tourists' needs. One of the respondents argued that, "*Omani people could not afford the high prices for some tourism products; for instance, the cost of entering the Al-Hota cave is OMR 3.5 for an Omani; what if the person has more than one child? Also, the cost is doubled for non-Omanis, OMR 7."* According to MOT (2019) statement, travel by the local community within their destination is worth at least double the value of international visitors. Besides, domestic tourism makes up over 70% of tourism generated income.

Strategically, the tourism sector will develop organically as an authentic destination relying on its rich cultural and natural resources, according to most of the government officials. However, for the Sultanate to be well-promoted internationally, there must be a sufficient financial budget for the promotional activities. Although there has been a prioritization of the sector by the government, but, since its upgrade into a full-fledged ministry in 2004, the MOT still has one of the smallest budgets compared with other civil ministries in the country, according to the MOF (2019) budget report. Mazilu (2012b, p. 85) argues that destinations with limited financial resources for marketing activities are facing serious difficulties in producing an impact on the tourist market. A study conducted in 2012 revealed that the government spends only 5% of the national budget on marketing the tourism sector (Subramoniam et al., 2010). According to the Ministry's officials, the Ministry's budget was decreased due to the ongoing 2016 financial crisis from OMR 11m (US$ 28.6m) to OMR 3m (US$ 7.8m). This might be due to the Ministry's marketing strategy and the lack of effective management to invest the budget efficiently. According to the NTS objectives, the Sultanate has the potential to draw millions of tourists visiting the country every year. More than 10 million tourists are estimated to visit the Sultanate in 2040. However, the country may not be ready yet to attract and entertain all tourist segments. Traditionally, destinations have responded to a decline in visitor numbers by increasing their marketing expenditure (Buhalis, 2000; Ritchie & Crouch, 1993). This strategy seems to be ineffective now as more and more destinations are spending more on marketing, with limited results (Vengesayi, 2003). Buhalis (2000) argues that destinations suffer because they wrongly assumed that there is a direct relationship to a higher volume of tourists and higher revenues.

8.2.6.2 Destination Image and Branding

Destination branding is intended to have a positive effect on the destination image, and its results impact future destination positioning decisions (Morrison, 2013a). Many developing countries, including the Sultanate, find branding as a chance to distinguish and position themselves in the tourism market. Effective destination branding provides visitors with an assurance of quality experiences, reduces visitor seeking costs, and offers a way for destinations to establish a unique selling proposition. However, building a destination brand can be challenging for many destinations, in particular emerging ones.

A destination’s image carries both positive and negative qualities. The MOT is currently focusing its efforts with other stakeholders to promote positive images of Oman as a tourist destination brand. Primary attributes regarding the positive image of Oman are a variety of tourist attractions. At the same time, Oman’s political stability and high levels of safety and cleanliness are in stark contrast to other destinations in the Middle East and Asia. However, Oman’s image has some negatives perceptions. The image of Oman globally is not reflective of its rich culture and heritage and this limits the growth potential of the sector (TANFEED, 2017, p. 61). According to an analysis of the study, the country had done less to project itself on the international market by not creating and fostering its own familiar, distinct, and unique brand. The findings also indicated that some reasons should be put forward as to why the Sultanate needs a strong brand. These reasons can be the globalization of the economy, challenges related to Oman’s joining the tourism market at a later stage than others, growing competition primarily from neighbours in the region, and the need for local companies and products to be competitive. The final deciding reason is the lack of a coordinated strategy for promoting Oman.

8.2.7 Tourist Products and Services

The nature of a destination development is shaped by the demand for tourism at a destination. The destination promotes and diversifies its tourist products and services to meet the demands of visitors as well as the local community and increases its regional share in the tourism market. The tourist demand side is led and influenced by tourist attractions, the price of tourism products, accessibility of destinations, governing laws, political stability, the seasons of the year, and the climate factor. However, the results showed that many natural and historical sites in Oman do not have adequate public services or entertainment activities that could complete the visitor's experience. The Sultanate's tourist infrastructure and facilities are still insufficient to support the growth of the sector in many remote areas. One of the respondents stated that, *"There is a lack of essential tourist services in some natural and historical sites, such as public toilets, restaurants, and hotels."* Notably, a destination will not be able to attract more visitors and grow if visitors are unaware of the destination and its various tourist attractions. According to Bramwell and Sharman (1999), the success of a tourist destination in the international market depends on the general level of quality of tourist services and products provided.

Visitors to a destination are more likely to choose destinations based on the variety and quality of the destination supply. The lack of diversity in tourist attractions shortens visitors' stay at the destination. Also, in order to improve its global market position, a destination should be innovative and continuously seek to attract tourists whose money can provide growth and development for the sector. The analysis of the study indicated that there are several potentials areas that make the growth of tourism services in the Sultanate promising. This requires focusing more on tourist attractions (natural, cultural, and industrial). According to Fyall (2008), tourist attractions are the catalytic focus for the development of tourism infrastructure and services. For example, tourism in Europe is based mainly on the existence of world-class "3Ss: sea, sun, and sand", all of which Oman has plenty. Another potential focus on visitors from the MENA countries whose numbers have been increasing over the years (see *Table 4.9*). Their similar customs and traditions with Oman, and because of the common language, they have an easier time navigating airports, hotels, and shopping centres. However, Oman's tourism market faces intense competition from international destinations such as Malaysia, Georgia, and Azerbaijan, which target affluent Middle Eastern travellers from the GCC region, including Omanis. Such competition might affect its target strategy (NTS) to attract 11.7m international tourists by 2040. Therefore, the more a destination can meet and perceive the needs of its visitors, the more it is perceived to be attractive by the visitors, and the more likely the destination is to be chosen.

8.2.7.1 Destination Tourism Resources: Natural and Human-Made

The effects of management and marketing on tourism development vary from one destination to another due to a broad set of natural resources of the tourism destination (Pao, 2004). Although economically modest compared to neighbouring countries, the Sultanate has tremendous potential for tourism development because of its unique natural and cultural-heritage resources that need to be appropriately managed to retain them as tourism assets. By making efforts to capitalize on the country's resources, the Sultanate is aiming at enhancing its tourism development (MOT, 2005). However, the analysis of the study showed that despite the abundance of these resources (in particular natural) within the Sultanate, and the pragmatic effort by the government to develop tourism, the desired goal to diversify tourism products and support the country's economic development had not yet been realized due to the limited exploitation of these resources. The research showed that many, if not almost all, natural attractions are either underexploited or do not meet international standards. This, as mentioned previously according to the informants, was due to the weakness of private sector involvement, the lack of financial resources, the complexities of government procedures and regulations, the lack of proper tourism planning, local community objections to some tourism projects, and poor management of attraction sites. In addition, these attractions can limit a destination's capability to attract and satisfy potential visitors, and hence, affect its development process, competitiveness, and sustainability. There was a general agreement among the informants on the necessity for developing and properly exploiting the natural resources, which could give the Sultanate an advantage over its immediate competitors in the region. Therefore, the renovation of natural resources and attractions, or the development of innovative new products, such as local festivals and themed experiences (e.g., New Year's Eve and Salalah Khareef festival) also enables destinations to manage their product life-cycle effectively. In this regard, the role of the MOT in collaboration with both tourism business developers and the local community has become essential to ensure conservation and rational management of natural resources that make up the destination. This involves the careful and effective management of those resources, specifically those that are vulnerable to damage by excess tourism (Ritchie & Crouch, 2010, p. 1063). However, the ability of the private sector to develop such places is limited by government regulations, and as well, the government limits the types of investments and projects available.

8.2.7.2 Development of Destination (Tourist) Infrastructure

Destination infrastructure is possibly the most complicated aspect of the sector development process, and it is the subject of extensive government investments for the consistent growth of the sector. Destinations that fail to maintain the required infrastructure standards or build an unsuitable infrastructure encounter significant difficulties and risks (Bunghez, 2016, p. 2). In Oman, since launching Vision 2020, the government has invested billions of Omani Rial in new developments and the upgrading of ageing infrastructure. For example, more than half of total spending in the Eighth Five-Year Plan (2011-2015) was allocated to the construction of airports and roads, and another 26% was assigned to seaports, public services, and housing. However, the analyse in the study showed that inadequate infrastructure is the second-largest challenge pertaining to tourism development. This challenge is so acute that the Sultanate may not have been able to develop definite tourist products. The main cities in Oman, such as Salalah, Nizwa, and Sohar, generally lack leisurely attractions, which are imperative for attracting international and domestic tourists. The lack of entrainment activities, as well as insufficient public services, are the main reasons to consider those cities unappealing to visitors. However, there are increased attempts and efforts from the government to transform those cities into attractive destinations through various development projects and targeted investments. Moreover, the findings showed that many of Oman’s unique natural and cultural attractions are either not supported by adequate road access, or other infrastructures, or do not have facilities such as suitable accommodation and catering facilities. The transportation infrastructure within Oman needs improvement. The Sultanate’s flagship carrier, Oman Air, does not hold the same reputation for quality as its neighbouring competitors such as Emirates, Qatar Air, and Etihad. Budget airlines are also lacking and are necessary for such a large and spread-out country. Improved road infrastructure is also a necessity as there are considerable stretches of desert road without service stations, some of which are even unpaved (TBY, 2017, p. 105). Moreover, the absence of development in some areas in the Sultanate has caused a clash between the stakeholders and the sector’s development process. For example, some major tourism projects suffer from the absence of infrastructure and essential services in the project area; hence, there is a need for an entity, or a coordinating process, that is responsible for overseeing agreements between the government and business investors and developers on infrastruture development.

The ability of any country, in particular developing ones, to attract investments might be influenced by a complex number of policies and procedures. Recognizing the importance of the sector, the Omani government has taken several positive actions towards improving the investment climate. The government has presented an initiative whereby the investor submits any partnership proposal associated with the provision of necessary infrastructure to the MOT. The Ministry will review the submitted proposal and evaluate the proposition to determine whether to grant any incentives in exchange for the private sector to develop the infrastructure. Possible incentives could include usufruct rights extension, rental exemptions, and tax exemptions. If no agreement is reached, that would cover the costs of the proposed infrastructure, the matter shall be referred to the infrastructure committee of the Supreme Council for Planning for further consideration (TANFEED, 2017, p. 72).

Furthermore, the government may not be able to develop all regions in the Sultanate at the same time; however, the NTS includes massive tourism projects (clusters) to be developed at different times and phases, which are the tourist spots of Musandam, Al-Hajar Mountains, the Frankincense Trail in Salalah, the city of Muscat and the surrounding deserts. The idea of tourist clusters provides a significant saving in the costs of extending the infrastructure, where services are grouped in a specific location, thus facilitating the provision of essential services to the tourism community. However, the dispersion of the tourism projects in all the regions needs to be re-evaluated in light of the much-needed integration of tourism products and to achieve a minimum critical mass of development (THR/MOT, 2016). Improvement of the enabling service infrastructure and adopting measures in the sector would create a conducive and investment-appealing environment, thereby increasing foreign and the PPPs for tourism development. The findings revealed that despite the MOT providing the government-owned tourism lands to the private sector in the usufruct contract to encourage the private sector to invest in tourism, the MOT still determines the appropriate projects to ensure both balanced tourism development and results. In this regard, the government and the local community are striving to work with private segment partners without compromising on the local nature and cultural heritage.

8.2.7.3 Development of Tourist Products and Services

In the tourism industry, destinations are being required to develop and maximize their products and services in line with market needs and opportunities and the physical scale of development. Such product development would reduce direct competition between destinations that are directed to similar markets. Significantly, the development of tourist products depends mainly upon a positive environment for investment, the collaboration of government and tourism businesses, and those who indirectly contribute to the service delivered to tourists at the destination, such as the local community. In the Sultanate, given that the tourism strategy appears to be at a loss on how to remedy the situation, it clearly shows a lack of strategic planning in this area. Despite the fact that the country has a diverse range of tourist attractions and facilities to maintain international levels of quality and service, the findings revealed a lack-lustre feeling for many of Oman’s domestic offerings and a general lack of renewal that needs to be somehow addressed. What is currently being delivered to visitors and the local community is an unpretentious product that reflects the lack of effective tourism management. For example, cultural-heritage attractions should be adequately maintained to avoid deterioration, which in turn would guarantee an authentic experience by visitors. In this regard, the development of tourist products and services should be an essential element of the destination management. The government should provide adequate funds to build and improve the quality of services provided at tourist sites. These should come through intensive investments to not only upgrade existing infrastructural facilities and superstructure services but add new ones as well.

8.2.7.4 Pricing

The pricing strategy of tourist products is a crucial element to signal the type of destination and the type of visitors it wants to attract where high-income visitors and low-income visitors may get the opportunity to travel. Oman, as the findings revealed, is considered an expensive destination, and in that respect domestic and international visitors have become increasingly price-sensitive, mainly with regard to accommodation services. A visitor argued that, *"As a family destination, Oman is very expensive in terms of the accommodation sector and other tourist services compared with the UAE."* The results of the study showed that the influence of natural resources, political stability in the country, and infrastructure improvement is limited due to price competitiveness with neighbouring countries. The countries are forced to compete with one another by lowering their prices in specific sectors such as accommodation and transportation to entice frequent visitors. For example, the lack of budget hotels has caused high prices in the hotel sector. In the domain of air transport, flights into and within the country were considered by most of the respondents to be expensive when compared with other destinations offering a similar range of tourism products. The analysis of the study indicated that there is an immense opportunity to tap into transit passengers (less than 40% are Muscat-bound) to spend a few nights in Oman. The problem is that there is not enough budget or three-star hotels in the country. The current hotels also charge more during summer and off-peak season when they have low occupancy (TravelWeekly, 2014). According to statistic.com (https://www.statista.com/statistics/674662/oman-adr-of-hotels/), in 2016, the average daily rate of hotels in Oman was US$ 146, a decrease from the previous years, the US$ 200-250 range, with an occupancy rate of around 50%. A study run by travel website hotels.com in 2013 found Oman to be the second most expensive country, after Monaco, for average hotel prices, at US$297 a night (OBG, 2015). Matthew Wright, the Associate Director for Strategic Consultancy at Cluttons Muscat Office, also commented on the pricing in Oman, stating that, *"The number of new hotel rooms is set to double over the next five years, but will there be the number of tourists to fill them? Really, I do not know the answer to that question; it is a chicken and egg situation."* (TheNational, 2013).

Buhalis (2000) asserts that destination competitiveness may be improved through product development, distribution channels, promotion and communication, and above all, through policies of pricing (Angeloni, 2013, p. 126). Explaining the reason for high prices and the role of the MOT, the Undersecretary of the MOT pointed out that the hotel tariffs are determined by supply and demand, as is the norm in the rest of the world (MuscatDaily, 2015). She added that the Ministry is trying to leave pricing in the hands of the accommodation businesses, however, visitors must perceive prices as a fair and reasonable value for money because dissatisfaction damages the competitiveness of the destination. On the other hand, and according to MOT (2002), Oman Law of Tourism (33/2003: Article 2) that states, *"…the Ministry shall, in particular, control the prices of commodities and services provided in hotel and tourist establishments."* Based on the law, the MOT should be doing something to control hotel tariffs. Quality perceptions and customer satisfaction increase positive word-of-mouth communication and visiting intentions and also limit price sensitivity (González, Comesaña, & Brea, 2007). Unfortunately, in Oman, there remains a gap between the service quality and prices provided by hundreds of hotels.

8.2.8 Impacts of Tourism Development

The benefits of tourism development are often accompanied by negative impacts, which degrade the social and environmental context in which tourist interactions occur. Lawton and Weaver (2010) emphasize that tourism development needs to be carefully controlled to ensure that its benefits are maximized and appropriately distributed between destination stakeholders, and its negative impacts are minimized. However, various tourism impacts are usually considered as natural outcomes of tourism development. According to Swarbrooke (1999), the actual impacts will vary between different types of destinations, depending upon destination planning and development, the types of tourism and tourists, the level of development of the tourism industry, its relations with externally based tourism organizations, public sector policy, and the fragility of the environment, economy and culture. Remarkably, the negative impacts of tourism development are increasing in developing countries more so than in developed ones (Keogh, 1990; Lawton & Weaver, 2010; Mason, 2008; Pearce et al., 1996; Yoon, 2002).

Leisure tourism, for instance, challenges the social values and cultural mores of the Sultanate. Visitors from different countries and backgrounds bring elements of their own culture, which in turn may impact on the society's culture and attitudes. The findings of the study showed that the impacts of the tourism sector, whether economic, social, or environmental, vary according to the tourism characteristics and patterns available for each destination. In many developing countries, including the Sultanate, the increase in tourism might have resulted in positive impacts on the society, environment, and economy, in terms of the availability of employment, movement of the local market, an increase in the currency exchange rates, development of public services, and economic growth from the rise in the GDP. The environment also benefits through increased publicity and awareness, financing and revenue for environmental projects and protection, as well as better environmental management. Notably, the social and environmental impacts are not yet serious, but these are emerging and have the potential to become dangerous if ignored. A respondent from the local community commented that, *"Oman's tourism is uncontrolled; the government is not protecting locals. For example, cruise ship tourists sometimes they misbehave in some tourist sites such as Muttrah Souq and Grand Mosque."* In this regard, the MOT, in collaboration with other authorities, continues to review socio-cultural, economic, and environmental considerations in the tourism development process. This is to manifest the government's policy, from the beginning, to moderately develop the sector by focusing on the high-quality tourists and in low numbers to minimize the environmental impact.

Not all destinations are immune to the negative impacts of tourism, and the degree of impacts vary from destination to destination. Although tourism has bought huge benefits, it also generates negative impacts on the local community as tourism increases prices of land and housing and increases locals' cost of living. Where unplanned and uncontrolled tourism development can cause changes in the activities linkages of tourism in such a deterioration of the environment, changes in the social system that tourist growth can be compromised. In this regard, Hazbun (1997) asserts that although the positive aspects of tourism in the Middle East countries are recognized, negative tourism impacts were not highly considered, and this reflects and this reflects a lack of awareness regarding future threats to locals and environments as well as a lack of forethought implementing measures and indicators to monitor the condition of resources and sites that have been exposed to tourism development.

The tourism sector is increasingly seeing environmental and social issues as a source of both threats and opportunities. DMOs can effectively manage the negative impacts of tourism if the impacts have been previously identified, measured, and evaluated. The adverse effects of tourism can be minimized when local businesses and communities both have shared interests in maintaining the social heritage and natural wealth of a tourist destination. The findings indicated that although tourism may not be fully responsible for the harmful activities, the Omani society believe that tourism could encourage alcohol consumption and the promotion of other western values that could conflict with those of the local community. It was also shown that tourism caused some traffic problems, more road accidents, caused damage to nature and brought diseases. Thus, to mitigate the negative impact of tourism, the Omani government is required to drive development, but still place higher limits, rules, and controls on the sector.

Although tourism is closely linked to the environment in determining the viability and attractiveness of a tourist destination, many governments, for the economic benefits of tourism in developing countries, have placed tourism development and the generation of profits before environmental concerns. The focus in those countries had been on how to look for ways to maintain and keep the tourist economies running to the detriment of their ecosystems. Fossati and Panella (2000) argue that the more the supply of tourist services is concentrated in an economy, the higher the risk of damages to the environmental equilibrium. Mustafa (2010) assures that the significant increase seen in the number of tourists' arrivals and revenues is with no doubt, the primary target for any tourism development. In Oman, where the natural environment is considered to be the Sultanate's biggest tourism asset, some of the locals commented in the survey that although there are many positive economic impacts from the growth of the tourism sector, the local community is concerned about the negative impacts on the social life and natural environments. Also, the analysis of the study showed that the country is faced with challenges associated with damage to coastlines due to the construction of Integrated Tourism Complexes (ITC), damage to mountainous areas due to intense quarrying from the construction and mining industry, pollution of fragile desert environments, high seasonal traffic congestion in some areas (such as Dhofar from June to September), as well as environmental threats associated with limited water resources. This could be true with regard to tourism based on the natural environment as well as historical-cultural heritage. In this regard, Sinclair (1998) emphasizes that many of the problems associated with tourism and the use of environmental resources in developing countries stem from market failure. Kimbu (2010) urges that uncontrolled tourism development is seen as posing a serious threat toward, and being responsible for, the destruction and exhaustion of the environment and its resources, all to the detriment of the local communities and future generations, as well as potential tourists. In this aspect, the effective management of these resources is critically important to minimize negative impacts and maximize positive benefits towards the sustainability of the industry.

8.2.9 The State of the Tourism Sector

In Oman, the tourism sector is comparatively new and a relatively small part of the total economy. However, the sector, if well developed and managed, has immense potential economic benefits, which further leads to an improvement in the economic development of the country. The significant and long-term association between the sector and the growth of the country's economy has encouraged the government to pay attention to the sector.

8.2.9.1 Contribution of Tourism Development

In many developing countries, tourism contributes up to 25% of the national GDP (GIZ, 2014). In Oman, the sector has shown a positive impact on economic growth, which represents 2.6% of the Sultanate’s economy in the trend of heavy reliance and dependence of oil shifting to non-oil sectors (NCSI, 2020). It also does not only impact economic growth but, in the long run, it leads to an improvement in economic development in a variety of ways such as generating employment opportunities and reducing the dependence on the export of oil and gas. Bunghez (2016, p. 8) concludes the amount of tourism contribution to a destination's economy is influenced by the degree of infrastructure development, the management abilities of local authorities and private investors, the economic development level of the destination’s country, and destination marketing abilities. The research findings showed that the tourism development process in Oman is often challenged with a lack of willingness to cooperate among stakeholders; the inadequate provision of tourist products and services; lack of financial resources for marketing and promotion; inconsistent imagery presented in the tourism market; and rivalry between destinations in the region. Besides, the process may suffer from a gap in the sector delivery mechanisms due to influences affecting the country's competitiveness, lack of the economic contribution of tourism, and lack of economic policy.

8.2.9.2 Challenges Facing the Sector Development Process and Overcome

Many developing countries, including Oman, have experienced the emergence of problems and failures that pose challenges to the development process of the tourism industry. According to Jenkins (2006), the continuing demand and growth in tourism will provide many opportunities and challenges to destinations. Such challenges may lead the government and tourism businesses to make risky, uncertain decisions, especially considering the government’s central control. Some of these challenges may also create potential barriers and continue in the future unless destination authorities (DMOs) take corrective measures to deal with them. Therefore, it is vital to explore and assess these significant challenges for the development of the sector.

In contrast, these challenges, if addressed correctly, can be turned into golden opportunities that could speed up the development of the sector.

Based on the respondents from tourism stakeholders (the government officials and tourism business managers) in the Sultanate, and the local community and visitors' surveys and their comments, the analysis of the study revealed the most critical problems and failures that pose challenges to the development of the sector summarized as follows:

- Centralization of decision making in multi-governmental authorities often cause a lack of implementation of the policies and create a barrier for collaboration with private businesses.
- Lack of adequate and effective marketing and promotional activities due to the weakness of marketing strategies for tourist products.
- Lack of consultation, cooperation, and coordination between the government and the private sector in terms of making decisions, setting regulations, and imposing procedures.
- Lack of price competitiveness in terms of accommodation and the airline sector.
- Lack of professional and open-minded workforce employed with the government and tourism businesses.
- Lack of the implementation of laws and regulations, and the existence of exceptions from the ministries causing overlapping among government bodies.
- Limited business involvement in the promotion and product development.
- Limited incentive and funding programs to encourage business investments, the deficit in the state budget causes a lack of funding for new venture creation and upgrades to tourism SMEs.
- Limited participation of the local community has caused conflicts with the government and business investors in tourism projects.
- Limited product diversification and lack of tourist infrastructure and services in many tourist sites around the Sultanate.
- Limited understanding among decision-makers and policymakers in the strategy (NTS).
- Overlapping regulations and distribution of tourism-related responsibilities across multiple government levels complicate and slows the administrative decision-making processes and restrains progress on key growth initiatives.
- The bureaucracy associated with government intervention in the sector’s management resulted in a lack of credibility and poor coordination and communication between government departments.
- The impact of the global financial crisis and the slump of oil prices on the development of the sector and other public investments and funds (economic crisis).

Managing the development of the industry is full of challenges. These challenges/obstacles might cause the slow pace of the industry development process at any destination. Although it might seem controversial given the challenges represented in the analysis, Oman has a high potential for development. Once these obstacles are addressed, a significant fast process of sector development can be as planned. In this regard, appropriate tourism development requires several essential actions that should be taken to address and overcome those challenges to improve and develop the industry. Also, the destination managers and policymakers have to be proactive in creating and implementing development strategies that can successfully deal with specific challenges to achieve a more balanced approach to tourism.

Through the analysis of the challenges facing the sector development, there is a broad scope of actions generated from the primary data for the development of the sector in Oman.

- Enhancing the collaboration among the sector stakeholders, such as extensive public-private partnerships, with a view to establishing tourism policies, strategies, and regulations relative to tourism development.
- Enhancing cooperation and benefiting from the opportunities available in the Gulf region through building alliances between Oman and other destinations such as the UAE, as they are in close geographical proximity and have distinct cultures and landscapes which complement one another.
- Improving and developing high-quality tourist services and products to compete effectively with other destinations, especially in rural areas where few other possibilities exist.
- Obtaining more access to funding resources for tourism projects, including the government and private businesses.
- Opening-up and benefiting from other countries' experiences in the sector development process by providing training and education programs on different aspects of tourism.
- Recruiting professional, highly trained, and qualified workforce in the sector activities who could influence the process of implementing sector strategies and activities.
- Reviewing and amending the strategies and policies of the sector, to keep pace with the changes and requirements of the world tourism market.
- Reviewing and improving marketing strategy and promotional activities through focusing marketing initiatives on the identified niche markets, i.e., budget tourism, culture and leisure events, nature-based tourism, cultural-heritage tourism.

8.3 KEY CONTRIBUTIONS, RECOMMENDATIONS & LIMITATIONS

This is the final part of the study, where a number of conclusions have been reached from the researcher's interpretations and discussions in the proceeding sections, along with theoretical and practical contributions of this thesis. The research limitations are also considered, along with identifying recommendations for future research.

8.3.1 Conclusion

Research on the understanding of the development process of tourism in developing countries is still in its infancy. Conducting in-depth research on tourism development in a developing country, the Sultanate of Oman, was an important step to gain a better understanding of the importance of tourism for the country's economic development. The study has provided answers to the research questions to fulfil the objectives through examining opportunities and challenges to tourism development in terms of destination development strategic plans, the role of DMO in collaborative and partnership actions with key stakeholders, improving and developing destination policy, the quality and availability of destination supply as well as service infrastructure, and the competences of the workforce in the tourism industry. Additionally, developing a heuristic tourism framework for tourism development to deal with development and management issues in a developing country (emerging destination).

Despite the governments' efforts and direct involvement in collaboration with other stakeholders in the sector, there is still a lot that needs to be done in terms of the sector reaching its full potential. The study revealed that there is a general lack of understanding of the tourism development process. This is due to the lack of professional and governmental expertise, where decisions made without understanding tourism have the potential to create economic impacts on tourism operations, which government authorities may not foresee. Also, a perceived lack of understanding exists regarding the important role the private sector can play in the tourism development process. Significantly, the implications of the study revealed that there has been a slow or modest pace in the development process of the sector due to major challenges concerning management, marketing and promotion, legislation, resources and infrastructures, competition, and international positioning in the global tourism market. As a result, the contribution of tourism to the GDP has not exceeded 2.5% as well as low enrolment of the Omani workforce in the sector.

On the other hand, this research has highlighted significant implications for tourism development towards a more successful and sustainable path for development. The study affirmed that the main elements of tourism success would depend primarily on the need for effective destination management (DMO), active marketing strategy and promotion activities, the government's involvement and policies, collaboration and partnerships between of the stakeholders, and the availability and uniqueness of destination resources and activities. With the right degree of investments, promotion and marketing, all stakeholders especially the government, stand to gain from the opportunities in destination development, which can develop niche segments such as nature/eco-tourism, which is increasingly gaining popularity among local and international tourists. In this regard, the Omani government needs to assess and refine the sector development strategies to determine the best approach for the future, where effective management and governance support the tourism development process, strengthen its contributions to the country's economy, increase local and foreign investments, develop skills of the workforce as well as proper utilization of tourism resources. Also, the study assured that effective cooperation and robust partnerships between stakeholders, such as the government and private businesses, should lead to improved sustainable and high-quality destination services, marketing and promotion nationally and globally, and consequently, increased competitiveness of the country in the global tourism market.

In conclusion, the economic and development issues that are derived from the study could be used for correcting the tourism development process. The findings and discussions of the study regarding the strengths and challenges to tourism development have been raised with special reference to the Sultanate of Oman; such findings may be valid for other developing countries with a similar trend of tourism development approach and experienced similar difficulties.

8.3.2 Contribution of the Study

This study may be considered the first comprehensive one of its kind that offers an innovative contribution to the literature on tourism (see *Figure 2.1*), where tourism development is being considered. Using Meta-Analysis of the literature, a critical review of relevant literature related to tourism development revealed several gaps concerning tourism development in the context of destination management and marketing. These concepts are distinct domains in tourism literature and form the conceptual background for this research. At the same time, the literature on these aspects is not available enough, especially with regard to the development issues in developing countries as it is very limited. This study presents a holistic picture of tourism development aspects and may provide a different perspective and insight of tourism research to understand the phenomena much better. As a result, the study has expanded the aspects of tourism studies into more diverse and distinguished dimensions by shedding light on the efficient management practices, marketing and promotion activities, stakeholders' involvements, utilization of the destination's resources, and destination competitiveness.

Based on the findings, theoretical and practical implications can be derived. Adopting the Sultanate of Oman as a developing country case study, this study presents significant contributions to academic and practical implications manifested in providing the basis for better tourism development in these countries in the context of management practices and marketing activities.

8.3.2.1 Academic (Theoretical) Contribution

Many scientific publications have discussed tourism development issues in the world, and many scholars and researchers have attempted to explore the contribution of the tourism industry with regard to the economic development of developing countries. The Middle East countries and, in particular, the Arabian Gulf (GCC Countries) have attracted interest from Arab and Non-Arab researchers to study the industry (e.g., (Abdul-Ghani, 2006; Daher, 2006; Henderson, 2015; Morakabati, 2011; Mustafa, 2010; Ritter, 1986)). However, there is almost no attention paid to the study of Oman as an emerging destination in the Arabian Gulf, where only a few studies have been conducted locally by the MOT, academics, and researchers at the universities and colleges in Oman. There are previous studies that have studied the sector from different aspects such as (Subramoniam et al., 2010): SWOT Analysis on Oman Tourism: A Case Study. The study was conducted to identify strengths, weaknesses, opportunities, and threats (SWOT) using brainstorming of tourism experts, tour operators, and tourism officials, to develop a SWOT matrix and evolve strategies for tourism development. Al-Azri and Morrison (2006): Measurement of Oman's Destination Image in the US conducted a study that analyses and measures Oman's destination image in the US. Henderson (2015) was concerned with destination development processes and underlying dynamics by presenting a comparative case study of Oman and Qatar, which were actively pursuing growth. Moreover, the only existing fragments of published literature about tourism in Oman can be found in a few existing specialized articles, theses, guidebooks, reports (e.g., NCSI, UNWTO, WTTC) and on the web pages of some specialized niche tour operators, as well as on some working documents of the Ministry of Tourism.

Significantly, this study provides an in-depth analysis of the importance of destination management and marketing in the sector's development process in a developing country. Where future researchers may also use this piece of research as a reference source when conducting research dealing with tourism development in developing countries in general, and the Arabian Gulf in particular. Theoretically, this study makes a unique contribution to academic in the following key areas:

- Adopting a new and broader perspective through exploring relationships among the various aspects and relations (interrelationship and interdependence) of tourism with the economic development process.
- Demonstrating the key stakeholders' involvement in the tourism development process and interpreting their different views and perceptions of tourism.
- Enhancing and promoting the importance of effective management and its influences in the tourism development process.
- Outlining the various relations between components of the process that occur as a destination develops.
- Presenting a public-private partnerships experience; and stakeholders' satisfaction and experience (the local community and visitors).

Methodologically, the exploratory and descriptive nature and context of the research demanded that the researcher settles for a pragmatic research philosophy. Significantly, the methods were chosen through the review of the meta-analysis methodology outcomes on the application of the mixed-method approach, which indicates that most of the previous works rarely used this method for their research. Purposive and snowballing sampling techniques were applied to recruit respondents from each sampling unit. All obtained data in the questionnaires was then analysed by using SPSS. The analysis process was segmented into two stages. Descriptive Analysis, the first stage, was used to examine the local community's and visitors' demographic characteristics and the overall satisfaction of the development of the sector. The second stage, Factor Analysis, was used to identify the factors that determine the local community's and visitors' satisfaction through employing Exploratory Factor Analysis (EFA) using Principal Component Analysis (PCA) with Varimax Rotation. Thematic analysis was used to analyze obtained data from the semi-structured interviews.

8.3.2.2 Contribution to Practice

The importance of this study comes from the fact that the case of Oman gives insights into the understanding of the tourism development process in developing countries that have not been researched before in tourism development literature. The tourism sector and its contribution to economic development have been little explored to date, if it exists at all. As a result, this research contributes to the Omani tourism sector through:

- Assisting the government in enhancing and evaluating the tourism development process to support the country's economic development.

- Enhancing government ambitions and concerns for economic diversification and development of the country from the tourism perspective.
- Highlighting the outcomes of cooperation between the government and the private sector in the tourism sector.
- Providing practical information for the concerned government officials and business developers to address the issues and challenges that may confront any future development strategies.
- Providing insight into how the Sultanate has implemented its development strategies (Vision 2020 and Vision 2040).
- Shedding light on the contribution of tourism and its influences to increase the country's economy.
- Shedding light on the MOT's experience of developing the tourism sector and the implementation of national tourism strategy (NTS).
- Providing a coherent history of the development of Oman's tourism sector from the 1970s until the present day.

8.3.2.3 Conceptual Framework (Model):

The value of this research is that it presents a comprehensive conceptual framework (see *Figure 2.8*) that takes tourism research a step forward. This framework takes into consideration and emphasizes the importance of the core aspects (components and themes) and relationships in the framework's construction in terms of destination management practices, destination resources, destination marketing and promotional activities, tourism contributions and influences, competitiveness aspects, and stakeholders' involvement and economic development. The framework also provides a guideline allowing destination managers and policymakers in developing and managing the industry more efficiently and productively as well as dealing with the challenges affecting the development process. The model also advances the investigation of the contribution of tourism to the destination's economic development as well as the reasons for the slow pace of tourism development which are in the early stages of tourism development. More so, this framework fosters proactive prevention. Where, if it appropriately implemented, would provide a suitable methodology to explore and resolve current and prospective problems relating to tourism development in developing countries.

Moreover, the model provides evidence on the variety of arrangements, destinations implementation to create a contribution and, at the same time, create the boundaries within which stakeholders are permitted to act. The application of the framework may help to reveal the dynamic interrelationships among the components that support and enhance the development process to economic development.

In future to achieve its possible theoretical generalization, the framework can be updated to match the evolving needs of tourism in making it possible to engage with, and continuously support, the tourism development process not only in Oman but also in other countries.

8.3.2.3.1 Applying the Conceptual Framework to the Sultanate’s Tourism Sector

As an analytical tool, the proposed conceptual framework was applied to assess the state of tourism development in Oman (see *Figure 8.1*). The framework gives an excellent opportunity to explore the challenges facing Oman’s tourism development as well as provide appropriate solutions for Oman and for countries in similar situations, which are in the early stages of tourism development. As can be demonstrated in the stages of Figure 8.1, the connected and integrated themes and components in the framework are necessary to assess the tourism development at any destination, including Oman.

In the first stage, destination management involves government intervention with the MOT in collaboration with other government authorities who are responsible for most tourism decision-making process related activities as well as hold more power and administrative status. Significantly, the MOT is involved in all stages to contribute to the success of the development process. Stage Two demonstrates the stakeholders' economy and involvement activities. This stage identifies the relations between the government (the MOT), the visitors (international inbound) and the local community (Omani and Non-Omani ex-pats) as well as business developers (local and foreigner investors) in terms of the destination infrastructure and services and their involved aspects. Mindful of the fact that the stakeholders’ local community and visitors are the central components of tourism development in which they are called upon to play important roles in the process. Together stakeholders’ involvement provided a rich picture of the issues relating to tourism development. The third stage shows the contribution of tourism activities in the Sultanate’s economy. It enhances its economic development in terms of increasing the GDP, providing employment opportunities, and improving the country’s infrastructure and services. Stage Four presents the influence of tourism development on the country’s economic development by demonstrating the outcomes derived in Stage 3. Interestingly, this last stage of the framework is connected, showing convergence in the outcomes to be attained, which are outlined in Chapters Five, Six and Seven.

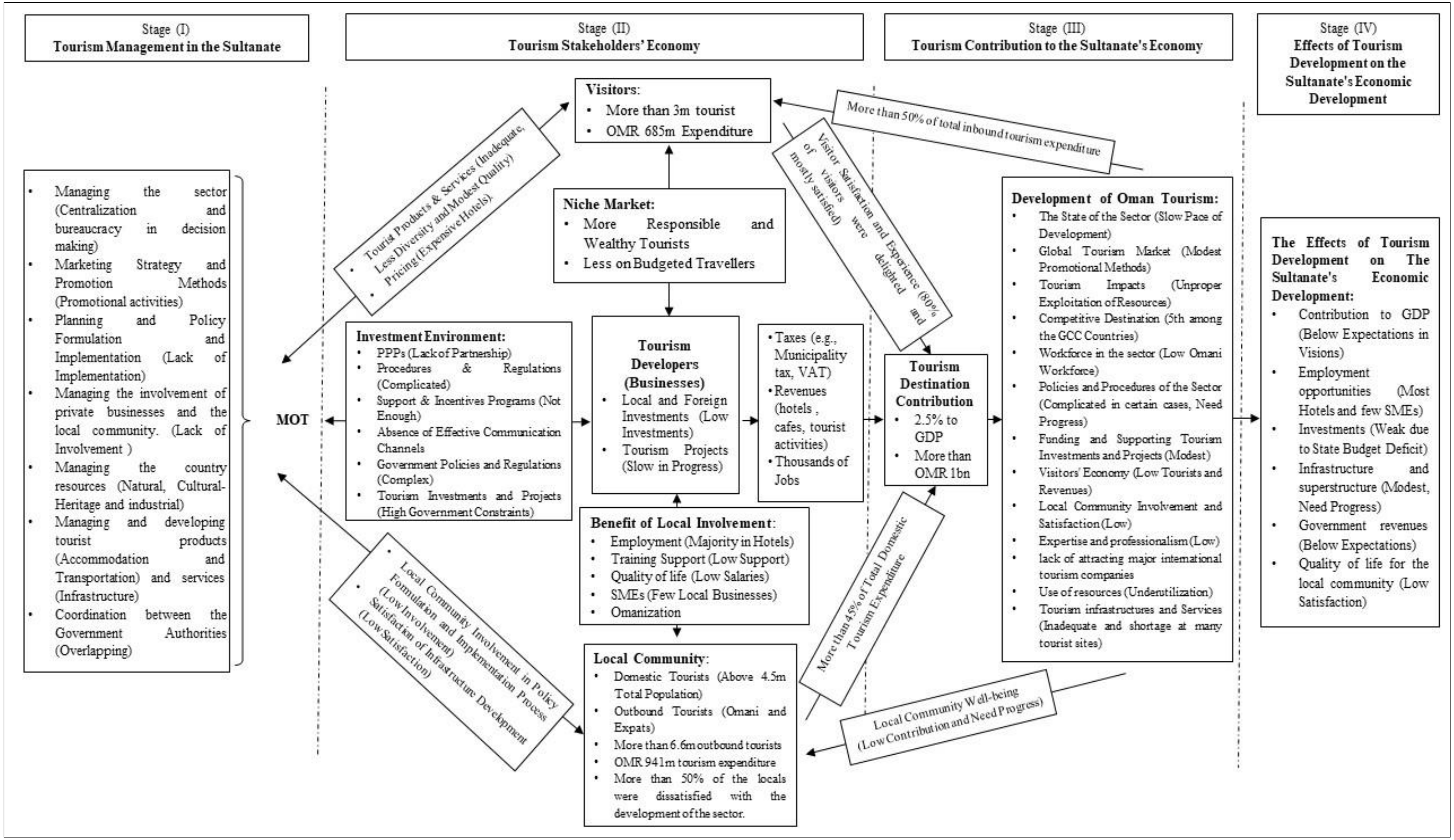

Figure 8.1 Flow of the Effects of Development and Management Process of Tourism Sector on the Sultanate's Economic Development

Source. Author

Note: Previously referred to Figure 2.8 in Chapter 2.

8.3.3 Recommendations of the Study

Following the objectives set out in Section 1.4 as well as based on empirical results mentioned earlier, the researcher addresses a number of academic and practical recommendations underpinning the development and management of the tourism industry and improving its contribution to economic development, which could be applied not only by the government and by tourism businesses in the Sultanate, but by other developing countries as well. The recommendations regarding the support of the tourism sector in the Sultanate are as follows:

- Restructuring some government entities such as the Ministry of Culture and Heritage and the Ministry of Tourism to be grouped under one ministry to encourage the recovery of the centrality of tourism in national policies. (Surprisingly, a merge happened in August 2020; both ministries are merged into the Ministry of Heritage and Tourism.)
- Focusing on creating an enabling environment that incorporates the private sector building and maintaining PPPs in their policies and strategies.
- Applying international standards and successful experience destinations for developing and classifying tourism products and services.
- Building-up a robust collaboration between the government, private businesses, and the local community to respond to the changing demands in the global tourism market and to deliver high-quality tourism.
- Developing a tourism-facilitating infrastructure and public supporting services around mega tourism projects and in remote tourist sites.
- Developing effective information systems among the government authorities, the private sector that allows for understanding the community and visitors' demands, and for active tourist product development.
- Employing an effective destination management structure to guide the sector development process in the long-term.
- Encouraging investors (locals and foreigners) by granting more attractive incentives and programs such as long-term contracts and facilitating the licensing regulations and procedures.
- Focusing on niche markets such as family tourism and ecotourism through employing more effective marketing activities and promotional methods (e.g., digital marketing).
- Improving the capacity of the sector workforce through linking tourism training and skills development opportunities to industry sector needs.
- Lifting-up the sector's standard mechanisms to support best practices in the public services and quality control and the protection and presentation of natural resources and other environmental and cultural values.

- Promoting and increasing awareness of the tourism sector and its benefits through establishing on-going consistent and reliable research programs at the national and regional levels of the destination.
- Reviewing and improving destination governance (e.g., investment regulatory framework) to streamline investment and business operations to support and identify the appropriate type of tourism development.
- Reviewing and updating strategic marketing plans to foster the marketing of the destination locally and internationally through the use of various media.

8.3.4 Limitations of the Study

As is the case with most academic research, it is essential to discuss the limitations of this research before making suggestions for future research. The main limitation is the fact that the findings of this study are based upon testing one developing country, Oman, and results may differ across other developing countries as each destination has its own unique characteristics, issues, and circumstances. Therefore, the study is appreciated, but care need to be taken concerning generalizing the results beyond this single case, even though the challenges in the neighbouring countries could be similar. Furthermore, the study has certain limitations arising from the research methodology, where data collection problems were encountered. There was some degree of resistance to participate in the research interviews, deferring appointments, and lack of availability of essential stakeholders to supply information necessary for the study. For example, the MOT appeared to be more heavily represented because the researcher had to make several repeat visits as the desired participants were located in Muscat and Salalah. Despite attempts to achieve both representative and diversity in the interviews, the accessibility to some data, and some stakeholders, was difficult. Private companies such as ASAAS and OMRAN posed problems due to managers’ absenteeism from their respective business premises. Most often, they were either on holiday, at work, or just far away. As a result, the interviews could not be conducted in a timely manner for inclusion in the study, and as well as time constraints, the cost of running the research interviews was pressing hard on the researcher.

Another limitation that the researcher experienced was difficulties in finding appropriate published and unpublished information relevant to the study area. The statistics and resulting indicators on the Oman tourism sector face the problem of availability and reliability of data. Also, as compared to other economic sectors for which there is considerable official data at the national level, the tourism sector is distinguished by the weak state of official data collection. It should be noted that it may not be possible to find evidence to support every contention about the development and management of the industry owing to difficulties in obtaining information from public and private sources. There may be a lack of written material about tourism development issues in many developing countries, where almost every kind of information is treated as confidential. Many tables have missing data in Chapter IV: The Case Study, and there is no availability in the number of inbound and outbound flights, hotels and resorts, or contribution to the GDP, before the year 2000. Since the formation of NCSI in 2012, there has been consistency in the numbers as it is considered to be the primary source for the main sectors such as the Ministry (MOT), the Police (ROP), travel airlines and related government authorities. Sadly, there was no clear and sufficient information and reference to give a real picture of the tourism sector and the number of visitors to the Sultanate in the 1980s and the beginning of the 1990s. Only the records of the ROP at the access points (the airports and borders) were available. It is, therefore, not surprising that there is minimal official information upon which to provide a macro-analysis of the tourism sector.

8.3.5 Future Areas of the Study

This study is not an end in itself but a stepping-stone to further research studies. As an avenue for further research, this thesis can be used as the point of departure, as well as a benchmark element, to other studies. This study also achieved the research objectives and answered the majority of the questions either totally or partially, and discovered new cases and issues that are put forward for investigation in future research.

- Does the role of the government vary during the various stages of the destination life cycle (TDLC)?
- How can the regional collaboration among the GCC countries share similar tourism products can be promoted and marketed in the region?
- How would the operating of regional tourism be more beneficial than the national scale? The example between Oman and the UAE.
- To what extend has COVID-19 affected the tourism sector in the GCC Countries?
- To what extent can the application of the conceptual framework be of value to other destinations?
- To what extent has the social media been effective in marketing a destination during and post COVID-19?
- To what extent have tourism infrastructure projects, and investments supported the job market in Oman?

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APPENDICES

APPENDIX I: Survey Questionnaires

A. English & Arabic: The Local Community Questionnaire

UNIVERSITY OF EXETER

Sultanate of Oman
Ministry of Higher Education

PhD Study: Tourism Development and Destination Management: the Case Study of the Sultanate of Oman

Questionnaire Survey: The Satisfaction of the Local Community vis-à-vis the Development of Tourism in Oman

Dear Participant!

My name is Ali Akaak, and I am currently a PhD researcher at the University of Exeter, Business School in the United Kingdom under the Omani Ministry of Higher Education, Research and Innovation, national scholarship. The purpose of the questionnaire survey is to assess the development of the tourism sector from the perspective of the local community: Omanis and residents.

Your data will be aggregated with responses from the local community (Omanis and residents). All data and information collected through this survey must **be treated anonymously,** not be disclosed to any person or organization, **and used exclusively for the present research** and **academic purposes. The researcher should share the survey responses with the Business School at the University of Exeter, and other Omani Authorities such as the Ministry of Tourism and the** Ministry of Higher Education, Research and Innovation**.**

The survey should only take about (8 -10) minutes of your time. To ensure that all information will remain confidential, please **DO NOT** put your name on the survey. Your participation in this questionnaire is voluntary, and you can stop at any point without your responses being included in the dataset. You are under no obligation to participate, and there will be no negative consequences for you or for the person who has asked you to complete this survey if you choose not to participate. You may decline to participate in the whole survey or to choose not to answer any individual question. Further, if you agree to participate, you are free to withdraw from participation at any time during the study.

***Notes for completion*:**

- If a question does not apply to you, or you cannot offer any opinion on it, then please mark "***Not applicable (N/A)***" *or* "***Do Not Know***." When you arrive at the ***final 'thank you' page***, you will know that your responses have been recorded in the database.
- After each section, you will be asked for any further comments on the issues covered, to enable the researcher to gain a better understanding of what has gone well and what has worked less well.
- All the scales in the survey range from "***Definitely Agree***" on the left-hand side to "***Definitely Disagree***" and "***Not Applicable, N/A***" or "***Do Not Know***" on the right-hand side

If you have questions or concerns with any of the issues raised within the survey, please contact the researcher on (+968) 9929 1509 (Oman) or (+44) (0) 78495 24977 (UK), or email:

(aa716@exeter.ac.uk). You may also contact my faculty supervisor, Prof. Gareth Shaw (g.shaw@exeter.ac.uk). If you have any questions regarding your rights as a research participant, please contact the University of Exeter Business School on (+44) (0) 1392 722660 or (info.buildingone@exeter.ac.uk).

Questionnaire Survey: Consent Form for Participant

I have read the Information Sheet for Participants for this study and have had the details of the study explained to me. My questions about the study have been answered to my satisfaction, and I understand that I may ask further questions at any time.

I also understand that I am free to withdraw from the study at any time or to decline to answer any particular questions in the study.

I agree to provide information to the researchers under the conditions of confidentiality set out in the Information Sheet.

I agree to participate in this study under the conditions set out in the Information Sheet form.

Please confirm the above statements by marking both the statements. (If you **do not consent**, then please **close** this browser window to exit the survey).

☐ I agree to fill in the survey questionnaire.
☐ I understand that my data, once analyzed and anonymized, may be published in the researcher's doctoral thesis, and perhaps in her other academic publications (e.g., academic journal articles).

Once you click 'continue,' you will be directed to the first section of the survey.

Many thanks for your participation.

Ali Akaak, (Ph.D. Candidate)

Dear Participant (Omani and Resident)!

Thank you for participating in this questionnaire, which aims to engage with a representative sample of the local community (both Omanis and residents) living in the Sultanate.

To complete this brief questionnaire, please respond to each of the following statements by marking, (✓) the appropriate boxes.

Section One: General Information
This section includes items asking for information related to your demographic details (e.g., gender, age, nationality, etc.), education and employment background.

Statements/Questions	Items
1.1 What is your gender?	○ Male ○ Female
1.2 What is your age group?	○ Below 21 *(Thank you. No need to continue)* ○ 21-30 ○ 31-40 ○ 41-50 ○ 51-60 ○ Over 60
1.3 What is your nationality?	○ Omani ○ Resident: originally from: (*List of countries*)
1.4 What is your employment status?	○ Employed (Public sector/Private sector) ○ Retired ○ Student (Diploma, *BA/BS/*, *MA/MSc*, *PhD*) ○ Other
1.5 Is your employment/study status related to the tourism sector?	○ Yes, it is related ○ No, it is not related ○ Might be, somehow ○ Unsure
1.6 Which of the following region are you from?	○ Ad Dakhiliyah ○ Ad Dhahirah ○ Al Batinah North ○ Al Batinah South ○ Al Buraimi ○ Al Wusta ○ Ash Sharqiyah North ○ Ash Sharqiyah South ○ Dhofar ○ Muscat ○ Musandam

Section Two: The Role of Destination Management Organization (DMO)
The following statements express your opinion about the role of government authorities such as the Ministry of Tourism in managing and developing the tourism sector.

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
2.1 The development of the tourism sector should be fully controlled and						

privatized replacing the Omani government.						
2.2 Tourism projects and activities are based on and related to the community attitudes and needs.						
2.3 The tourism sector has shown an increase in qualified and competent Omanis in both the public and private sectors.						
2.4 Oman's tourism resources (natural and human-made) have been exploited and protected from negative impacts.						
2.5 Most tourism projects and investments are mainly focused on developing accommodation (hotels and resorts), and giving less attention to other attractions (theme parks, festivals, natural sites, etc.)						
2.6 The emphasis of tourism in Oman has been upon maximizing visitor numbers with less attention to their expenditures.						
2.7 The Omani government's efforts and initiatives in developing the tourism sector are well recognized by the local community.						
2.8 The government considers that tourism's economic goals are more important than the negative impacts on the environment and community culture.						

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Section Three: Tourism Destination Planning and Policies
The following statements express your opinion about tourism planning and policies on the development of the Tourism Sector.

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
3.1 The national tourism strategy (NTS) is well known among the local community and can be achievable compared to the previous Vision 2020.						

3.2 The national tourism strategy has been reflected clearly through the projects and investments in the tourism sector.						
3.3 The tourism sector needs a new strategy replacing the current selective tourists (wealthy travellers) strategy to increase the tourism contribution in the Gross Domestic Product (GDP).						
3.4 Tourism policies and regulations have encouraged private sector investments by providing incentives and benefits.						
3.5 Tourism policies and regulations mitigate the negative impacts of tourism, such as the unethical behaviour and practices from local and visitors.						

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Section Four: Tourism Destination Marketing (Image, Branding, and Promoting)
The following statements express your opinion about the marketing and promotion of tourism in Oman.

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
4.1 As a tourism destination, Oman has reached the recognized global level as other GCC countries (UAE, Qatar, Saudi Arabia, etc.).						
4.2 Government authorities and tourism businesses promotional campaigns are more likely focusing on attracting international tourists rather than domestic ones.						
4.3 Tourism promotions and advertising methods, such as participating in international exhibitions, are not enough to represent Oman tourism resources.						
4.4 Marketing promotion schemes do not reflect the destination activities and attractions.						

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Section Five: Destination Tourist Products and Services
The following statements express your opinion as a domestic tourist about the provided products and services. P.S. *Products and Services encompasses Accommodations (Hotels, resorts), Transportation (Flights, public transportation et.), Travel Agents and Tour Operators, Shopping Centers (Malls, retail shops), Public services (utilities, telecommunication etc.), Restaurants, Cafes (Food and Beverages), Tourism Information Centers, Souvenirs Outlets (Traditional Markets/Souq), Museums, Gardens, and Theme parks etc.*

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
5.1 Oman tourism products and services have met the local community (domestic tourist) needs in terms of diversification, availability, accessibility and suitability.						
5.2 Oman tourism products and services have a unique and robust position compared to other destinations such as the UAE and Qatar.						
5.3 Events and programs (such as festivals, exhibitions, and summer packages) have been successful in attracting more visitors during the off-season autumn (Khareef).						
5.4 The current tourism products and services have evolved regularly to cope with visitors' needs and wants.						
5.5 Oman, as a domestic destination, offers a wide range of tourism attractions and activities in which the local community members are able to engage.						
5.6 Tourism mega projects, public services, luxury hotels, and resorts reflect the Sultanate's selective strategy, which seeks wealthy travellers.						

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Section Six: Development of Destination Products and Services
The following statements express your opinion about the priority in developing the tourist's products and services in Oman. In your opinion, what priority do you think the Omani authorities have given to developing the following sectors?

Statements	Essential	High Priority	Medium Priority	Low Priority	Not a priority	Do Not Know
6.1 Developing natural resources (e.g. deserts, beaches, springs, caves etc.)						
6.2 Developing cultural and historical attraction (e.g., forts and castles, arts, museums, traditional cultural etc.)						
6.3 Developing visitor-supporting services (e.g., hotels, resorts, restaurant, shopping malls etc.)						
6.4 Developing Business and convention events (e.g., festivals, exhibitions etc.)						
6.5 Developing sports activities (e.g., hiking, football matches, sailing, fishing, etc.)						
6.6 Developing access procedures (e.g., visas), safety and security programs (e.g., preventing robbery, bribes, etc.).						
6.7 Developing accommodation sectors by building more hotels, resorts, hotel apartments, etc.						
6.8 Developing the transportation sector by having more flights, connecting with more destinations, strong road connections in the country.						
6.9 Developing the country's infrastructure and superstructure through high-quality public services (utilities, telecommunication, etc.)						

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Section Seven: The State of Tourism Development in Oman
The following statements express your opinion about the development of the tourism sector in Oman.

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
7.1 Oman's tourism sector has shown a slow, cumbersome, and incapable rate of change compared to other destinations in the GCC.						

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
7.2 Employment opportunities have shown an increase in the tourism sector compared to other service sectors such as commerce, health, and education.						
7.3 The tourism sector has contributed greatly to Oman’s economy through investments and infrastructure projects.						
7.4 Tourism investments have caused changes in the community social life.						
7.5 The development of the tourism sector has encouraged many small, medium enterprises (SMEs) to establish projects within the sector.						
7.6 Tourism projects and investments have improved the country’s infrastructures and facilities (e.g., roads, telecommunications, utilities, etc.)						

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Section Eight: Local Community Opinion

The following statements express your general opinion about the Oman tourism sector in general.

8.1 Which of the following impedes the development of the tourism sector?

☐ The lack of conducting studies on developing and presenting the overall distinctive ethos of tourism in Oman.
☐ The lack of designing, monitoring and developing programs for government tourism projects.
☐ The lack of partnership between the public and private sector.
☐ Centralization in decision making by government bodies, which limits the development of ethical, sustainable tourism.
☐ The complications of policies and procedures set by the Omani government.
☐ Lack of resources; HR, finance, and technology.
☐ Others: ______________________________ (Max. 50 words)

8.2 Which of the following is a point of strength in the development of the tourism sector?

☐ Strong government support for the development of the sector and its supporting infrastructure.
☐ Accommodation, transportation, and other facilities.
☐ Natural attractions such as landscape, wildlife, and flora.
☐ A wealth of historical sites, which provides a reasonable basis for tourism expansion.
☐ Focusing on the cruise ship industry, which presents related opportunities for local tour operators and hotel chains.
☐ Creating more tourism attractions (human-made).

- ☐ Other: ______________________________ (Max. 50 words)

8.3 Which of the following is a point of weaknesses in the development of the tourism sector?

- ☐ Few direct air connections from countries outside the Gulf.
- ☐ The level of services quality provided within the sector.
- ☐ Slightly over-reliant on domestic tourism to support the industry.
- ☐ The slump in oil prices and the Gulf Crisis (the Qatar–Saudi Arabia diplomatic conflict).
- ☐ Competition from other destinations within the Gulf.
- ☐ Marketing and Promotion.
- ☐ Other: ______________________________ (Max. 50 words)

8.4 Which of the following is the most challenging obstacle that the Omani government (especially the Ministry of Tourism) should overcome to improve and develop the sector?

- ☐ Unclear planning and policies
- ☐ Bureaucracy in decision making (Centralization)
- ☐ Lack of funds and investments
- ☐ Lack of experience
- ☐ Unifying resources
- ☐ Other: ______________________________ (Max. 50 words)

8.5 Which of the following has the largest negative impact on attracting visitors to Oman?

- ☐ Lack of the availability of telecommunication services (Internet, phone signals, etc.)
- ☐ Lack of the availability of information centres
- ☐ Lack of the quality of catering services (restaurants and cafes)
- ☐ Lack of the distribution of the services in many areas in Oman.
- ☐ Lack of the availability of basic utilities (water, electricity, etc.)
- ☐ Lack of entertainment activities in many areas in Oman.
- ☐ Lack of transport services (roads and signs)
- ☐ Other: ______________________________ (Max. 50 words)

8.6 To have a proper development within the tourism sector, there must be a focus on the following:

- ☐ Creating more entertainment projects (shopping malls, theme parks, water parks) distribution around the country.
- ☐ Supporting SMEs in the tourism sector
- ☐ Having more control over the negative practices by many visitors.
- ☐ Having more hotels and resorts.
- ☐ Developing historical places around the country.
- ☐ Other: ______________________________ (Max. 50 words)

8.7 To what extent are you satisfied with the level of tourism development in Oman?

- ☐ Very Satisfied
- ☐ Satisfied, with the need for progress
- ☐ Unsure
- ☐ Dissatisfied
- ☐ Very Dissatisfied, nothing has changed
- ☐ Do Not Know

If answered "**Dissatisfied**" or "**Very Dissatisfied**" please state why: (Optional)

______________________________ (Max. 50 words)

موضوع الدراسة: التنمية السياحية وإدارة الوجهة: سلطنة عمان كدراسة حالة

أستبانة استطلاع: رضا المجتمع المحلي في مقابل تطور السياحة في سلطنة عمان

عزيزي المشارك!

اسمي علي عكعاك ، وأنا حالياً باحث دكتوراه ، كلية إدارة الأعمال، في جامعة إكستر في المملكة المتحدة. الهدف من الاستبيان هو تقييم تطور قطاع السياحة الذي يعتبر واحد من أعمدة النمو الاقتصادي، من منظور المجتمع المحلي: العمانيون والمقيمين. يوفر هذا الاستبيان بيانات ومعلومات تخدم الحكومة العمانية (وزارة السياحة) والقطاع الخاص (مستثمرو الأعمال السياحية) مما يساهم في إنشاء قاعدة بيانات متكاملة حول قطاع السياحة في سلطنة عمان. سيتم تجميع الاجابات (البيانات والمعلومات) الخاصة بك مع ردود أفراد المجتمع المحلي من عمانيين ومقيمين. نؤكد أن إجاباتك ستعامل بسرية تامة (بدون ذكر هوية الشخص)، بحيث تستخدم البيانات والمعلومات بشكل حصري لأغراض البحث وللأغراض الأكاديمية الأخرى ذات العلاقة بتنمية وإدارة القطاع السياحي سواء في سلطنة عمان أو خارجها. كما سيقوم الباحث بمشاركة إجابات الاستطلاع مع كلية إدارة الأعمال في جامعة إكستر وغيرها من الجهات والمؤسسات الحكومية والخاصة العمانية مثل وزارة السياحة ووزارة التعليم العالي والبحث العلمي والابتكار.

أن مدة الأجابة على الاستبيان تقدر بحوالي (8-10 دقائق). لضمان أن تظل جميع المعلومات سرية ، يرجى عدم وضع اسمك على الاستبيان. إن مشاركتك في هذا الاستبيان اختيارية ، ويمكنك التوقف في أي مرحلة دون تضمين ردودك في مجموعة البيانات. أنت غير ملزم بالمشاركة ، ولن تكون هناك أي عواقب سلبية عليك ، أو للشخص الذي طلب منك إكمال هذا الاستبيان إذا اخترت عدم المشاركة. يمكنك رفض المشاركة في الاستبيان بالكامل أو اختيار عدم الإجابة عن أي سؤال فردي. علاوة على ذلك ، إذا وافقت على المشاركة ، فأنت حر في الانسحاب من المشاركة في أي وقت أثناء الأجابة.

ملاحظات مهمة:

- إذا كان السؤال لا ينطبق عليك ، أو لا يمكنك تقديم أي رأي بشأنه ، فيرجى وضع علامة "**لا ينطبق (غير متاح)**" أو "**لا أعرف**" عند وصولك إلى صفحة "**شكرًا لك**" النهائية ، ستعرف أن ردودك قد تم تسجيلها في قاعدة البيانات.
- بعد كل قسم سوف يطلب منك أي تعليقات إضافية حول القضايا التي يتم تغطيتها ، لتمكين الباحث من الحصول على فهم أفضل لما تم العمل به بشكل جيد وما لم يعمل بشكل جيد.
- جميع المقاييس في المسح تتراوح من "**أوافق بالتأكيد**" على الجانب الأيسر إلى "**غير موافق أبدًا**" و "**غير قابل للتطبيق، غير متاح**" أو "**لا أعرف**" على الجانب الأيمن.

إذا كانت لديك أسئلة أو استفسارات تتعلق بأي من المسائل التي أثيرت في الاستطلاع ، يرجى الاتصال بالباحث على (96899291509+) (عمان) أو (7849524977 (0) 44+) (المملكة المتحدة)، أو البريد الإلكتروني: (aa716@exeter.ac.uk)، يمكنك أيضًا الاتصال بالمشرف الأكاديمي، البروفسور غاريث شو على البريد الالكتروني: (g.shaw@exeter.ac.uk) في حالة كان لديك أي أسئلة بخصوص حقوقك كمشارك في الدراسة، يرجى الاتصال بجامعة إكستر، كلية إدارة الأعمال على (722660 1392 (0) 44+) أو (info.buildingone@exeter.ac.uk).

نموذج موافقة للمشارك

لقد قرأت ورقة المعلومات الخاصة بالمشاركة في هذه الدراسة وتم توضيح الهدف من الدراسة و طريقة الإجابة على اسئلة الاستبيان. كما أعلم أنه يحق لي حرية الانسحاب من الدراسة في أي وقت أو رفض الإجابة على أي أسئلة معينة في الاستبيان. كما أني أوافق على المشاركة في هذه الدراسة و تقديم المعلومات للباحثين بموجب شروط السرية المنصوص عليها في ورقة المعلومات.

يرجى تأكيد البيانات أعلاه من خلال وضع علامات على كل من البيانات. (**إذا لم توافق** ، يُرجى **إغلاق** نافذة المتصفح هذه للخروج من الاستبيان).

☐ أوافق على ملء استبيان المسح.

☐ أتفهم أن بياناتي ، بعد تحليلها وإخفاء هويتها ، يمكن نشرها في أطروحة الدكتوراه الخاصة بالباحث ، وربما في منشوراتها الأكاديمية الأخرى (على سبيل المثال ، مقالات المجلات الأكاديمية).

بمجرد النقر فوق "**متابعة**" ، سيتم توجيهك إلى القسم الأول من الاستبيان.

لكم جزيل الشكر لمشاركتكم.

علي عكعاك ، (طالب دكتوراه)

عزيزي المواطن/المقيم!

نشكرك لكونك جزء من هذه الدراسة من خلال المشاركة في هذا الاستبيان والذي يهدف في الحصول على عينة تمثيلية من المجتمع المحلي (العمانيين والمقيمين) في السلطنة حول رضاهم تطوير قطاع السياحة في سلطنة عمان.

لإكمال هذا الاستبيان الموجز، يرجى الرد على كل عبارة من العبارات التالية من خلال وضع علامة، (✓) المربعات المناسبة.

القسم الأول: معلومات عامة	
يتضمن هذا القسم معلومات تتعلق بمعلوماتك الديموغرافية (على سبيل المثال ، النوع ، العمر ، الجنسية ، إلخ) ، الخلفية التعليمية العملية.	
البنود	**العبارات/الاسئلة**
○ ذكر ○ أنثى	1.1 ما هو جنسك؟
○ اقل عن21 (شكرا لكم. لا حاجة للمتابعة) ○ 21-30 ○ 31-40 ○ 41-50 ○ 51-60 ○ فوق ال 60	1.2 ما هي مجموعتك العمرية؟
○ عماني ○ مقيم من: (قائمة الدول)	1.3 ما هي جنسيتك؟
○ موظف (قطاع عام/خاص) ○ متقاعد ○ طالب (دبلوم، بكالوريوس، ماجستير، دكتوراه) ○ أخرى	1.4 ما هو الوضع الوظيفي الخاص بك:
○ نعم ، إنها مرتبطة ○ لا ، لا علاقة لها ○ قد يكون ، على نحو ما ○ غير متأكد	1.5 هل حالة الوظيفة/الدراسة الخاصة بك مرتبطة بقطاع السياحة؟
○ الداخلية ○ الظاهرة ○ شمال الباطنة ○ جنوب الباطنة ○ البريمي ○ الوسطى ○ شمال الشرقية ○ جنوب الشرقية ○ ظفار ○ مسقط ○ مسندم	1.6 أنت من أي محافظة او منطقة؟

القسم الثاني: دور منظمة إدارة الوجهة السياحية
العبارات التالية تعبر عن رأيك حول دور السلطات الحكومية مثل وزارة السياحة في إدارة وتطوير قطاع السياحة.

العبارات	أوافق بشدة	أوافق	محايد	لا أوافق	لا أوافق بشدة	لا أعرف
2.1 ينبغي خصخصة قطاع السياحة بحيث يخضع تطوير القطاع للسيطرة الكاملة من قبل القطاع الخاص ليحل محل الحكومة.						
2.2 تقام المشاريع والأنشطة السياحية بناءً على احتياجات المجتمع المحلي.						
2.3 أظهر قطاع السياحة زيادة في العمانيين المؤهلين في كل من القطاعين العام والخاص.						
2.4 تم حماية الموارد السياحية (الطبيعية والأصطناعية) و استغلالها من الآثار السلبية.						
2.5 تركز معظم المشروعات والاستثمارات السياحية بشكل رئيسي على تطوير أماكن الإقامة (الفنادق والمنتجعات) ، في حين تعطى اهتمام أقل بمناطق الجذب الأخرى (الحدائق، المهرجانات، المواقع الطبيعية ... إلخ.)						
2.6 قد ركزت السياحة العمانية على زيادة أعداد الزائرين مع ضعف قلة الأهتمام بنفقاتهم.						
2.7 إن جهود ومبادرات الحكومة العمانية في تطوير قطاع السياحة معترف بها بشكل جيد من قبل المجتمع المحلي.						
2.8 إن الأهداف الاقتصادية للسياحة تثير قلق الحكومة بشكل كبير من التأثيرات السلبية على البيئة وثقافة المجتمع.						

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القسم الثالث: تخطيط وسياسات الوجهة السياحية
تعبر العبارات التالية عن رأيك في التخطيط والسياسات في تطوير قطاع السياحة.

العبارات	أوافق بشدة	أوافق	محايد	لا أوافق	لا أوافق بشدة	لا أعرف
3.1 إن الاستراتيجية الوطنية للسياحية (رؤية 2040) معروفة جيداً من قبل المجتمع المحلي ويمكن تحقيقها مقارنة بالرؤية السابقة 2020.						
3.2 لقد انعكست الاستراتيجية الوطنية للسياحة بشكل واضح من خلال المشروعات والاستثمارات في قطاع السياحة.						
3.3 يحتاج قطاع السياحة إلى استراتيجية جديدة تحل محل الاستراتيجية الحالية التي تركز على انتقاء نوعية السائحين إلى السلطنة (السائحين الأثرياء) في زيادة مساهمة السياحة في الناتج المحلي الإجمالي.						
3.4 دعمت السياسات واللوائح المتعلقة بالقطاع السياحي استثمارات القطاع الخاص من خلال تقديم حوافز ومزايا للمستثمرين.						
3.5 تخفف السياسات واللوائح المتعلقة بالقطاع السياحي من الآثار السلبية للسياحة مثل بعض الممارسات والسلوك الغير أخلاقي من قبل السكان المحليين و الزائرين.						

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القسم الرابع: تسويق الوجهة السياحة (الصورة، العلامات التجارية والترويج)					
العبارات التالية تعبر عن رأيك حول تسويق وترويج السياحة في سلطنة عمان.					
العبارات	**أوافق بشدة**	**أوافق**	**محايد**	**لا أوافق**	**لا أوافق بشدة**	**لا أعرف**
4.1 لم تصل عُمان كوجهة سياحية إلى المستوى المعروف عالمياً مثل دول مجلس التعاون الخليجي الإمارات العربية المتحدة وقطر والمملكة العربية السعودية الخ.						
4.2 تركز الحكومة وحملات ترويج للشركات السياحية على اجتذاب السائحين الدوليين أكثر من السائحين المحليين!						
4.3 تعتبر طرق التسويق والترويج السياحي مثل المشاركة في المعارض الدولية غير كافية لتقديم المقومات السياحية في السلطنة.						
4.4 خطط وبرامج الترويج و التسويق لا تعكس أنشطة الوجهة وأماكن الجذب.						

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القسم الخامس: المنتجات والخدمات في الوجهة السياحية

العبارات التالية تعبر عن رأيك كسائح محلي حول المنتجات والخدمات المقدمة.

ملاحظة تشمل المنتجات والخدمات الإقامة (الفنادق والمنتجعات) ، والنقل (الرحلات الجوية ، وسائل النقل العام وغيرها) ، وكلاء السفر ومشغلي الرحلات السياحية ، مراكز التسوق (مراكز التسوق ، محلات البيع بالتجزئة) ، الخدمات العامة (المرافق ، الاتصالات ، إلخ) ، المطاعم والمقاهي (الأغذية والمشروبات) ، ومراكز المعلومات السياحية ، ومحلات الهدايا التذكارية (الأسواق / الأسواق التقليدية) ، والمتاحف ، والحدائق ، والمنتزهات الترفيهية وما إلى ذلك.

العبارات	أوافق بشدة	أوافق	محايد	لا أوافق	لا أوافق بشدة	لا أعرف
5.1 تتطابق المنتجات والخدمات السياحية في سلطنة عمان لاحتياجات المجتمع المحلي (السياحة الداخلية) من حيث التنويع والتوافر وإمكانية الوصول والملاءمة إلخ.						
5.2 تتمتع منتجات وخدمات السياحة في سلطنة عمان بمكانة متميزة وقوية من خلال تقديم تجربة مختلفة مقارنة بالوجهات الأخرى مثل الإمارات وقطر وغيرها.						
5.3 لقد نجحت الفعاليات والبرامج (مثل المهرجانات والمعارض والعروض الصيفية) في تحفيز المزيد من الزوار خلال فصل الخريف.						
5.4 تم تطوير المنتجات والخدمات السياحية الحالية بشكل منتظم للتعامل مع التغيرات العالمية.						
5.5 عُمان كواجهة سياحية ، تقدم مجموعة واسعة ومتنوعة من المقومات والأنشطة السياحية التي يمكن لأفراد المجتمع المحلي المشاركة فيها.						
5.6 تعكس المشاريع السياحية الضخمة كالخدمات العامة، والفنادق والمنتجعات الفخمة استراتيجية السلطنة الانتقائية في اختيار نوعية السواح وخاصة الأثرياء.						

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القسم السادس: تطوير منتجات وخدمات الوجهة السياحية
العبارات التالية تعبر عن الأولوية في تطوير منتجات وخدمات السياحة في سلطنة عمان. برأيك ، ما هي الأولوية التي تعتقد أن السلطات العُمانية قد أعطتها لتطوير القطاعات التالية؟

العبارات	أساسي	عالي الأولوية	متوسط الأولوية	منخفض الأولوية	لا توجد أولوية	لا أعرف
6.1 تنمية الموارد الطبيعية (مثل الصحارى والشواطئ والينابيع والكهوف وما إلى ذلك)						
6.2 تطوير المعالم الثقافية والتاريخية (مثل الحصون والقلاع، الفنون، المتاحف، الفنون التقليدية، إلخ.)						
6.3 تطوير خدمات دعم الزوار (مثل الفنادق والمنتجعات والمطاعم ومراكز التسوق وغيرها من الخدمات.						
6.4 تطوير الفعاليات والمناشط التجارية والمؤتمرات (مثل المهرجانات والمعارض وغيرها)						
6.5 تطوير الأنشطة الرياضية (المشي، مباريات كرة القدم، الإبحار، صيد الأسماك ، إلخ.)						
6.6 تطوير إجراءات الدخول الى السلطنة (مثل التأشيرات الالكترونية وغيرها)، وبرامج السلامة والأمن (مثل منع السرقة ، الرشوة ، إلخ).						
6.7 تطوير قطاع الإقامة من خلال بناء المزيد من الفنادق والمنتجعات والشقق الفندقية ، إلخ.						
6.8 تطوير قطاع النقل مثل زيادة عدد الرحلات الجوية، والتواصل مع المزيد من الوجهات الخارجية، وشبكات الطرق.						
6.9 تطوير البنية التحتية والبنية الفوقية للسطنة من خلال خدمات عامة عالية الجودة (المستشفيات، الاتصالات، المرافق العامة، إلخ)						

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القسم السابع: تطوير قطاع السياحة
العبارات التالية تعبر عن رأيك في تطوير قطاع السياحة في عمان.

العبارات	أوافق بشدة	أوافق	محايد	لا أوافق	لا أوافق بشدة	لا أعرف
7.1 أظهرت السياحة في سلطنة عُمان بطء وتعقيداً وعدم القدرة على تغيير معدل قطاع السياحة مقارنة بالوجهات الأخرى في دول مجلس التعاون الخليجي.						
7.2 زاد مستوى فرص العمل في قطاع السياحة مقارنة بقطاعات الخدمية الأخرى مثل التجارة والصحة والتعليم وغيرها.						
7.3 ساهم قطاع السياحة بدرجة كبيرة في الاقتصاد العُماني من خلال الاستثمارات ومشاريع البنية التحتية.						
7.4 أحدثت الاستثمارات السياحية تغييرات في الحياة الاجتماعية للمجتمع.						
7.5 لقد شجع تطوير قطاع السياحة العديد من الشركات المتوسطة والصغيرة (SMEs) على إقامة مشاريع في هذا القطاع.						
7.6 شاركت المشاريع والاستثمارات السياحية في تحسين الهياكل الأساسية والمرافق في السلطنة (مثل الطرق والاتصالات السلكية واللاسلكية والمرافق العامة ... الخ)						

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القسم الثامن: رأي المجتمع المحلي
العبارات التالية تعبر عن رأيك في قطاع السياحة العماني بشكل عام.

8.8 أي مما يلي يعتبر السبب الرئيسي في بطء تطوير قطاع السياحة؟

- ☐ عدم إجراء دراسات حول تطوير السياحة في السلطنة.
- ☐ عدم تصميم ومراقبة وتطوير البرامج لمشاريع السياحة الحكومية.
- ☐ ضعف الشراكة بين القطاعين العام والخاص.
- ☐ المركزية في اتخاذ القرارات من قبل الجهات والهيئات الحكومية.
- ☐ تعقيدات السياسات والإجراءات التي تضعها الجهات والهيئات الحكومية.
- ☐ قلة الموارد؛ البشرية والمالية والتكنولوجيا.
- ☐ اخرى: ______________________ (بحد أقصى 50 كلمة)

8.9 أي مما يلي يعتبر نقطة القوة في تطوير قطاع السياحة؟

- ☐ دعم حكومي قوي لتنمية القطاع والبنية التحتية الداعمة له.
- ☐ أماكن الأقامة كالفنادق ووسائل النقل وغيرها من المرافق.
- ☐ المعالم الطبيعية: كالمناظر الطبيعية والحياة البرية والنباتات.
- ☐ المواقع التاريخية ، التي توفر أساسًا معقولًا للتوسع السياحي.
- ☐ التركيز على السفن السياحية ، والتي تقدم الفرص ذات الصلة لمشغلي الرحلات المحلية وسلاسل الفنادق.
- ☐ حصر المزيد من مناطق الجذب السياحي.
- ☐ أخرى: ______________________ (بحد أقصى 50 كلمة)

8.10 أي مما يلي يعتبر نقطة الضعف في تطور قطاع السياحة؟

- ☐ محدودية الرحلات الجوية المباشرة من دول خارج الخليج.
- ☐ مستوى جودة الخدمات المقدمة في هذا القطاع.
- ☐ الاعتماد الزائد على السياحة الداخلية لدعم الصناعة.
- ☐ الركود في أسعار النفط وأزمة الخليج (الأزمة القطرية الخليجية).
- ☐ التنافس من جهات أخرى في الخليج.
- ☐ التسويق والترويج.
- ☐ أخرى: ______________________ (بحد أقصى 50 كلمة)

8.11 أي مما يلي يمثل العقبة الأكثر صعوبة التي يجب على الحكومة العمانية (بالأخص وزارة السياحة) التغلب عليها لتحسين وتطوير القطاع؟

- ☐ ضعف او عدم وضوح التخطيط والسياسات
- ☐ بيروقراطية في اتخاذ القرار (المركزية)
- ☐ نقص الأموال والاستثمارات
- ☐ نقص الخبرة
- ☐ توحيد الموارد
- ☐ أخرى: ______________________ (بحد أقصى 50 كلمة)

8.12 أي مما يلي له الأثر السلبي الأكبر على جذب الزائرين إلى عمان؟

- ☐ عدم توفر خدمات الاتصالات (الإنترنت ، وإشارات الهاتف ، وما إلى ذلك)
- ☐ عدم توفر مراكز المعلومات
- ☐ عدم جودة خدمات التموين (المطاعم والمقاهي)
- ☐ عدم توزيع الخدمات في العديد من المناطق في سلطنة عمان.
- ☐ عدم توافر المرافق الأساسية (دورات المياه، الماء، والكهرباء وما إلى ذلك)
- ☐ عدم وجود أنشطة ترفيهية في العديد من المناطق في سلطنة عمان.
- ☐ عدم وجود خدمات النقل.
- ☐ أخرى: ______________________ (بحد أقصى 50 كلمة)

8.13 لتحقيق تنمية مناسبة في قطاع السياحة ، يجب أن يكون هناك تركيز على ما يلي:

- ☐ وجود المزيد من المشاريع الترفيهية (مراكز التسوق ، والمتنزهات ، والحدائق المائية ، والتوزيع في جميع أنحاء البلاد).

- ☐ دعم الشركات الصغيرة والمتوسطة في قطاع السياحة
- ☐ وجود المزيد من السيطرة على الممارسات السلبية من قبل العديد من الزوار.
- ☐ وجود المزيد من الفنادق والمنتجعات.
- ☐ تطوير الأماكن التاريخية في جميع أنحاء البلاد.
- ☐ أخرى: ______________________________ (بحد أقصى 50 كلمة)

8.14 إلى أي مدى أنت راضٍ عن مستوى التنمية السياحية في عمان؟

- ☐ راضي جدا
- ☐ راضي ، مع ضرورة التقدم
- ☐ غير متأكد
- ☐ غير راض
- ☐ غير راضٍ للغاية ، لم يتغير شيء
- ☐ لا أعرف

إذا تم الرد على "**غير راض**" أو "**غير راضٍ للغاية**" ، يرجى ذكر السبب: (اختياري) _______________ (بحد أقصى 50 كلمة)

B. English, Arabic, & German: Visitor's Questionnaire

Sultanate of Oman
Ministry of Higher Education

PhD Study: Tourism Development and Destination Management: the Case of the Sultanate of Oman

Questionnaire Survey: The Satisfaction of the Visitors vis-à-vis the Development of Tourism in Oman: Marketing, Promotion, and Tourism Products and Services

Dear Participant!

My name is Ali Akaak, and I am currently a PhD researcher at the University of Exeter, Business School in the United Kingdom under the Omani Ministry of Higher Education, Research and Innovation, national scholarship. The purpose of the survey is to assess the development of the tourism sector from the perspective of visitors (tourists and business travellers).

Your data will be aggregated with responses from visitors, who have been visiting Oman on either holiday or business, and the local community. All data and information collected through this survey must **be treated anonymously,** not be disclosed to any person or organization, **and used exclusively for the present research** and **academic purposes. The researcher should share the survey responses with the Business School at the University of Exeter, and other Omani Authorities such as the Ministry of Tourism and the** Ministry of Higher Education, Research and Innovation**.**

The survey should only take about (8 -10) minutes of your time. To ensure that all information will remain confidential, please **DO NOT** put your name on the survey. Your participation in this questionnaire is voluntary, and you can stop at any point without your responses being included in the dataset. You are under no obligation to participate, and there will be no negative consequences for you, or for the person who has asked you to complete this survey if you choose not to participate. You may decline to participate in the whole survey or choose not to answer any particular question. Further, if you agree to participate, you are free to withdraw from participation at any time during the study.

***Notes for completion*:**

- If a question does not apply to you, or you cannot offer any opinion on it, then please mark "***Not applicable (N/A)****" or "****Do Not Know***." When you arrive at the ***final 'thank you' page***, you will know that your responses have been recorded in the database.
- After each section, you will be asked for any further comments on the issues covered, to enable the researcher to gain a better understanding of what has gone well and what has worked less well.
- All the scales in the survey range from "***Strongly Agree***" on the left-hand side to "***Strongly Disagree***" and "***Not Applicable, N/A***" or "***Do Not Know***" on the right-hand side

If you have questions or concerns with any of the issues raised within the survey, please contact the researcher on (+968) 9929 1509 (Oman) or (+44) (0) 78495 24977 (UK), or email: (aa716@exeter.ac.uk). You may also contact my faculty supervisor, Prof. Gareth Shaw (g.shaw@exeter.ac.uk). If you have any questions regarding your rights as a research participant, please contact the University of Exeter Business School on (+44) (0) 1392 722660 or (info.buildingone@exeter.ac.uk).

Questionnaire Survey: Consent Form for Participant

I have read the Information Sheet for Participants for this study and have had the details of the study explained to me. My questions about the study have been answered to my satisfaction, and

I understand that I may ask further questions at any time.

I also understand that I am free to withdraw from the study at any time or to decline to answer any particular questions in the study.

I agree to provide information to the researchers under the conditions of confidentiality set out in the Information Sheet.

I agree to participate in this study under the conditions set out in the Information Sheet form.

Please confirm the above statements by marking both the statements. (If you **do not consent**, then please *close this browser window to exit the survey*).

☐ I agree to complete the survey questionnaire.
☐ I understand that my data, once analyzed and anonymized, may be published in the researcher's doctoral thesis, and perhaps in other academic publications (e.g., academic journal articles).

Once you click 'continue,' you will be directed to the first section of the survey.

Many thanks for your participation.

Ali Akaak, (Ph.D. Candidate)

APPENDICES

Dear Visitor!

Welcome to the Sultanate of Oman!

Thank you for being a part of this study by participating in this questionnaire, which focuses on the visitors, *tourists and business travellers alike*, in the Sultanate. The survey aims to engage with visitors to obtain information about your experience and satisfaction in the development of the tourism sector in the Sultanate of Oman.

To complete this brief questionnaire, please respond to each of the following statements by choosing the response that best describe your opinion.

Section One: Visitor's General Information (Demographic Characteristics)
This section includes items asking for information related to your demographic details (e.g., gender, age, nationality, etc.), education and employment background.

Statements/Questions	Items
1.1 What is your gender?	○ Male ○ Female
1.2 What is your age group?	○ Below 21 (Thank you. No Need to Continue) ○ 21-30 ○ 31-40 ○ 41-50 ○ 51-60 ○ Over 60
1.3 What is your nationality?	○ Africa: (List of Countries) ○ Asia and the Pacific: (List of Countries) ○ Europe: (List of Countries) ○ The GCC Stats: (List of Countries) ○ The Americas: (List of Countries) ○ The Middle East: (List of Countries) ○ Others: …………………………….
1.4 What is your employment status?	○ Employed (Public/Private Sector) ○ Retired ○ Student (Diploma, *BA/BS/*, *MA/MSc*, *PhD*, *Others*) ○ Other
1.5 Whom do you travel with to Oman?	○ Solo traveller (Alone) ○ Couple ○ Family with children ○ Friends ○ Group of Tourists

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Section Two: Details of Visit
This section includes items asking for information related to your current or previous visit to Oman.

Statements/Questions	Items
2.1 How many times have you visited Oman?	○ First visit (Thank you. No Need to Continue) ○ Twice ○ Three ○ More than three times

2.2 How do you know about Oman?	○ I already knew about Oman ○ Friends and relatives ○ International Travel Exhibitions ○ Internet (Travel and Guidance Websites) ○ Social Media (Facebook, Tweeter, Instagram, etc.) ○ Travel Agency/ Tour operator ○ TV/ Radio/ Newspaper/ Magazines ○ Others: ______________________ (Max. 50 words)
2.3 What is the main purpose of your visit to Oman?	○ A new destination, have not experienced ○ Attending a conference, seminar ○ Leisure (relaxing and rest, shopping, etc.) ○ Natural resources (beaches, desert, mountains, etc.) ○ Official, Business or Professional work ○ Research/ Field trip ○ Sports and Recreation ○ Visiting friends and relatives ○ Others: ______________________ (Max. 50 words)
2.4 What was the primary mode of transport you used to travel here?	○ Air: Flight (Oman Air, others: *list of airways*) ○ Land: car, Bus/Coach, Motorbike, Bicycle ○ Sea: Cruise ship, Own boat
2.5 How long do you intend to stay in Oman? (How many days did you stay in Oman?)	○ Full day ○ Less than three days ○ One Week ○ Fortnight (2 weeks) ○ More than 2 weeks
2.6 Where are you staying during the visit?	○ Hotel and Resorts (List of Star Hotels & Resorts) ○ Local Hotel Apartment ○ Family/Friends/Relatives ○ Camping ○ Others: ______________________ (Max. 50 words)
2.7 How much is your budget to spend during your stay? (*Including accommodation, transportation within Oman, food and drinks, shopping and entertainment expenses, etc.*)	○ Less than 200 OMR (less than €400) ○ 200 – 500 OMR (€400-1000) ○ 500 – 750 OMR (€1000-1500) ○ 750 – 1000 OMR (€1500-2000) ○ More than 1000 OMR (more than €2000)

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Section Three: Destination Marketing and Promotion
The following statements express your opinion about the marketing and promotion of tourism in Oman.

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
3.1 Oman is a well-known tourism destination brand, which reflects its culture, heritage, and natural resources through its tourism						

products and services (hotels, restaurants, shopping malls, etc.).						
3.2 Tourism in Oman has been promoted through marketing campaigns and exhibitions to present the image of the Sultanate internationally.						
3.3 Visitor’s demands have been taken into high consideration in all areas of its operations (accommodation, public transport, tourist attractions, etc.).						
3.4 Social media platforms such as Facebook, Twitter, and Instagram have been effective in promoting the Sultanate globally.						

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Section Four: Destination Products and Services
The following statements express your opinion about the provided products and services. P.S. *Products and Services encompass: Accommodations (Hotels, resorts), Transportation (flights, public transportation et.), Travel Agents and Tour Operators, Shopping Centers (malls, retail shops), Public services (utilities, telecommunication etc.), Restaurants, Cafes (food and beverages), Tourism Information Centers, Souvenir Outlets (traditional markets/Souq), Museums, Gardens, and Theme parks etc.*

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
4.1 The quality and variety of existing products and services (hotels, restaurants, shopping malls, etc.) are matching with the tourist’s expectations and demands.						
4.2 The prices of the provided products and services (hotels, restaurants, shopping mall, etc.) are reasonable and affordable for the visitor.						
4.3 The products and services (hotels, restaurants, shopping malls, etc.) are available and accessible to tourists.						
4.4 Oman, as a tourism destination, offers a wide range of activities (nature, adventures, festivals, etc.) in which the tourist is able to engage.						
4.5 The attractions (natural and human-made) and amenities (hotels, resorts, etc.) are unique and different compared to other destinations in the GCC States.						

Statements	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Do Not Know
4.6 Tourism exhibitions have played a vital role in branding Oman regionally and internationally.						
4.7 Popular festivals and events like *Khareef Salalah*, *Muscat Festivals*, and *Oman Tour* are the main reasons for visiting Oman.						

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Section Five: Development of Destination Products and Services
The following statements express the priority in developing the tourist's products and services in Oman. In your opinion, what priority do you think the Omani authorities have given to developing the following sectors?

Statements	Essential	High Priority	Medium Priority	Low Priority	Not a priority	Do Not Know
5.1 Developing natural resources (e.g., deserts, beaches, springs, caves etc.)						
5.2 Developing cultural and historical attractions (e.g., forts and castles, arts, museums, traditional cultural etc.)						
5.3 Developing visitor-supporting services (e.g., hotels, resorts, restaurant, shopping malls etc.)						
5.4 Developing business and convention events (e.g., festivals, exhibitions etc.)						
5.5 Developing sports activities (e.g., hiking, football matches, sailing, fishing, etc.)						
5.6 Developing access procedures (e.g., visas), safety and security programs (e.g., preventing robbery, bribes, etc.).						
5.7 Developing accommodation sectors through building more hotels, resorts, hotel apartments, etc.						
5.8 Developing the transportation sector by having more flights, connections with more						

Statements	Essential	High Priority	Medium Priority	Low Priority	Not a priority	Do Not Know
destinations, and strong road connections in the country.						
5.9 Developing the country's infrastructure and superstructure through high-quality public services (e.g., utilities, telecommunication, etc.)						

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Section Six: Visitor's General Opinion
The following statements express your general opinion about the tourism sector in Oman.

6.1 To what extent are you satisfied with the level of tourism development in Oman?

- ☐ Very Satisfied
- ☐ Satisfied, with the need for progress
- ☐ Unsure
- ☐ Dissatisfied
- ☐ Very Dissatisfied, nothing has changed

If answered "**Dissatisfied**" or "**Very Dissatisfied**" please state why: (Optional)

______________________________ (Max. 50 words)

6.2 Compared to other GCC Countries (e.g., UAE, Qatar, and Bahrain), Oman as a tourism destination is …

- ☐ Highly Competitive
- ☐ Competitive
- ☐ Somewhat Competitive
- ☐ Not Competitive
- ☐ Not Competitive at All
- ☐ Do Not Know

If answered "**Not Competitive**" or "**Not Competitive at All**", please state why: (Optional)

______________________________ (Max. 50 words)

6.3 To what extent do you find the quality of the offered products and services (accommodations, transportation, public services, attractions, etc.)?

- ☐ Excellent
- ☐ Very Good
- ☐ Good
- ☐ Fair
- ☐ Poor
- ☐ Do Not Know

If answered "**Fair**" or "**Poor**", please state why: (Optional)

______________________________ (Max. 50 words)

6.4 Has your visit to Oman met your expectations?

- ☐ Completely
- ☐ For the greater part
- ☐ Partly
- ☐ Not really
- ☐ Absolutely Not
- ☐ Do Not Know

If answered "**Not really**" or "**Absolutely Not**" please state why: (Optional)

______________________________ (Max. 50 words)

6.5 How would you rate your overall experience in Oman?

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Unsure
- ☐ Dissatisfied
- ☐ Very Dissatisfied
- ☐ Do Not Know

If answered "**Dissatisfied**" or "**Very Dissatisfied**" please state why: (Optional)

______________________________ (Max. 50 words)

6.6 Likelihood of Returning: Are you planning to revisit Oman?

- ☐ Extremely likely
- ☐ Likely
- ☐ Neutral
- ☐ Unlikely
- ☐ Extremely Unlikely
- ☐ Do Not Know

If answered "**Unlikely**" or "**Extremely Unlikely**" please state why: (Optional)

______________________________ (Max. 50 words)

UNIVERSITY OF EXETER

Sultanate of Oman
Ministry of Higher Education

موضوع الدراسة: التنمية السياحية وإدارة الوجهة: سلطنة عمان كدراسة حالة

أستبانة استطلاع: رضا الزائرين في مقابل تطور القطاع السياحي في سلطنة عمان: التسويق والترويج، والمنتجات والخدمات السياحية

عزيزي المشارك!

اسمي علي عكعاك ، وأنا حالياً باحث دكتوراه ، كلية إدارة الأعمال، في جامعة إكستر في المملكة المتحدة. الهدف من الاستبيان هو تقييم تطور قطاع السياحة والذي يعتبر واحداً من أعمدة النمو الاقتصادي، من منظور الزوار (السائحين ورجال الأعمال). يوفر هذا الاستبيان بيانات ومعلومات تخدم الحكومة العمانية (وزارة السياحة) والقطاع الخاص (مستثمرو الأعمال السياحية) مما يساهم في إنشاء قاعدة بيانات متكاملة حول قطاع السياحة في سلطنة عمان. سيتم تجميع الاجابات (البيانات والمعلومات) الخاصة بك مع ردود الزوار الأخرين، الذين يزورون او زارو السلطنة من أجل قضاء عطلة أو العمل. نؤكد أن إجاباتك ستعامل بسرية تامة (بدون ذكر هوية الشخص)، بحيث تستخدم البيانات والمعلومات بشكل حصري لأغراض البحث وللأغراض الأكاديمية الأخرى ذات العلاقة بتنمية وإدارة القطاع السياحي سواء في سلطنة عمان أو خارجها. كما سيقوم الباحث بمشاركة إجابات الاستطلاع مع كلية إدارة الأعمال في جامعة إكستر وغيرها من الجهات والمؤسسات الحكومية والخاصة العمانية مثل وزارة السياحة ووزارة التعليم العالي والبحث العلمي والابتكار.

أن مدة الأجابة على الاستبيان تقدر بحوالي (8-10 دقائق). لضمان أن تظل جميع المعلومات سرية ، يرجى عدم وضع اسمك على الاستبيان. إن مشاركتك في هذا الاستبيان اختيارية ، ويمكنك التوقف في أي مرحلة دون تضمين ردودك في مجموعة البيانات. أنت غير ملزم بالمشاركة ، ولن تكون هناك أي عواقب سلبية عليك ، أو للشخص الذي طلب منك إكمال هذا الاستبيان إذا اخترت عدم المشاركة. يمكنك رفض المشاركة في الاستبيان بالكامل أو اختيار عدم الإجابة عن أي سؤال فردي. علاوة على ذلك ، إذا وافقت على المشاركة ، فأنت حر في الانسحاب من المشاركة في أي وقت أثناء الأجابة.

ملاحظات مهمة:

- إذا كان السؤال لا ينطبق عليك ، أو لا يمكنك تقديم أي رأي بشأنه ، فيرجى وضع علامة **"لا ينطبق (غير متاح)"** أو **"لا أعرف"** عند وصولك إلى صفحة **"شكرًا لك"** النهائية ، ستعرف أن ردودك قد تم تسجيلها في قاعدة البيانات.
- بعد كل قسم سوف يطلب منك أي تعليقات إضافية حول القضايا التي يتم تغطيتها ، لتمكين الباحث من الحصول على فهم أفضل لما تم العمل به بشكل جيد وما لم يعمل بشكل جيد.
- جميع المقاييس في المسح تتراوح من **"أوافق بالتأكيد"** على الجانب الأيسر إلى **"غير موافق أبدًا"** و **"غير قابل للتطبيق، غير متاح"** أو **"لا أعرف"** على الجانب الأيمن.

إذا كانت لديك أسئلة أو استفسارات تتعلق بأي من المسائل التي أثيرت في الاستطلاع ، يرجى الاتصال بالباحث على (+96899291509) (عمان) أو (7849524977 (0) 44+) (المملكة المتحدة)، أو البريد الإلكتروني: (aa716@exeter.ac.uk)، يمكنك أيضًا الاتصال بالمشرف الاكاديمي، البروفسور غاريث شو على البريد الالكتروني: (g.shaw@exeter.ac.uk) في حالة كان لديك أي أسئلة بخصوص حقوقك كمشارك في الدراسة،

يرجى الاتصال بجامعة إكستر، كلية إدارة الأعمال على (722660 1392 (0) 44+) أو (info.buildingone@exeter.ac.uk).

نموذج موافقة للمشارك

لقد قرأت ورقة المعلومات الخاصة بالمشاركة في هذه الدراسة وتم توضيح الهدف من الدراسة و طريقة الإجابة على اسئلة الاستبيان. كما أعلم أنه يحق لي حرية الانسحاب من الدراسة في أي وقت أو رفض الإجابة على أي أسئلة معينة في الاستبيان. كما أني أوافق على المشاركة في هذه الدراسة و تقديم المعلومات للباحثين بموجب شروط السرية المنصوص عليها في ورقة المعلومات.

يرجى تأكيد البيانات أعلاه من خلال وضع علامات على كل من البيانات. (**إذا لم توافق** ، يُرجى إغلاق نافذة المتصفح هذه للخروج من الاستبيان).

☐ أوافق على ملء استبيان المسح.
☐ أتفهم أن بياناتي ، بعد تحليلها وإخفاء هويتها ، يمكن نشرها في أطروحة الدكتوراه الخاصة بالباحث ، وربما في منشوراتها الأكاديمية الأخرى (على سبيل المثال ، مقالات المجلات الأكاديمية).

بمجرد النقر فوق "متابعة" ، سيتم توجيهك إلى القسم الأول من الاستبيان.

لكم جزيل الشكر لمشاركتكم.

علي عكعاك ، (طالب دكتوراه)

عزيزي الزائر!

مرحبا بك في سلطنة عمان!

نشكرك لكونك جزء من هذه الدراسة من خلال المشاركة في هذا الاستبيان الذي يركز على الزائرين (السواح ورجال الأعمال) في السلطنة. يهدف المسح في الحصول على معلومات حول تجربتك ورضاك عن تطوير قطاع السياحي في سلطنة عمان من خلال التركيز على أهم المحاور الرئيسية مثل الخدمات والمنتجات، التسويق والترويج للسياحة.

لإكمال هذا الاستبيان الموجز، يرجى الرد على كل عبارة من العبارات التالية من خلال وضع علامة (✓) في المربعات المناسبة.

القسم الأول: المعلومات العامة للزائر (الخصائص الديموغرافية)	
يتضمن هذا القسم معلومات تتعلق بتفاصيلك الديموغرافية (على سبيل المثال ، الجنس ، العمر ، الجنسية ، إلخ) ، الخلفية التعليمية والتشغيلية.	
البنود	**العبارات/الاسئلة**
○ ذكر ○ أنثى	1.6 ما هو جنسك؟
○ اقل عن 21 (شكرا لكم. لا حاجة للمتابعة) ○ 21-30 ○ 31-40 ○ 41-50 ○ 51-60 ○ فوق ال 60	1.7 ما هي مجموعتك العمرية؟
○ أفريقيا (قائمة الدول): ○ آسيا والمحيط الهادي (قائمة الدول): ○ أوروبا (قائمة الدول): ○ دول مجلس التعاون الخليجي (قائمة الدول): ○ الأمريكتين (قائمة الدول): ○ الشرق الأوسط (قائمة الدول): ○ دول أخرى..................................	1.8 ما هي جنسيتك؟
○ موظف (قطاع عام/خاص) ○ متقاعد ○ طالب (دبلوم، بكالوريوس، ماجستير، دكتوراه) ○ أخرى:	1.9 ما هو وضعك الوظيفي:
○ وحيد (بمفردي) ○ زوجين ○ العائلة مع الأطفال ○ الأصدقاء ○ مجموعة السائحين	1.10 من يرافقك في السفر إلى عمان؟

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القسم الثاني: تفاصيل الزيارة	
يتضمن هذا القسم البنود التي تطلب معلومات تتعلق بالزيارة الحالية أو السابقة لسلطنة عمان.	
البنود	**العبارات /الاسئلة**
○ الزيارة الأولى (شكرا. لا حاجة للمتابعة) ○ مرتين ○ ثلاثة ○ أكثر من ثلاث مرات	2.8 كم مرة زرت عمان؟
○ لدي معلومات كافية عن السلطنة ○ الأصدقاء والأقارب ○ وسائل التواصل الاجتماعي (Facebook، Tweeter، Instagram، إلخ).	2.9 كيف عرفت عن عمان؟

	○ الإنترنت (مواقع السفر والإرشاد) ○ تلفزيون / راديو / جريدة / مجلات ○ وكالة السفر / مشغلي الجولات السياحية ○ معارض السفر والسياحة الدولية ○ أخرى: ________________ (بحد أقصى 50 كلمة)
2.10 ما هو الهدف الرئيسي من زيارتك إلى سلطنة عمان؟	○ وجهة جديدة ، لم ازرها من قبل ○ حضور مؤتمر ، ندوة ○ الترفيه (الاسترخاء والراحة والتسوق ، وما إلى ذلك) ○ الحواس الطبيعية (الشواطئ ، الصحراء ، الجبال ، إلخ) ○ العمل الرسمي أو المهني ○ قيام ببحث / رحلة ميدانية ○ الرياضة والاستجمام ○ زيارة الأصدقاء والأقارب ○ أخرى: ________________ (بحد أقصى 50 كلمة)
2.11 ما هي وسيلة النقل الرئيسية المستخدمه في السفر إلى عمان؟	○ الطيران: (قائمة الخطوط الجوية) ○ البر: سيارة ، حافلة / مدرب ، دراجة نارية ، دراجة ○ البحر: سفينة سياحية ، قارب خاص
2.12 كم هي مدة الزيارة الى عمان؟	○ يوم كامل ○ أقل من ثلاثة أيام ○ أسبوع ○ أسبوعين ○ أكثر من أسبوعين
2.13 أين تقيم خلال الزيارة؟	○ فندق (قائمة فنادق النجمة) ○ شقق فندقية محلية ○ المنتجع (قائمة المنتجعات) ○ العائلة / الأصدقاء / الأقارب ○ التخييم ○ أخرى: ________________ (بحد أقصى 50 كلمة)
2.14 كم تبلغ ميزانيتك لإنفاقها أثناء إقامتك؟ (والتي تتضمن الإقامة ، النقل ، الطعام والشراب ، التسوق ونفقات الترفيه الخ)	○ أقل من 200 ريال عماني (أقل من 400 يورو) ○ 200-500 ريال عماني (400-1000 يورو) ○ 500-750 ريال عماني (1000-1500 يورو) ○ 750-1000 ريال عماني (1500-2000 يورو) ○ أكثر من 1000 ريال عماني (أكثر من 2000 يورو)

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القسم الثالث: تسويق الوجهة السياحية (الصورة ، والعلامات التجارية والترويج)						
العبارات التالية تعبر عن رأيك حول تسويق وترويج السياحة في سلطنة عمان.						
العبارات	أوافق بشدة	أوافق	محايد	لا أوافق	لا أوافق بشدة	لا أعرف
3.1 تعتبر عُمان علامة تجارية معروفة في مجال السياحة مما يعكس ثقافتها وتراثها ومواردها الطبيعية من خلال منتجاتها وخدماتها السياحية (الفنادق والمطاعم ومراكز التسوق وغيرها).						
3.2 الترويج للسياحة في عمان من خلال الحملات التسويقية والمعارض (الاقليمية والدولية) اعطت صورة للسلطنة على المستوى الدولي.						
3.3 تم أخذ متطلبات الزائر بعين الاعتبار في كافة المجالات التشغيلية للقطاع السياحي (الإقامة، وسائل النقل العام، مناطق الجذب السياحي، إلخ).						

العبارات	أوافق بشدة	أوافق	محايد	لا أوافق	لا أوافق بشدة	لا أعرف
3.4 كان دور وسائل التواصل الاجتماعي (Twitter ،Facebook ،Instagram) فعال في الترويج للسلطنة على مستوى العالمي.						

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القسم الرابع: منتجات وخدمات الوجهة

العبارات التالية تعبر عن رأيك حول المنتجات والخدمات المقدمة.

ملاحظة: تشمل المنتجات والخدمات الإقامة (الفنادق والمنتجعات) ، والنقل (الرحلات الجوية ، وسائل النقل العام وغيرها) ، وكلاء السفر ومشغلي الرحلات السياحية ، مراكز التسوق (مراكز التسوق ، محلات البيع بالتجزئة) ، الخدمات العامة (المرافق ، الاتصالات ، إلخ) ، المطاعم والمقاهي (الأغذية والمشروبات) ، ومراكز المعلومات السياحية ، ومحلات الهدايا التذكارية (الأسواق / الأسواق التقليدية) ، والمتاحف ، والحدائق ، والمنتزهات الترفيهية وما إلى ذلك.

العبارات	أوافق بشدة	أوافق	محايد	لا أوافق	لا أوافق بشدة	لا أعرف
4.1 تتطابق جودة التنوع في المنتجات والخدمات القائمة (الفنادق والمطاعم ومراكز التسوق وغيرها) مع توقعات السائح ومطالبه.						
4.2 أسعار المنتجات والخدمات المقدمة (الفنادق، المطاعم، مراكز التسوق، إلخ) معقولة و في متناول الزائرين.						
4.3 المنتجات والخدمات السياحية (الفنادق والمطاعم ومراكز التسوق وغيرها) متوفرة ويمكن الوصول إليها.						
4.4 توفر السلطنة كوجهة سياحية مجموعة واسعة من الأنشطة السياحية (الطبيعة)، المغامرات، المهرجانات، إلخ) والتي يمكن للسائح المشاركة فيها.						
4.5 تعتبر مناطق الجذب السياحي (الطبيعية والاصطناعية) والمرافق (الفنادق والمنتجعات ، إلخ) فريدة ومختلفة مقارنة بالوجهات الأخرى في دول مجلس التعاون الخليجي.						
4.6 لعبت المعارض السياحية دوراً حيوياً في الترويج لعُمان إقليميا ودوليا.						
4.7 تعتبر المهرجانات مثل خريف صلالة ومهرجان مسقط والفعاليات الرياضية كطوافف عمان هي الأسباب الرئيسية لزيارة عمان .						

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القسم الخامس: تطوير منتجات وخدمات الوجهة السياحية

العبارات التالية تعبر عن الأولوية في تطوير منتجات وخدمات السياحة في سلطنة عمان.
برأيك ، ما هي الأولوية التي تعتقد أن السلطات العُمانية قد أعطتها لتطوير القطاعات التالية؟

العبارات	أساسي	عالي الأولوية	متوسط الأولوية	منخفض الأولوية	لا توجد أولوية	لا أعرف
5.1 تنمية الموارد الطبيعية (مثل الصحارى والشواطئ والينابيع والكهوف وما إلى ذلك)						
5.2 تطوير المعالم الثقافية والتاريخية (مثل الحصون والقلاع، الفنون، المتاحف، الفنون التقليدية، إلخ.)						

العبارات	أساسي	عالي الأولوية	متوسط الأولوية	منخفض الأولوية	لا توجد أولوية	لا أعرف
5.3 تطوير خدمات دعم الزوار (مثل الفنادق والمنتجعات والمطاعم ومراكز التسوق وغيرها من الخدمات.						
5.4 تطوير الفعاليات والمناشط التجارية والمؤتمرات (مثل المهرجانات والمعارض وغيرها)						
5.5 تطوير الأنشطة الرياضية (المشي، مباريات كرة القدم، الإبحار، صيد الأسماك ، إلخ.)						
5.6 تطوير إجراءات الدخول الى السلطنة (مثل التأشيرات الالكترونية وغيرها)، وبرامج السلامة والأمن (مثل منع السرقة ، الرشوة ، إلخ).						
5.7 تطوير قطاع الإقامة من خلال بناء المزيد من الفنادق والمنتجعات والشقق الفندقية ، إلخ.						
5.8 تطوير قطاع النقل مثل زيادة عدد الرحلات الجوية، والتواصل مع المزيد من الوجهات الخارجية، وشبكات الطرق.						
5.9 تطوير البنية التحتية والبنية الفوقية للسطنة من خلال خدمات عامة عالية الجودة (المستشفيات، الاتصالات، المرافق العامة، إلخ)						

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القسم السادس: الرأي العام للزائر

العبارات التالية تعبر عن رأيك في القطاع السياحي في سلطنة عمان بشكل عام.

6.7 إلى أي مدى أنت راضٍ عن مستوى تطور السياحة في عمان؟

- ☐ راضي جدا
- ☐ راضي ، مع ضرورة التقدم
- ☐ غير متأكد
- ☐ غير راض
- ☐ غير راضٍ للغاية ، لم يتغير شيء

إذا تم الرد على "**غير راض**" أو "**غير راضٍ للغاية**" ، يرجى ذكر السبب: (اختياري) ______________ (بحد أقصى 50 كلمة)

6.8 مقارنة ببلدان مجلس التعاون الخليجي (مثل الإمارات العربية المتحدة وقطر والبحرين) ، تعتبر عمان كوجهة سياحية...

- ☐ منافس قوي
- ☐ منافسة
- ☐ منافسة إلى حد ما
- ☐ غير منافسة
- ☐ غير منافسة على الإطلاق
- ☐ لا أعرف

إذا كانت الإجابة "**غير منافسة** " أو "**غير منافسة على الإطلاق**" ، يُرجى ذكر السبب: (اختياري) ______ (بحد أقصى 50 كلمة)

6.9 إلى أي مدى تجد جودة المنتجات والخدمات المقدمة (الإقامة ، النقل ، الخدمات العامة ، الأماكن السياحية ، إلخ)؟

- ☐ ممتاز
- ☐ جيد جدا
- ☐ حسن
- ☐ معتدل
- ☐ ضعيف
- ☐ لا أعرف

إذا كانت الإجابة "**معتدل**" أو "**ضعيف**" ، يرجى ذكر السبب: (اختياري) ________________________ (بحد أقصى 50 كلمة)

6.10 هل حققت زيارة إلى السلطنة توقعاتك؟

- ☐ تماما
- ☐ بشكل كبير
- ☐ جزئيا
- ☐ ليس بالفعل
- ☐ لا على الاطلاق
- ☐ لا أعرف

☐ إذا كانت الإجابة " **ليس بالفعل**" أو "**لا على الاطلاق**" يرجى ذكر السبب: (اختياري) ______________ (بحد أقصى 50 كلمة)

6.11 كيف تقيم زيارتك إلى السلطنة؟

- ☐ راضي جدا
- ☐ راضي
- ☐ غير متأكد
- ☐ غير راض
- ☐ غير راضٍ للغاية
- ☐ لا أعرف

إذا تم الرد على "غير راض" أو "غير راضٍ للغاية" ، يرجى ذكر السبب: (اختياري) ______________ (بحد أقصى 50 كلمة)

6.12 هل تخطط لإعادة زيارة إلى السطنـة؟

- ☐ محتمل للغاية
- ☐ محتمل
- ☐ محايد
- ☐ غير محتمل
- ☐ غير محتمل أبدا
- ☐ لا أعرف

إذا كانت الإجابة "غير محتمل" أو "غير محتمل للغاية" ، يُرجى ذكر السبب: (اختياري) ______________ (بحد أقصى 50 كلمة)

PhD-Studie: Tourismusentwicklung und Destination Management: Fallstudie zum Sultanat Oman

Fragebogenumfrage: Die Zufriedenheit der Besucher mit der Entwicklung des Tourismus, des Marketing, der Promotion, der Tourismusprodukte und der Dienstleistungen im Oman

Liebe/r TeilnehmerIn!

Mein Name ist Ali Akaak, ich bin Doktorand an der Business School der Universität Exeter in Großbritannien. Ich studiere mithilfe eines Stipendiums des Omanischen Ministeriums für Hochschulbildung. Die Fragebogenerhebung dient dazu, die Entwicklung des Tourismussektors aus Sicht der Besucher, sowohl von Touristen als auch Geschäftsreisenden, zu beurteilen.

Ihre Daten werden zusammen mit den Antworten anderer Teilnehmer erfasst, welche den Oman auf Urlaubs-oder Geschäftsreise besucht haben. Die gesammelten Daten und Informationen werden anonym und vertraulich behandelt; nicht an dritte Personen oder Organisationen weitergegeben und dienen ausschließlich für die vorliegenden akademischen Forschungszwecke. Der Forscher wird die Umfrageergebnisse ausschließlich in anonymisierter Form mit der Business School der Universität Exeter, dem Ministerium für Tourismus und dem Ministerium für Hochschulbildung teilen.

Die Teilnahme an der Umfrage sollte nur etwa 8 -10 Minuten Ihrer Zeit beanspruchen. Um sicherzustellen, dass alle Informationen vertraulich bleiben, sollten Sie Ihren Namen in der Umfrage NICHT angeben. Ihre Teilnahme an diesem Fragebogen ist freiwillig und Sie können jederzeit aufhören, ohne dass Ihre Antworten in den Datensatz aufgenommen werden. Sie sind nicht zur Teilnahme verpflichtet und eine Nichtteilnahme wird keine negativen Konsequenzen für Sie oder für die Person, die Sie gebeten hat, diese Umfrage auszufüllen, haben. Wenn Sie der Teilnahme zustimmen, können Sie jederzeit während der Studie von der Teilnahme zurücktreten.

Hinweise zum Abschluss:

- Wenn eine Frage nicht auf Sie zutrifft oder Sie keine Meinung dazu abgeben können, dann markieren Sie bitte "**Nicht zutreffend (N / A)**" oder "**Weiß nicht**". Wenn Sie auf der letzten "**Danke**" -Seite ankommen, bestätigt dies, dass Ihre Antworten in der Datenbank gespeichert wurden.
- Nach jedem Abschnitt werden Sie um weitere Kommentare zu den behandelten Themen gebeten, damit der Forscher besser verstehen kann, welche Aspekte Ihres Aufenthalts Sie als zufriedenstellend erlebt haben und was weniger gut funktioniert hat.
- Alle Antwortskalen in der Umfrage reichen von "**Stimme voll zu**" auf der linken Seite zu "**Stimme überhaupt nicht zu**" und "**Nicht zutreffend, N / A**" oder "**Weiß nicht**" auf der rechten Seite

Wenn Sie Fragen oder Anmerkungen zu einer der Fragen in der Umfrage haben, wenden Sie sich bitte an den Forscher unter (+968) 9929 1509 (Oman), (+44) (0) 78495 24977 (Großbritannien) oder per E-Mail: (aa716 @ exeter.ac.uk). Sie können sich auch an meinen Fakultätsleiter, Prof. Gareth Shaw (g.shaw@exeter.ac.uk) wenden. Wenn Sie Fragen zu Ihren Rechten als Forschungsteilnehmer haben, wenden Sie sich bitte an die University of Exeter Business School unter (+44) (0) 1392 722660 oder E-Mail (info.buildingone@exeter.ac.uk).

Fragebogenumfrage: Einverständniserklärung für Teilnehmer

Ich habe das Informationsblatt für Teilnehmer für diese Studie gelesen und mir wurden die Details der Studie erklärt. Meine Fragen zur Studie wurden zu meiner Zufriedenheit beantwortet, und ich verstehe, dass ich jederzeit weitere Fragen stellen kann.

Ich verstehe auch, dass es mir freisteht, mich jederzeit aus der Studie zurückzuziehen oder einzelne Fragen in der Studie nicht zu beantworten. Ich bin damit einverstanden, den Forschern Informationen unter den Bedingungen der Vertraulichkeit zur Verfügung zu stellen, die im Informationsblatt dargelegt sind.

Ich stimme der Teilnahme an dieser Studie unter den Bedingungen zu, die im Informationsblatt dargelegt wurden.

Bitte bestätigen Sie die obigen Aussagen, indem Sie beide Aussagen ankreuzen. (Wenn Sie nicht zustimmen, schließen Sie bitte dieses Browserfenster, um die Umfrage zu beenden).

- ☐ Ich bin damit einverstanden, den Fragebogen auszufüllen.
- ☐ Ich verstehe, dass meine Daten, wenn sie einmal analysiert und anonymisiert wurden, in der Doktorarbeit des Forschers und möglicherweise in anderen wissenschaftlichen Veröffentlichungen (z. B. Artikeln in akademischen Zeitschriften) veröffentlicht werden können.

Sobald Sie auf "Weiter" klicken, werden Sie zum ersten Abschnitt der Umfrage weitergeleitet.

Vielen Dank für Ihre Teilnahme.

Ali Akaak, (Doktorand)

Lieber Besucher!

Willkommen im Sultanat Oman!

Danke, dass Sie an dieser Studie teilnehmen, indem Sie diesen Fragebogen ausfüllen, der sich an Besucher, *sowohl Touristen als auch Geschäftsreisende*, im Sultanat richtet. Ziel der Umfrage ist es, mit den Besuchern zu interagieren, um Informationen über deren Erfahrung und Zufriedenheit in der Entwicklung des Tourismussektors im Sultanat Oman zu erhalten.

Um diesen kurzen Fragebogen auszufüllen, antworten Sie bitte auf jede der folgenden Aussagen, indem Sie die entsprechenden Felder ankreuzen (✓), die Ihre Meinung am besten beschreiben.

Abschnitt Eins: Allgemeine Informationen des Besuchers (Demografische Merkmale)	
Dieser Abschnitt enthält Elemente, in denen nach Informationen zu Ihren demografischen Merkmalen (z. B. Geschlecht, Alter, Nationalität usw.), Ausbildung und Beschäftigungshintergrund gefragt wird.	
Aussagen / Fragen	**Artikel**
2.1 Was ist Ihr Geschlecht?	○ Männlich ○ Weiblich
2.2 Welcher Altersgruppe gehören Sie an?	○ Unter 21 (Danke. Sie müssen nicht fortfahren) ○ 21-30 ○ 31-40 ○ 41-50 ○ 51-60 ○ über 60
2.3 Was ist Ihre Staatsangehörigkeit?	○ Afrika: (Liste der Länder) ○ Asien und Pazifik: (Liste der Länder) ○ Europa: (Liste der Länder) ○ Die GCC-Länder: (Liste der Länder) ○ Amerika: (Liste der Länder) ○ Der Nahe Osten: (Liste der Länder) ○ Andere: ....
2.4 Was ist Ihr Beschäftigungsstatus?	○ Angestellt (öffentlicher / privater Sektor) ○ Ruhestand ○ Student (Diplom, BA / BS /, MA / MSc, Ph.D., Andere) ○ Andere
2.5 Mit wem reisen Sie in den/im Oman?	○ Allein ○ Paar ○ Familie mit Kindern ○ Freunde ○ Reisegruppe

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Abschnitt Zwei: Details zu Ihrem Besuch	
Dieser Abschnitt enthält Informationen zu Ihrem aktuellen oder früheren Besuch im Oman.	
Aussagen / Fragen	**Artikel**
2.1 Wie oft haben Sie Oman besucht?	○ Erster Besuch (Danke. Sie müssen nicht fortfahren) ○ Zweimal ○ Dreimal ○ Mehr als dreimal

2.2 Wie haben Sie vom Oman als Reiseziel erfahren?	○ Ich hatte schon vom Oman gehört ○ Freunde und Verwandte ○ Soziale Medien (Facebook, Twitter, Instagram usw.) ○ Internet (Reise-und Beratungswebseiten) ○ TV / Radio / Zeitung / Zeitschriften ○ Reisebüro / Reiseveranstalter ○ Reiseausstellung / Messen ○ Andere: ____________________ (Max. 50 Wörter)
2.3 Was ist der Hauptgrund Ihres Besuchs im Oman?	○ Neues, noch unbekanntes Reiseziel ○ Teilnahme an einer Konferenz, einem Seminar ○ Freizeit (Entspannen, Ausruhen, Einkaufen, etc.) ○ Naturerlebnisse (Strände, Wüste, Berge, etc.) ○ Offizielle, geschäftliche oder berufliche Aufgaben ○ Forschung / Exkursion ○ Sport und Erholung ○ Freunde und Verwandte besuchen ○ Andere: ____________________ (Max. 50 Wörter)
2.4 Welches Haupttransportmittel haben Sie zur Anreise genutzt?	○ Luft: Flug (Oman Air, andere: Liste der Fluglinien) ○ Land: Auto, Bus / Reisebus, Motorrad, Fahrrad ○ Meer: Kreuzfahrtschiff, eigenes Boot
2.5 Wie lange beabsichtigen Sie im Oman zu bleiben?	○ Einen Tag ○ Weniger als drei Tage ○ Eine Woche ○ Zwei Wochen ○ Mehr als 2 Wochen
2.6 Wo wohnen Sie während Ihres Besuchs?	○ Hotel/Resort (Liste der Sterne-Hotels) ○ Ferienwohnung ○ Familie / Freunde / Verwandte ○ Camping ○ Andere: ____________________ (Max. 50 Wörter)
2.7 Wie hoch ist Ihr Budget für Ihren Aufenthalt? (*Inklusive Unterkunft, Transport innerhalb Omans, Essen und Trinken, Einkaufs- und Unterhaltungskosten etc.*)	○ Weniger als 200 OMR (weniger als €400) ○ 200-500 OMR (€400-1000) ○ 500-750 OMR (€1000-1500) ○ 750-1000 OMR (€1500-2000) ○ Mehr als 1000 OMR (mehr als €2000)

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Dritter Abschnitt: Destination Marketing (Image, Branding und Werbung)
Die folgenden Aussagen drücken Ihre Meinung über die Vermarktung und Förderung des Tourismus in Oman aus.

Aussagen	Stimme voll und ganz zu	Stimme zu	Neutral	Stimme nicht zu	Stimme ganz und gar nicht zu	Weiß nicht
2.1 Oman ist ein bekanntes touristisches Reiseziel, dessen Kultur, sein Kulturerbe und Naturschönheiten in seinen touristischen Angeboten und						

Dienstleistungen (Hotels, Restaurants, Einkaufszentren, etc.) reflektiert wird.						
3 Der Tourismus im Oman wurde durch Marketingkampagnen und Messen gefördert, um das Image des Sultanats als einzigartiges Reiseziel international zu präsentieren.						
4 Die Ansprüche der Besucher wurden in allen Bereichen des Tourismussektors (Unterkunft, öffentlicher Verkehr, Touristenattraktionen usw.) berücksichtigt.						
5 Social-Media-Programme wie Facebook, Twitter und Instagram haben das Sultanat weltweit erfolgreich beworben.						

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Vierter Abschnitt: Zielangebote und -dienstleistungn

Die folgenden Aussagen drücken Ihre Meinung zu den touristischen Angeboten und Dienstleistungen aus.

P.S. Angebote und Dienstleistungen umfassen Unterkünfte (Hotels, Resorts), Transport (Flüge, öffentliche Verkehrsmittel et.), Reisebüros und Reiseveranstalter, Einkaufszentren (Einkaufszentren, Einzelhandelsgeschäfte), Öffentliche Dienstleistungen (Versorgungsunternehmen, Telekommunikation etc.), Restaurants, Cafés (Speisen und Getränke), Tourismusinformationszentren, Souvenirläden (traditionelle Märkte / Souq), Museen, Gärten und Themenparks usw.

Aussagen	Stimme voll und ganz zu	Zustimmen	Neutral	Stimme nicht zu	Stimme ganz und gar nicht zu	Weiß nicht
4.8 Die Qualität und Vielfalt bestehender Angebote und Dienstleistungen (Hotels, Restaurants, Einkaufszentren usw.) entspricht den Erwartungen und Anforderungen des Touristen.						
4.9 Die Preise der vorhandenen Angebote und Dienstleistungen (Hotels, Restaurants, Einkaufszentren usw.) sind für den Besucher angemessen und erschwinglich.						
4.10 Die Angebote und Dienstleistungen für Touristen (Hotels, Restaurants,						

Aussagen	Stimme voll und ganz zu	Zustimmen	Neutral	Stimme nicht zu	Stimme ganz und gar nicht zu	Weiß nicht
Einkaufszentrum usw.) sind verfügbar und zugänglich.						
4.11 Oman als Reiseziel bietet eine breite Palette von touristischen Aktivitäten und Unternehmungen (Natur, Abenteuer, Festivals usw.).						
4.12 Die Touristenattraktionen (z. B. Naturschönheiten) und Annehmlichkeiten (Hotels, Resorts usw.) sind einzigartig und unterscheiden sich von anderen Zielen in den GCC-Staaten.						
4.13 Tourismusmessen haben eine wichtige Rolle bei der regionalen und internationalen Markenentwicklung Omans als Reiseziel gespielt.						
4.14 Festivals und Veranstaltungen wie *Khareef Salalah*, *Muscat Festival* **und** *Oman Tour* sind die Hauptgründe für einen Besuch in Oman.						
4.15 Omanische Touristenattraktionen (natürliche und von Menschenhand geschaffene) sind einzigartig im Vergleich zu anderen Reisezielen in den Golfstaaten.						

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Abschnitt Fünf: Entwicklung von Zielangeboten und -dienstleistungen
Die folgenden Aussagen drücken Ihre Meinung über die Priorität bei der Entwicklung der touristischen Angebote und Dienstleistungen im Oman aus. Welche Priorität haben, Ihrer Meinung nach, die omanischen Behörden der Entwicklung der folgenden Sektoren eingeräumt?

Aussagen	Sehr hohe Priorität	Hohe Priorität	Mittlere Priorität	Niedrige Priorität	Keine Priorität	Weiß nicht
5.10 Entwicklung von Naturschönheiten (z. B. Wüsten, Strände, Quellen, Höhlen usw.)						

Aussagen	Sehr hohe Priorität	Hohe Priorität	Mittlere Priorität	Niedrige Priorität	Keine Priorität	Weiß nicht
5.11 Entwicklung kultureller und historischer Attraktionen (z. B. Festungen und Schlösser, Kunst, Museen, Folklore usw.)						
5.12 Entwicklung von Tourismus unterstützenden Dienstleistungen (z.B. Hotels, Resorts, Restaurants, Einkaufszentren usw.)						
5.13 Entwicklung von Geschäfts- und Kongressveranstaltungen (z. B. Festivals, Ausstellungen usw.)						
5.14 Entwicklung von Sportaktivitäten (Wandern, Fußball, Segeln, Angeln, Fahrradfahren etc.)						
5.15 Entwicklung von Zugangsverfahren (z. B. Visa), Sicherheit und Sicherheitsprogrammen (z. B. Verhinderung von Raub, Bestechung usw.).						
5.16 Entwicklung von Unterkünften durch den Bau von Hotels, Resorts, Ferienwohnungen usw.						
5.17 Entwicklung des Verkehrssektors durch mehr Flüge, Erschließung neuer Ziele, besseres Straßennetz.						
5.18 Entwicklung der Infrastruktur und des Überbaus des Landes durch Bereitstellung hochwertiger öffentlicher Dienstleistungen (Versorgungsunternehmen, Telekommunikation usw.)						

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Sechster Abschnitt: Allgemeine Meinung des Besuchers
Die folgenden Aussagen drücken Ihre allgemeine Meinung über den Tourismussektor im Oman aus.
2.1 Inwieweit sind Sie mit dem Niveau der Tourismusentwicklung im Oman zufrieden?

☐ Sehr zufrieden
☐ Zufrieden, eine weitere Entwicklung ist jedoch nötig
☐ Unsicher
☐ Unzufrieden
☐ Sehr unzufrieden, nichts hat sich geändert

Wenn Sie mit "**Unzufrieden**" oder "**Sehr unzufrieden**" antworten, geben Sie bitte an, warum: (Optional) ________________________ (Max. 50 Wörter)

2.2 Im Vergleich zu den Golfstaaten (z. B. den Vereinigte Arabische Emirate, Qatar und Bahrain) ist Oman als Tourismusziel ...

☐ Sehr wettbewerbsfähig
☐ Wettbewerbsfähig
☐ Etwas wettbewerbsfähig
☐ Nicht wettbewerbsfähig
☐ überhaupt nicht wettbewerbsfähig
☐ Weiß nicht

Wenn die Antwort "**Nicht wettbewerbsfähig**" oder "**überhaupt nicht wettbewerbsfähig**" lautet, geben Sie bitte an, warum: (Optional) ______________________ (Max. 50 Wörter)

2.3 Wie beurteilen Sie die Qualität der touristischen Angebote und Dienstleistungen (Unterkünfte, Transport, öffentliche Dienstleistungen, Attraktionen usw.)?

☐ Ausgezeichnet
☐ Sehr gut
☐ Gut
☐ Mittelmäßig
☐ Schlecht
☐ Weiß nicht

Wenn Sie mit "**Mittelmäßig**" oder " **Schlecht**" geantwortet haben, bitte angeben, warum: (Optional)
_______________________________ (Max. 50 Wörter)

2.4 Hat Ihr Besuch im Oman Ihre Erwartungen erfüllt?

☐ Vollständig
☐ Zum größten Teil
☐ Teilweise
☐ Nicht wirklich
☐ Absolut nicht
☐ Weiß nicht

Wenn Sie "Nicht wirklich" oder "Absolut nicht" antworten, geben Sie bitte an, warum: (Optional)
_______________________________ (Max. 50 Wörter)

2.5 Wie zufrieden waren Sie mit Ihrer Erfahrung im Oman im Allgemeinen?

☐ Sehr zufrieden
☐ Zufrieden
☐ Unsicher
☐ Unzufrieden

- ☐ Sehr unzufrieden
- ☐ Weiß nicht

Wenn Sie mit "**Unzufrieden**" oder "**Sehr unzufrieden**" antworten, geben Sie bitte an, warum: (Optional)______________________________ (Max. 50 Wörter)

2.6 Wahrscheinlichkeit der Rückkehr: Planen Sie, den Oman noch einmal zu besuchen?

- ☐ Sehr wahrscheinlich
- ☐ Wahrscheinlich
- ☐ Neutral
- ☐ Unwahrscheinlich
- ☐ Äußerst unwahrscheinlich
- ☐ Weiß nicht

- ☐ Wenn Si emit "**Unwahrscheinlich**" oder "**Äußerst unwahrscheinlich**" geantwortet haben, geben Sie bitte an, warum: (Optional) ______________________________ (Max. 50 Wörter)

APPENDIX II: Interview Questions

A. English: Government Officials and Tourism Business Managers, Interview Questions

Sultanate of Oman
Ministry of Higher Education

PhD Study:
Tourism Development and Destination Management: the Case of the Sultanate of Oman

Interview: Consent Form for Participant in the Omani Public and Private Sectors

Dear Participant!

My name is Ali Akaak, and I am currently a PhD researcher at the University of Exeter, Business School in the United Kingdom under the Omani Ministry of Higher Education, Research and Innovation, national scholarship. This research study aims to examine the development of tourism in Oman within the context of destination management and marketing. The information gathered from the study should be used by the University of Exeter Business School, and the Omani Government represented in the Ministry of Tourism, and other authorities in the Sultanate. The interview should last for an hour and a half, and your participation in this study is voluntary. You are under no obligation to participate, and there will be no negative consequences for you, or for the person who invited you to be interviewed if you choose not to participate. For the safety and benefits of your organization and yourself, I will disguise your name in the final report to be submitted to any organization to achieve anonymity.

You are assured that the study does not expose you to any potential risk as a result of your participation. However, if you have any concern about this issue, please feel free to raise it. Absolute anonymity cannot be guaranteed due to the case study nature of the research. Confidentiality will be upheld: comments made will not be attributed to you in name, role or characteristics. However, you have the right to have comments attributed to you if you wish. Audio recordings and transcripts will be coded, and identifying information will be stored elsewhere. All data is password protected. You have the right to withdraw at any time.

Could I please tape-record this interview, as it will assist me with my data analysis? If "***yes***", feel free to push the "***pause***" button of the tape recorder at any time during the interview.

- ☐ I, the participant, confirm that: I have been briefed about this research project and its purpose and agree to participate.
- ☐ I have discussed any requirements for anonymity or confidentiality with the researcher.
- ☐ I agree to being audio-taped / videotaped during the interview.

If you have questions or concerns with any of the issues raised within the interview, please contact the researcher on (+968) 9929 1509 (Oman) or (+44) (0) 78495 24977 (UK), or email: (aa716@exeter.ac.uk). You may also contact my faculty supervisor, Prof. Gareth Shaw (g.shaw@exeter.ac.uk). If you have any questions regarding your rights as a research participant, please contact the University of Exeter Business School on (+44) (0) 1392 722660 or (info.buildingone@exeter.ac.uk).

Interviewee's signature: ……………………………………………………….……………………

Do you have any further questions regarding the objectives or procedure of the interview?

This interview guide is not a questionnaire but provides a framework for the interview.

Case No.: ……………	Date: ……………………..….	Interview time: ………..………
Organization's Name:	…………………………………………………….…………………	
Type of Organization:	( ) Pubic ( ) Private ( ) Other: ………..………	
Interviewee's Name:	…………………………………………………….…………………	
Interviewee's Job Title:	…………………………………………………….…………………	
Interviewee's Education Level:	Diploma, BA/BS, MA/MSc, PhD: ………………..………. Others: …………………………………….…………	
Years in Tourism Sector:	…………………………………………………….…………………	
Interviewee's Background:	…………………………………………………….…………………	
Researcher's signature:	…………………………………………………….…………………	

Interview: Participant in the Public Sector (The Ministry of Tourism and Other Government Authorities)

Oman as a Tourism Destination:

1. What are the main tourism activities that the Omani government should focus on to achieve the current vision 2020 and later vision 2040? Why do you think those activities are important?
2. What are the main achievements that the Omani government has reached the tourism sector?
3. Do you think that Oman is positioning itself properly in the tourism destination map? If not, what should be done?
4. Do you think Oman can compete with the neighbouring countries like UAE, Bahrain, and Qatar? If No, why, If Yes, how?
5. To what extent do you think the success of adopting the "*selective tourist*" strategy in enhancing the economic sector contribution? What is the possibility of adopting another strategy (e.g., *selective investment*)?

Government as a Destination Management Organization (DMO):

1. What is the Ministry strategy in managing tourism sector?
2. In your opinion, how does the government control and restrict the tourism sector regarding planning, procedures, regulations, etc.?
3. What is the Ministry strategy to overcome the obstacles (threats) that hinder the sector investments such as a high government budget deficit resulted from the oil price crisis?
4. How does the Ministry collaborate with the private sector? What kind of support (incentives and facilities) does the Ministry provide to encourage tourism businesses (local and international) investment in the tourism sector?
5. To what extent do you think there is a collaboration among the Ministry of Tourism and other government authorities such as the Ministry of Heritage and Cultural, and the Ministry of Municipalities responsible for tourism policy, and planning control, improving tourism products and services, conducting festivals, adding new attractions, setting policies and procedures? How do they overcome the overlapping?

Oman Tourism Planning and Policies: The National Tourism Strategy (Vision 2040)

1. In your opinion, what makes Oman Vision 2040 different from the Vision 2020? How will the vision 2040 complete 2020?
2. What are the enablers and barriers to the success of Oman Tourism 2040?
3. What are the challenges that hinder monitoring and following up the implementation of the national tourism strategy (Vision 2040)?
4. To what extent, do you think, will/does the oil price crisis affect the achieving of the national tourism strategy 2040?
5. What are the reasons, do you think, behind, ranking Oman in the fifth position among the GCC countries in the lowest number of visitors?
6. Do you think tourism planning should only be the government's responsibility? Why? How far you think the private and local community should be involved and in which aspects (collaboration)? How do they overcome the overlapping?

Oman Tourism Marketing and Promotion:

1. What is the Ministry marketing strategy to promote Oman locally and internationally?
2. What are the methods or ways that the government has adopted in branding and promoting the Sultanate globally? How effective are they in enhancing Oman image and branding?

3. To what extent does tourism marketing for products and services (e.g., hotels, resorts, restaurants, shopping mall, etc.) match the visitor's demands and expectations? If Yes, how, If No, why?
4. What is the role of international offices around the world? How do they promote the Sultanate?

Oman Tourism Development:

1. In your opinion, why has the tourism sector's contribution to GDP been less than 3% for more than a decade, despite the huge investments and spendings?
2. To what extent, do you think, have tourism resources (natural and human-made) been appropriately exploited to support Oman's economy?
3. Do you agree that there is a lag/paucity in the development of the tourism sector? Why? In your opinion, what are the main causes of this slow development?
4. In your opinion, why does the tourism sector not meet expected projections of growth and significant numbers of tourists as per the national tourism strategy (vision 2020)?
5. In your opinion, what are the points of weaknesses in the development of the tourism sector?
6. What are the most challenging tasks that the Omani government should overcome to improve and develop the sector?

Tourism Impacts: Social, Environment (Ecology), and Economic Environments

1. What are the most positive tourism impacts on social, environment, and economic in Oman?
2. What are the most negative tourism impacts on social, environment, and economic in Oman?
3. How does the Omani government manage (overcoming or mitigating) those negative impacts?

Interview: Participant in the Private Sector (Tourism Businesses: Tour operators, Omran, ASAAS)

Private Sector Role in Oman Tourism Sector:

1. To what extent has, the private sector been involved in the development of the tourism sector?
2. How would you identify the partnership between the government and the tourism businesses?
3. To what extent do the tourism businesses contribute to and participate with the government in improving tourism products and services, conducting festivals, adding new attractions, setting policies and procedures?
4. Do you think that Oman is positioning itself properly in the tourism destination map? If not, what should be done?
5. Do you think Oman can compete with neighbouring countries such as UAE, Bahrain, and Qatar? If No, why, If Yes, How?
6. To what extent do you think adopting the "*selective tourist*" strategy in enhancing the economic sector contribution has been successful? What is the possibility of adopting another strategy?

Tourism Planning and Policies in Oman: The National Tourism Strategy (Vision 2040)

1. To what extent do you think the private sector has been involved in achieving the national tourism strategy (2040)?
2. In your opinion, what makes national tourism Vision 2040 different from the Vision 2020? How will the vision 2040 complete 2020?
3. What are the enablers and barriers to the success of Oman Tourism 2040?
4. In your opinion, how will the oil price crisis affect tourism businesses projects and investments?
5. What are the reasons that Oman is ranked in the fifth position among the GCC countries with the lowest number of visitors?

Tourism Marketing and Promotion in Oman:

1. To what extent do you think tourism businesses in the private sector are aware of the vision 2020 and 2040?
2. What is the Ministry marketing strategy doing to promote Oman locally and internationally?
3. From the private sector perspective, what are the methods or ways that the government has adopted in branding and promoting the Sultanate globally? How effective are they in enhancing Oman image and branding?
4. To what extent does tourism marketing for products and services (e.g., hotels, resorts, restaurants, shopping mall, etc.) match the visitor's demands and expectations? If not at all, Why, If Yes, how?
5. From the private sector perspective, how do international representation offices promote the Sultanate?

Tourism Development in Oman:

1. In your opinion, why has the tourism sector's contribution to GDP has been less than 3% for more than a decade, despite the huge investments and spendings?
2. To what extent, do you think, have tourism resources (natural and human-made) been appropriately exploited to support Oman's economy?
3. Do you agree that there is a slow (lag/paucity) in the development of the tourism sector? Why? In your opinion, what are the main causes of this slow development?
4. In your opinion, what are the reasons that the tourism sector has not met expected projections of growth and significant numbers of tourists as per the national tourism strategy (vision 2020)?
5. In your opinion, what are the points of weaknesses in the development of the tourism sector?

6. What are the most challenging tasks that the Omani government should overcome to improve and develop the sector?

B. Arabic: Government Officials and Tourism Business Managers, Interview Questions

موضوع الدراسة: التنمية السياحية وإدارة الوجهة السياحية ـ دراسة حالة سلطنة عمان

استمارة اجراء مقابلة مع موظفي القطاعين الحكومي والخاص

عزيزي المشارك!

اسمي علي عكعاك ، وأنا حالياً باحث دكتوراه، كلية إدارة الأعمال، في جامعة إكستر في المملكة المتحدة. الهدف من إجراء المقابلة هو تقييم تطور قطاع السياحة من منظور القطاعين العام والخاص (المؤسسات الحكومية والشركات الخاصة). إن مدة المقابلة ساعة ومن المحتمل تزيد عن ذلك، علماً بإن مشاركتك في هذه المقابلة اختيارية، ولن تكون هناك أي عواقب سلبية عليك، أو للشخص الذي دعاك لإجراء مقابلة معه إذا اخترت عدم المشاركة ويحق لك الانسحاب من المقابلة في أي وقت. ولضمان السرية في عدم الكشف عن اسمك أوهويتك ستيم التعامل مع التعليقات والردود بسرية تامة ولن تُنسب التعليقات المقدمة إليك باسمك أو دورك أو خصائصك. ومع ذلك ، لديك الحق في الحصول على تعليقات منسوبة إليك إذا كنت ترغب في ذلك.

هل يمكنني رجاء تسجيل هذه المقابلة في الشريط ، لأنها ستساعدني في تحليل بياناتي؟ إذا كانت الإجابة "**نعم**" ، فلا تتردد في الضغط على زر "**إيقاف التشغيل**" لمسجل الشريط في أي وقت أثناء المقابلة.

- ☐ أنا ، المشارك ، أكد أنه: تم إطلاعنا على هذا المشروع البحثي والغرض منه والموافقة على المشاركة.
- ☐ لقد ناقشت أي متطلبات لإخفاء الهوية أو السرية مع الباحث.
- ☐ أوافق على التسجيل الصوتي / تسجيل الفيديو أثناء المقابلة.

إذا كان لديك أسئلة أو استفسارات تتعلق بأي من القضايا التي أثيرت في المقابلة ، يرجى الاتصال بالباحث (998 + 9968) أو 9929 (عمان) أو 78495 24977 (0) (+44) (المملكة المتحدة) ، أو البريد الإلكتروني .(aa716@ exeter.ac.uk): يمكنك أيضًا الاتصال بالمشرف الإكاديمي، البروفسور غاريث شو (g.shaw@exeter.ac.uk) . إذا كان لديك أي أسئلة بخصوص حقوقك كمشارك في الأبحاث، يرجى الاتصال بكلية إدارة الأعمال، في جامعة إكستر على 722660 1392 (0) (+44) أو (**info.buildingone@exeter.ac.uk**).

قبل البدء بالمقابلة... هل لديك أي أسئلة أخرى بخصوص أهداف أو إجراء المقابلة؟

توقيع المشارك: ....

دليل المقابلة هذا ليس استبيانا لكنه يوفر إطارا للمقابلة.

الحالة رقم:	التاريخ:	وقت المقابلة: ....
اسم المؤسسة:	....	
نوع المؤسسة:	( ) عام ( ) خاص ( ) أخرى	
اسم المشارك:	....	
الوظيفة:	....	
المؤهل الأكاديمي:	الدبلوم، البكالوريوس، الماجستير، الدكتوراه: .... أخرى:	
سنوات ا عمل في القطاع السياحي	....	
الخلفية السابقة للمشارك:	....	
توقيع الباحث:	....	

مشارك في القطاع العام

(وزارة السياحة والجهات الحكومية الأخرى)

عمان كوجهة سياحية:

1. ما هي الأنشطة السياحية الرئيسية التي ينبغي على الحكومة العمانية التركيز عليها لتحقيق الرؤية الحالية لعام 2020 والرؤية المستقبلية 2040؟ لماذا تعتقد أن هذه الأنشطة مهمة؟
2. ما هي الإنجازات الرئيسية التي حققتها الحكومة العمانية في قطاع السياحة؟
3. هل تعتقد أن عمان تضع نفسها بشكل صحيح في الخريطة كوجهة السياحية؟ إذا لم يكن كذلك ، ما الذي ينبغي عمله؟
4. هل تعتقد أنه بإمكان عمان التنافس مع الدول المجاورة مثل الإمارات العربية المتحدة والبحرين وقطر؟ لماذا (اذا الجواب لا)، كيف (أذا كان الجواب نعم)؟
5. إلى أي مدى تعتقد أن نجاح اعتماد استراتيجية "السياحة الانتقائية" سيساهم في تعزيز مساهمة القطاع الاقتصادي؟ ما هي إمكانية اعتماد استراتيجية أخرى (علي سبيل المثال، كالاستثمار الانتقائي)؟

الحكومة كمنظمة لإدارة الوجهة السياحية:

1. ما هي استراتيجية الوزارة في إدارة قطاع السياحة؟
2. كيف تتحكم الحكومة في قطاع السياحة من ناحية التخطيط والإجراءات واللوائح ، وما إلى ذلك؟
3. ما هي استراتيجية الوزارة للتغلب على العقبات (التهديدات) التي تعوق استثمارات القطاع مثل عجز الموازنة الحكومية المرتفع الناجم عن أزمة أسعار النفط؟
4. كيف تتعاون الوزارة مع القطاع الخاص؟ ما هو نوع الدعم (الحوافز والتسهيلات) الذي تقدمه الوزارة لتشجيع الاستثمار في قطاع السياحة (محليًا ودوليًا) ؟
5. إلى أي مدى تعتقد أن هناك تعاوناً بين وزارة السياحة وغيرها من السلطات الحكومية مثل وزارة التراث والثقافة ، ووزارة البلديات ، فيما يتعلق بالتخطيط والتنفيذ، وتحسين المنتجات والخدمات السياحية ، والفعاليات والمهرجانات، إضافة المعالم الجديدة ، ووضع السياسات والإجراءات؟ كيف يتم التغلب على التداخل في الاختصاصات؟

تخطيط وسياسات السياحة العمانية: الاستراتيجية الوطنية للسياحة (رؤية 2040)

1. ما الذي يجعل رؤية الوطنية 2040 مختلفة عن رؤية 2020؟ كيف ستكمل الرؤية 2040 عام 2020؟
2. ما هي العوامل المساعدة في نجاح الخطة السياحية 2040 التحديات التي تحول دون ذلك؟
3. إلى أي مدى تؤثر أزمة أسعار النفط في تحقيق استراتيجية السياحة الوطنية 2040؟
4. ما هي الأسباب ، وراء ترتيب عمان في المركز الخامس بين دول مجلس التعاون الخليجي من ناحية عدد الزوار؟
5. هل تعتقد أن التخطيط السياحي يجب أن يكون فقط مسؤولية الحكومة؟ لماذا؟ إلى أي مدى تعتقد أنه ينبغي إشراك المجتمع المحلي والقطاع الخاص، وماهي جوانب التعاون؟ كيف يتم التغلب على التداخل ؟

تسويق وترويج السياحة العمانية:

1. ما هي استراتيجية وزارة السياحة التسويقية والترويجية في تعزيز عمان كوجهة سياحية محليا ودوليا؟
2. ما هي الطرق التي اعتمدتها الحكومة في ترويج السلطنة على مستوى العالم؟ ما مدى فعاليتها في تحسين صورة عمان وعلامتها التجارية؟
3. إلى أي مدى يتطابق التسويق السياحي للمنتجات والخدمات (مثل الفنادق والمنتجعات والمطاعم ومراكز التسوق وغيرها) مع متطلبات وتوقعات الزائرين؟ كيف (اذا كان الامر يتطابق)، لماذا (اذا كان الامر لا يتطابق)؟
4. ما هو دور مكاتب التمثيل الدولية ؟ كيف يتم الترويج للسياحة العمانية من خلال هذه المكاتب؟

تنمية السياحة العمانية:

1. ما الذي جعل مساهمة قطاع السياحة في الناتج المحلي الإجمالي أقل من 3٪ لأكثر من عقد من الزمن ، على الرغم من الاستثمارات الضخمة والإنفاق من قبل الحكومة العمانية؟
2. إلى أي مدى تعتقد أن الموارد السياحية (الطبيعية والأصطناعية) قد تم استغلالها بشكل مناسب لدعم القطاع السياحي؟
3. هل توافق على وجود تباطؤ في تطوير وتنمية قطاع السياحة؟ لماذا؟ ما هي الأسباب الرئيسية للبطء؟

4. ما هي الأسباب التي تجعل القطاع السياحي لا يفي بالتوقعات للنمو وأعداد كبيرة من السياح وفقاً لاستراتيجية السياحة الوطنية (رؤية 2020)؟
5. ما هي نقاط الضعف في تطوير وتنمية قطاع السياحة؟
6. ما هي أكثر الصعوبات (التحديات) التي يجب على الحكومة العمانية التغلب عليها لتحسين وتطوير القطاع؟

الآثار السياحية: الاجتماعية ، البيئة ، الاقتصادية

1. ما هي الآثار الإيجابية للسياحية على البيئة والمجتمع والاقتصاد في عمان؟
2. ما هي الآثار السلبية للسياحة على المجتمع والبيئة والاقتصاد في عمان؟
3. كيف تعمل الحكومة العمانية في التغلب على أو التخفيف من تلك الأثار السلبية؟

مشارك في القطاع الخاص
(المؤسسات الخاصة ذات العلاقة بالسياحة)

دور القطاع الخاص في قطاع السياحة:

1. إلى أي مدى ساهم القطاع الخاص في تطوير قطاع السياحة؟
2. كيف تحدد الشراكة بين الحكومة والشركات السياحية؟
3. إلى أي مدى تشارك الشركات السياحية مع الحكومة في تحسين المنتجات والخدمات السياحية، وإقامة المهرجانات، وإضافة المعالم الجديدة، ووضع السياسات والإجراءات؟
4. هل تعتقد أن عمان تضع نفسها بشكل صحيح في الخريطة كوجهة السياحية؟ إذا لم يكن كذلك ، ما الذي ينبغي عمله؟
5. هل تعتقد أنه بإمكان عمان التنافس مع الدول المجاورة مثل الإمارات العربية المتحدة والبحرين وقطر؟ لماذا (اذا الجواب لا)، كيف (أذا كان الجواب نعم)؟
6. إلى أي مدى تعتقد نجاح اعتماد استراتيجية "السياحة الانتقائية" في تعزيز مساهمة القطاع الاقتصادي؟ ما هي إمكانية اعتماد استراتيجية أخرى؟

تخطيط وسياسات السياحة العمانية: الاستراتيجية الوطنية للسياحة (رؤية 2040)

1. هل تعتقد أن القطاع الخاص شارك في تحقيق استراتيجية السياحة الوطنية (2040)؟
2. ما الذي يجعل رؤية السياحة الوطنية 2040 مختلفة عن رؤية 2020؟ كيف ستكمل الرؤية 2040 رؤية عام 2020؟
3. ما هي العوامل المساعدة في نجاح السياحة العمانية 2040 والموانع التي تحول دون ذلك؟
4. برأيك كيف ستؤثر أزمة أسعار النفط على مشاريع واستثمارات الشركات السياحية؟
5. ما هي الأسباب، وراء ترتيب عمان في المرتبة الخامسة بين دول مجلس التعاون الخليجي في أقل عدد من الزوار؟

تسويق وترويج السياحة العمانية:

1. ما مدى وعي المؤسسات السياحية في القطاع الخاص بالرؤية 2020 و 2040؟
2. ما هي استراتيجية وزارة السياحة في التسويق لتعزيز عمان محليا ودوليا؟
3. من وجهة نظر القطاع الخاص، ما هي الطرق التي اعتمدتها الحكومة في ترويج السلطنة على مستوى العالم؟ ما مدى فعاليتها في تحسين صورة عمان وعلامتها التجارية؟
4. إلى أي مدى يتطابق التسويق السياحي للمنتجات والخدمات (مثل الفنادق والمنتجعات والمطاعم ومراكز التسوق وغيرها) مع متطلبات وتوقعات الزائرين؟ كيف (اذا كان الامر يتطابق)، لماذا (اذا كان الامر لا يتطابق)؟
5. من وجهة نظر القطاع الخاص، كيف ساهمت مكاتب التمثيل الدولية في الترويج للسلطنة؟

تنمية السياحة العمانية:

1. برأيك ، ما الذي جعل مساهمة قطاع السياحة في الناتج المحلي الإجمالي أقل من 3٪ لأكثر من عقد من الزمن ، على الرغم من الاستثمارات الضخمة والإنفاق من قبل الحكومة العمانية؟
2. إلى أي مدى تعتقد أن الموارد السياحية (الطبيعية والأصطناعية) قد تم استغلالها بشكل مناسب لدعم اقتصاد السلطنة؟
3. هل توافق على وجود تباطؤ في تطوير قطاع السياحة؟ لماذا (اذا كان الجواب نعم)؟ ما هي الأسباب الرئيسية للبطء؟
4. ما هي الأسباب التي تجعل القطاع السياحي لا يفي بالتوقعات للنمو وأعداد كبيرة من السياح وفقاً لاستراتيجية السياحة الوطنية (رؤية 2020)؟
5. ما هي نقاط الضعف في تطوير قطاع السياحة برأيك؟
6. ما هي أكثر الصعوبات (التحديات) التي يجب على الحكومة العمانية التغلب عليها لتحسين وتطوير القطاع؟