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Australian tourist resorts

Abdulla Alhemoud
University of Wollongong

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AN ANALYSIS OF GCC DEMAND FOR TOURISM SERVICES WITH SPECIAL REFERENCE TO AUSTRALIAN TOURIST RESORTS

A Thesis Submitted in Fulfillment of the Requirements
for the Award of the Degree

DOCTOR OF PHILOSOPHY

from

The University of Wollongong
New South Wales
Australia

by

Abdulla Alhemoud
B.Sc., M.Sc.

DEPARTMENT OF MARKETING
2000

DECLARATION

I hereby certify that this thesis has not been submitted previously as part of the requirements of another degree and that it is the result of my own independent research.

Abdulla Alhemoud

ACKNOWLEDGEMENTS

I would like to express my profound thanks to my supervisors, Professors Mokhtar M. Metwally and Leslie A. White, whose guidance, penetrating comments; helpful criticism and constructive suggestions have been instrumental to the completion of this thesis. I highly appreciate the considerable time they spent on my work.

I also wish to record my sincere thanks and appreciation to the University of Wollongong, Department of Marketing and the Office of research for providing me with the Overseas Postgraduate Research Scholarship (OPRS). The scholarship indeed helped me carry out the tremendous costs incurred during this research study, without it this research would be almost impossible.

A sincere thanks to the government agencies in Kuwait, Saudi Arabia and the United Arab Emirates for their assistance during the time I spent there collecting research data. I also wish to thank the enormous support provided by the Gulf community who responded to my lengthy questionnaires.

A special thanks to the staff of the University of Wollongong Library, Sydney University library, and New South Wales University Library for assisting me locate research studies in the fields of Tourism, Marketing, and Economics.

Finally, I would like to express my special thanks to Dr. Edward Armstrong (University of Wisconsin-Stout, USA) whose advise and encouragement made me continue my education and pursue a Ph.D.

DEDICATION

I would like to dedicate this research study to the following persons:

My father, Dr. Mohammad Alhemoud, who treasures “*education*”.

My Mother, Mrs. Suhaila Ibrahim, who has the strongest will and patience for her children to continue education.

My wife, Abeer, for her continuous encouragement

My newborn daughter Julia who I hope would read this Thesis when she grows up.

(some men follow a path wherever they go, I go where there is no path and leave a trail).

ABSTRACT

Tourism is an increasingly important area of Service trade. Every foreign visitor who spends money in a tourist resort/destination contributes to an improvement in the balance of current account of the country to which this resort belongs. With the value of the Australian dollar declining, and given the vast natural resources and beauty offered by Australia, tourism services may well become a key Australian export factor.

The literature on marketing of tourism is still in an infant stage. This is because tourism, is a *composite* service offered by nationals to foreigners. The tourist is a very different customer to the national. In most cases, the tourist speaks a different language, adheres to a different religion, is grown up in a different culture, has different social values, comes from a place with different civilization and is used to different political and legal systems.

The GCC (Gulf Cooperation Council, consisting of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates) is a great potential market for the Australian tourist industry. However, very little is known about the demand of GCC consumers for tourism services and the attitudes of these consumers toward various tourist resorts/destinations. Moreover, it is important to know whether GCC consumers would be interested to spend their vacation in Australia and to determine the salient characteristics of those GCC consumers who express interest to do so. However, Australia, should plan effective marketing strategies to maximize the intake of GCC tourists.

This thesis is an *interdisciplinary* study that attempts to analyze the demand of GCC consumers for tourism services and the attitudes of GCC tourists toward various resorts/destinations. A special reference is given to GCC demand for Australian tourist resorts and the marketing strategies needed to maximize this demand.

The thesis analyzed the main determinants of aggregate GCC spending on tourism. This is done through development and testing of. Single and Simultaneous equation regression models. The econometric results suggest that GCC spending on tourism is subject to a partial adjustment mechanism with significant feedback effects.

A surveys was conducted by the researcher during the months of April and May 1999 to find out how the consumers of the GCC countries rate tourist resorts and determine the main demographic factors which may discriminate between those who expressed interest to visit Australia and those who did not. Three random samples, each has 385 members, were collected from three GCC capital cities. The descriptive statistics suggest that the GCC consumers evaluate tourist resorts on 20 criteria. The relative importance of the considered variables varies within each member state and between states. The survey results also suggest that there are differences in the demographic profiles of the various GCC countries, particularly household income and

family size.. Moreover, The survey results indicate that a significant proportion of GCC consumers consider Australia as a tourist resort.

The survey contained a large number of variables, most of which are correlated. The study attempted to examine the relationships among the interrelated variables and represent them in terms of a few underlying factors. This is done through the use of the technique of Factor Analysis. The principal component method, using varimax rotation, reduced the 20 explanatory variables, in each sample, to four factors. These were identified as “cost factor”; “attraction factor”; “convenience factor” and “image factor”.

Discriminant analysis was used to determine which, if any, of the four factors predict GCC consumers’ interest to visit Australian resorts to a statistically significant degree. The results suggest that GCC consumers who are interested in visiting Australia are motivated by the “image factor” while those who are not interested are held back by the “cost factor”.

Since the GCC citizens have a wide range of choices when it comes to selecting a tourist resort, it was important to identify resorts with similar attributes. This is done through the use of the Cluster Analysis. Multiple discriminant analysis was then used to describe the nature of the differences between clusters and to test these differences for significance. The results of the cluster analysis suggest that the 13 most popular tourist resorts visited by GCC residents can be grouped into four clusters based on five predictors: “Travelling Cost”; Living Expenses”, “Entertainment”; ”Comfort”; “Attractions and adventures”. Multiple Discriminant Analysis identified three discriminant functions. These functions suggest that GCC consumers, who visit the cluster of tourist resorts, which includes Australia, do so for attractions and adventures.

The statistical results of the thesis suggest that Australian National and State Tourist Bureaus should approach the job of attracting GCC tourists from a planning point of view. The study develops a tourism-marketing plan for Australian tourist resorts to achieve this goal. A model of perceived service quality is also developed and applied to the Australian hotel industry. Finally the study discussed the marketing-mix of the Australian tourist industry and offered some recommendations to maximize the number of GCC tourists.

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CHAPTER ONE

INTRODUCTION

Tourism is an increasingly important area of Service trade. Every foreign visitor who spends foreign currency in a tourist resort contributes to an improvement in the current account of the country to which this resort belongs. With the value of the Australian dollar declining, and given the vast natural resources and beauty offered by Australia, tourism services may well become a key Australian export factor.

Tourism is bought and sold both formally and informally by industry, consumers and governments. Governments often sell tourism through promotional efforts designed to build demand for travel to a particular country. Industrial groups purchase tourism as a means of bringing personnel together for meetings and conferences. They may also sell tourism for particular areas. And, most importantly, individuals travel both alone and in groups, and spend money on tourist services

The GCC (Gulf Cooperation Council, consisting of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates) is a great potential market for the Australian tourist industry. Consumers of the GCC value very much their family vacation and tend to have a strong demand for tourism services. These consumers enjoy very high standard of living. They prefer to spend every vacation overseas because domestic tourist resorts are either not existent or very underdeveloped. Also, summer in all GCC states is extremely hot. As a result, most residents seek resorts of mild weather to spend their

vacation. Moreover, the GCC nationals are in continuous contact with foreigners of different nationalities. The interaction with foreign cultures has a strong influence on GCC Consumers attitudes towards traveling. Furthermore, the relatively restrictive culture and social environment in the GCC countries motivate many citizens to seek a more liberal atmosphere during their vacations. In addition, some GCC citizens go overseas during their vacation to establish business contacts, enter into some transactions, receive education or simply strike some shopping bargain

1-1 The Problem:

Most writers on tourism marketing concentrated on the supply side. Very few marketing researchers considered the demand side. However, it is generally recognized that before the marketing discipline can make its full contribution to tourism, a number of the theoretical and conceptual problems, resulting from the lack of marketing orientation in traditional tourism research, must be tackled. It is also believed that the degree of success in attracting international tourists lies in understanding how these tourists evaluate prospective resorts.

This thesis is an **interdisciplinary** study that attempts to make a (very) modest contribution towards filling the gap in the literature on marketing tourism through a study of the demand side of the consumers of the rich oil producers who are members of the GCC.

Very little is known about the determinants of aggregate GCC spending on tourism and there is hardly any information about how GCC consumers evaluate tourist resorts. Moreover, it is not clear how the consumers of the various GCC countries differ in terms of their preference ratings of different variables affecting their decision to visit a particular resort. Furthermore, no previous attempt was made to find out whether GCC consumers would be interested to spend their vacation in Australia and to determine the salient characteristics of those GCC consumers who express interest to do so. And since the GCC consumers have a wide range of choices when it comes to selecting a tourist resort, it would be useful, when planning an effective marketing strategy, to find out if it was possible to cluster the most popular resorts visited by the GCC consumers.

1.2 Previous Research

Most writers on tourism marketing concentrated on the supply side. Wheeler (1005) discussed the nature of tourism and the paradoxes that occur with its development along with the role that ethics can play in the marketing of tourism products. Stipanuk (1989) saw the need for hospitality-education programs to enhance the activities of the tourist industry.

Tourism marketing images have occupied the attention of most marketing researchers. Mayo (1975) determined the image of a destination as a critical factor in a destination choice process. Shibutani (1967) argues that an image constitutes the matrix through which one perceives his/her environment.

Some country studies concentrated on the special features and unique offering of the particular resort. Vanlimburg (1998) analyzed the attributes of Hertogenbosch City of the Netherlands and found the jazz festival, the presence of Cathedral and world class restaurants significantly contribute to the perceptions of the city. Chetwyn (1998) observed that London might be a vibrant centre for fashion, arts, finance and culture. Julesrosette (1994) believes that, from the 1920's onwards, Paris was seen by Black American elites as a locus for artistic freedom and expansion. Morrison et.al (1994) hypothesized that the availability of a smoke-free environment is perceived by many tourists from the major English-speaking countries to be an important facet of the hospitality product. Tucker, Seow and Sundberg (1983) and Yucker and Sundberg (1988)) studied services in ASEAN-Australian trade and concluded that tourism services have the greatest growth potential for the Australian economy.

Very few marketing researchers considered the *demand* side of marketing tourism. Perhaps the most noticeable work in this area is that by Luzer et.al (1998) which used multi-nominal logit analysis to evaluate decisions to participate in eco-tourism. The empirical results supported the hypothesis that upper-income tourists do not select the particular resort while family size and proximity to the resort have a positive influence. It is this type of research, especially that related to the rich Gulf consumers, which is lacking in the literature.

Very little is known about the attitudes of the GCC consumers toward various tourist resorts. In particular, empirical work is needed to find out the

main determinants of aggregate GCC spending on tourism. Also, marketing research is required to find out how GCC consumers evaluate tourist resorts. Moreover, it is important to know whether GCC consumers would be interested to spend their vacation in Australia and to determine the salient characteristics of those GCC consumers who express interest to do so. Furthermore, if Australia were to plan effective marketing strategies to attract GCC tourists, a comparison between Australia and other resorts, using relevant attributes would be needed.

1.3 Objectives of the Study

This thesis tries to offer an in-depth analysis of the *demand* side of marketing tourism as related to the GCC consumers. In particular, this study aims to:

1. Determine the main variables influencing the aggregate demand for tourism by the members of the GCC.
2. Examine the interaction between the GCC economies and the rest of the world in determining GCC demand for tourism and test if there are significant feedback effects to tourist spending by the GCC
3. Find out how GCC consumers evaluate various tourist resorts, examine the relationships among the interrelated variables and represent them in terms of a few underlying factors
4. Examine if the consumers of various GCC countries differ in terms of their preference ratings of different variables.

5. Test if there are differences in the demographic profiles of the various GCC countries; which may affect their consumers' attitudes toward tourist resorts
6. Find out how the consumers who expressed interest to visit Australia differ in their demographic profile, attitude towards travelling from those who are not interested.
7. Cluster tourist resorts visited by GCC consumers that have similar attributes, describe the nature of the differences between clusters and to test these differences for significance.
8. Identify marketing strategies that can be applied by Australian Tourist Bureaus to maximize the number of GCC visitors

1.4. Hypotheses of the Study

This thesis is based on a number of hypotheses:

- (i) GCC consumers have a wide range of choice when selecting a tourist resort. There are no restrictions.
- (ii) The GCC citizens speak the same language, adhere to the same religion, have a very similar social way of life, and share similar traditions and civilizations. There are, however, some demographic differences between citizens of the GCC, particularly, average income, family size, level of education and occupational distribution
- (iii) Since members of the GCC are open economies, the economic interaction of these economies and the rest of the world can affect spending on tourism by GCC consumers.

- (iv) A large number of variables, most of which are correlated, affect GCC attitudes towards various tourist resorts. It is possible to examine the relationships among the interrelated variables and represent them in terms of a few underlying factors.
- (v) It is possible to discriminate between those GCC consumers who express interest to visit Australia and those who do not using the extracted factors which represent the variables determining those consumers' attitudes toward various tourist resorts.
- (vi) Tourist resorts visited by GCC consumers and have similar attributes can be clustered together. The nature of the differences between clusters can be examined and tested for significance.
- (vii) Effective marketing strategies can be drawn to maximize the number of GCC tourists visiting Australia.

1.5. Methodology

This study uses the quantitative approach in achieving its objectives.

In particular:

- (i) The study develops and tests single and simultaneous regression models to find out the main determinants of aggregate demand for tourism by GCC countries, examine the impact of the interaction between the GCC economies and the rest of the world on this demand and test for feedback effects.
- (ii) Two-group Discriminant analysis was used to determine which, if any, of the extracted factors predict GCC consumers' interest

to visit Australian resorts to a statistically significant degree. The two-group discriminant analysis is also used to separate the two groups of GCC consumers (those interested to visit Australia as a tourist resort and those who are not) on the basis of some demographic variables, attitude towards travel and importance of family vacation.

(iii) The study uses factor analysis to examine the relationships among the interrelated variables and represent them in terms of a few underlying factors. The principal component method, using varimax rotation, reduced the 20 explanatory variables, in each sample, to four factors.

(iv) The study uses cluster analysis to identify resorts, visited by GCC consumers, with similar attributes. Agglomerative hierarchical cluster analysis, using Ward's method and the squared Euclidean distances was applied to the most popular resorts visited by GCC consumers in 1998.

(v) Multiple discriminant analysis was used to describe the nature of the differences between resort clusters and to test these differences for significance.

It must, however, be emphasized that this study is an inter-disciplinary research. It cuts across economic, and marketing disciplines, and should therefore, be assessed accordingly.

1.6. Plan of the Study

This study is divided into nine chapters. After this introduction, Chapter two reviews the literature on tourism marketing in the contemporary world. After a brief introduction in section one, the growing interest in tourism marketing is discussed in section two. A review of general studies in tourism marketing is given in section three. Section four examines tourism marketing images. Some methodologies used in tourism marketing are discussed in section five. Individual country studies on tourism marketing are reviewed in section six. Finally, section seven offers a brief review of tourism marketing related to Australia.

Chapter three analyzes the main determinants of aggregate GCC spending on tourism. Regression analysis has been used for this purpose. The chapter is divided into three sections. Section one develops and tests a single-equation model of GCC demand for tourism. Section two tests the hypothesis that there is a feedback effect in the demand relationship. A simultaneous-equations model is developed and tested. The main conclusions of the chapter are summarized in section three.

Chapter four presents the results of a survey conducted by the Researcher in three Gulf cities, namely Kuwait, Riyadh and Dubai. A random sample of size 385 was selected from each city. The GCC consumers evaluated tourist resorts on 20 criteria. These criteria are 1 traveling expenses; 2 Tourist packages, 3. Natural scenes, 4 Unique features, 5. Family attractions, 6 The Weather, 7 Cost of accommodation, 8 Cost of living at resort, 9 Children attractions, 10 Night entertainment, 11 Knowledge of

places to visit and see, 12 Shopping bargains, 13 Recommendations of relatives and friends, 14 Prior information about the resort, 15 Communications with nationals; 16 Internal transport facilities and cost, 17 Service standards, 18 Medical facilities at the resort, 19 Adventures and 20. Memories to bring back home.

The Gulf tourists were also asked to rate the tourist resorts they visited in 1998 over five attributes on a 7-point scale.

Chapter five uses the survey results of the previous chapter to find out how GCC consumers evaluate tourist resorts. The survey contained a large number of variables, most of which are correlated. This chapter tries to examine the relationships among the inter-related variables and represent them in terms of a few underlying factors. This is done through the use of the technique of Factor Analysis. The Chapter is divided into four sections. Section one outlines the relevant variables contained in the survey. Section two briefly reviews the technique of factor analysis. Section three gives the main results of the factor model for each of the sample countries. Finally, section four summarizes the main conclusions of the chapter.

Chapter six conducts a two-group discriminant analysis to determine which, if any, of the four factors extracted in the previous chapter predict GCC consumers' interest to visit Australian resorts to a statistically significant degree. Four factor scores are calculated for each respondent. The factor scores are then used as explanatory variables in discriminant analysis. This chapter also uses discriminant analysis to determine the salient characteristics of GCC consumers that expressed interest to visit Australia as

a tourist resort using the survey data for the three samples covering Kuwait, Saudi Arabia and the United Arab Emirates. Chapter six is divided into four sections. Section one briefly reviews the methodology. discriminant analysis, using factor scores as explanatory variables, is conducted in section two. Section three attempts to find out how the GCC consumers who expressed interest to visit Australia differ in their demographic profile from those who are not interested. Finally, section four summarizes the main conclusions of the chapter.

Chapter seven attempts to cluster tourist resorts visited by the GCC consumers on basis of a number of attributes. This chapter also tries to describe the nature of the differences between clusters and test these differences for significance. The Chapter is divided into four sections. Section one identifies the major tourist resort visited by the GCC consumers in 1998. Section two outlines briefly the technique of cluster analysis. The clustering of the tourist resorts is done in section three. Multiple discriminant analysis is used in section four to describe the nature of the differences between clusters and to test these differences for significance. Finally, Section five summarizes the main conclusions of the chapter.

Chapter eight uses the statistical results of previous chapters in assisting the Australian tourist industry draw effective marketing strategies to maximize the intake of GCC tourists. The chapter is divided into five sections. Section two outlines a tourist-marketing plan that can be used by the Australian Federal and State Tourist Bureaus in dealing with GCC potential consumers. Section three develops a model of perceived service

quality and applies it to Australian hotels accommodating potential GCC tourists. Section four examines the marketing-mix of Australian tourist bureaus directed to GCC consumers. Finally, section four summarizes the main conclusions of the chapter.

Chapter nine summarizes the main conclusions of the research. The thesis offers a bibliography for reference by future researchers.

CHAPTER TWO

TOURISM MARKETING IN THE CONTEMPORARY WORLD: A REVIEW OF THE RECENT LITERATURE

2.1 Introduction

The objective of this chapter is to critically review the recent literature in the area of tourism marketing. A comprehensive range of journal articles, books and reports are covered in the study.

This review focuses on a number of broad areas in tourism marketing. These include interest in tourism marketing, general studies in tourism marketing, tourism marketing images, methodology used in tourism marketing, individual country studies on tourism marketing and tourism marketing related to Australia.

2.2. Interest in Tourism Marketing

Dellaert et al, (1998) introduced a first step towards analyzing tourist travel choice in situations where: (a) tourists may temporarily separate their choice of different components of the travel package. For example, tourists may choose travel destinations before accommodation. (b) tourists face a structure of constraints that limit their choice options, e.g. tourists may be restricted by school holidays when choosing the period in which to travel. It was suggested that

tourism marketers should pay maximum attention to the school holiday periods in different countries and regions when promoting tourism and its products.

Zalatan (1998) looked at wives' involvement in the tourism decision-making process. Wives were asked to assign a score to their level of involvement with different categories of tourism related decisions. A high involvement was observed in decisions related to shopping, selecting restaurants, collecting information and preparing luggage while a marginal involvement prevailed in the financing aspects of travel. The research points out the importance of segmenting tourism market and targeting wives in the relevant tourism promotion activities.

Hanna et al (1997) , presented the lessons learnt from the development of a prototype tourism information service using the world-wide web. The study suggested that marketing efforts should concentrate on the following two aspects: page design and information content.

Richard et al (1994), believe that guests evaluate both the outcome and the process of service delivery of lodging firms to make repeat choice intentions. Service quality does appear important for explaining lodging choice intentions. Results of this study indicate that no one dimension of service quality captures the complexity of repeat choice intentions but several outcomes and process quality dimensions are important. In other words, the guests evaluate several dimensions when making lodging choices. The paper suggests that lodging firms may wish to emphasize multiple dimensions when marketing their services to attract tourists.

Travel arrangements are traditionally divided into package and non-package travel. Morrison et al (1994) suggested that marketing programs can be developed by expanding the concept of travel arrangements into three groups: independent travel, escorted tours and non-escorted packages. In this study, a multistage segmentation approach, involving the use of graphic, purpose of trip and travel arrangement criteria, was used to compare international pleasure travelers from France, Germany and the UK. The results provide a comparative profile of international travelers in the proposed three arrangement groups from these European countries in terms of their socio-demographics, travel characteristics, holiday activity participation and psycho-graphics which could serve as a basis for future marketing and promotion activities.

Fotti (1995) explored the role of the World Tourism Organization. American based Africa Travel Association and Kenya International Tourism Exhibition in the area of tourism marketing cooperation at eastern and northern African regions. It was found that these organizations call for greater cooperation in coordinating international campaigns and plan a greater share of the world tourism market.

Wheeler (1995) discussed the nature of tourism products and the paradoxes, which occur with its development along with the role that ethics can play in the marketing of tourism products. Green tourism, which is a focus for ethical considerations in the tourism industry, is analyzed. The researchers concluded that ethics are implicit in tourism marketing and revolve around effective segmentation, communication of appropriate destinations messages and

realizing the fragility of environment. This research, however, argues that tourism marketing must turn to an explicit debate if the longevity of the tourism resources is to be retained.

Krohn et al (1991) discussed the need for developing an ethical code of marketing of international tourism services. They advanced the thoughts that the development of an international tourism code of ethical behavior will help ensure that the marketing of tourism services and products meets or exceeds the widely accepted industry standards and practices. The development, promulgation and acceptance of such a code would require organizations such as the World Tourism Organization and pertinent United Nations agencies to adopt it, ensure compliance and enforce sanctions. The study suggested five axioms in developing an international code of ethical behavior: 1. The code should be short and simple. 2. All participants in the international tourism industry should be involved. 3. An effective communication and feedback channel should be established. 4. A seal of approval should be established for the industry along with individual practitioner certification, 5. Self-policing of advertising and promotion must be accomplished by those within the industry.

Stipanuk (1989), indicated that an increasing number of hospitality firms are employing marketing and risk managers. However, few hospitality-education programs directly address the activities and functions of these fields. Stipanuk suggested yhat a course on marketing and risk management should offer an opportunity to integrate and supply numerous aspects of the overall curriculum including organizational management, human resource management, financial

management, food and beverage management, tourism marketing, properties management, law, quantitative methods and communications.

Other contributors in this area, include Schmidt et al (1977), Gersh (1986), Krohn (1987), Meyers (1987), Gunn (1988,)Ollendorf (1988), Lewis et al (1989) and Shaw (1992)

2.3: General Studies in Tourism Marketing

March (1994) observed that though the marketing discipline offers tourism a variety of strategic tools and conceptual insights, an examination of the tourism literature suggests that marketing's contribution to tourism has been undervalued or misrepresented by tourism policy makers and practitioners alike. This situation has led to a general misunderstanding about the nature and value of marketing in the tourism industry. The researcher thinks that before the marketing discipline can make 'its full contribution to tourism, however, a number of theoretical and conceptual problems, resulting from the lack of marketing orientation in traditional tourism research, must be tackled. The study requests policy makers and practitioners to explore the marketing discipline to see what it can offer for tourism marketing and promotion.

Thanopoulos et al. (1988) studied the ethnicity and its relevance to marketing. He examined Greek-Americans through the use of a formal empirical study to identify demographic and ethnic variables influencing travel to Greece. The Greek-Americans were divided into three groups: Greek-born, American born

and Greek ethnics migrating from a country other than Greece. The study found that 10 variables significantly relate to the propensity to visit Greece. These include being first generation American or born in Greece, speaking Greek fluently, corresponding with Greece regularly, subscribing to Greek publications, participating in Greek folk societies, having lower levels of education, listening to a Greek radio station, participating in a Greek-related nationwide association and Greek Orthodox Church membership. Variables such as age, sex and income did not affect travel preference to Greece. The study suggests that future research may determine whether other ethnic groups behave in ways analogous to the Greek sample in the relevant areas of tourism marketing and promotion.

Balaz *et. al.* (1998) found that -a rapidly growing Central European trade with distant countries including Japan is an indication that Japan has increasingly been incorporated into the European tourism markets. This research based on marketing surveys and statistical data from national and international sources suggests that there is a considerable potential for marketing congress tourism, cultural and incentive travel to Japanese tourists. More vigorous marketing and policy development can help remove some of the basic obstacles such as low awareness of the Central European countries by the Japanese tourists and visa barriers between these countries.

Berry *et al.* (1997) tried to gain an insight into the perception of sustainable tourism and its marketing to potential tourists. Using a case study of East Sussex in the UK, the research explores how the general principle of sustainable tourism and its marketing at the macro level can be translated into workable practice by small

businesses. Three main themes are explored. First, how well the concept of sustainability and marketing understood by small businesses engaged in tourism. Second, how these sustainable concepts can be translated into workable practices and finally, the major barriers to implementing sustainable tourism and marketing by small businesses. The research revealed that despite willingness on the part of small businesses to engage in sustainable activities, these businesses have little understanding of the concept of sustainability. The study concluded that the cynical attitudes of small tourist operators towards government policies and their implementation are significant barriers to the implementation of sustainable tourism practices and marketing at the regional level in the UK.

The importance of Total Quality Management (TQM) has been recognized in Western Europe for a number of years since its earlier origins in Japan. Indeed, it has had an impact in a significant number of manufacturing organizations with some notable successes. To Witt et al. (1994), the key differences between manufacturing and services sectors provide the basis for establishing how well the various TQM models cope with these idiosyncrasies. Finally an assessment of the effectiveness of different TQM applications in tourism management and marketing was made to develop a composite picture of the steps which must be taken if TQM is to be successful in tourism industry. These steps will assist organizations in tourism-related areas in adopting TQM, facilitating the implementation process and reducing the likelihood of failure.

To promote the employment opportunities in tourism sector, Cukeir (1994) explored the informal employment opportunities by interviewing beach and street

vendors in Kuta and Sanur, two major resort areas in Bali, Indonesia. Aspects of demographics and job characteristics, language skills, income and job satisfaction were addressed in the interview. Among the other findings, it is demonstrated that the majority of the vendors in both the areas are teenagers or young adults, male and single. They usually are not Balinese but are migrants from elsewhere in Indonesia. Many vendors view their current employment, as a means of acquiring the skills required to gain access to employment in the formal sector. These findings could be used by Indonesian tourism authorities to promote employment of young people in Bali tourism areas.

In an interview, Chang Se-Hwa (1998), the executive director of overseas marketing department at the Korea National Tourism Organization (KNTTO), described the KNTTO's efforts to attract international tourists. Global promotion and making the nation more tourist friendly are the main steps towards marketing national tourism in the World market.

Gee (1986) observed that international tourists are more inclined to visit a destination where they believe the hosts to be friendly and courteous. Tourist destinations rely heavily on the use and development of positive human relations and perceptions. A major objective of tourism marketing and promotion, according to Gee, should be to reinforce or build a strong bond and courteous relations with tourists.

There are some other important studies done on the general issues in tourism marketing. One may mention those carried out by Roman (1969), Heil (1986),

Goodal (1990), Bitner *et al.* (1982), Gladwell (1989), Michie *et al.* (1990), Loker *et al.* (1992), Morrison, (1989) and Church (1988).

2.4. TOURISM MARKETING IMAGES

Boulding (1956) theorized human behavior based on the concept of image and its impacts on tourism marketing. The theory says that human behavior is primarily affected by image of things. Individuals are assumed to behave in accordance with what they know what they think they know and what they think they ought to know. Peoples' images are influenced by the quality and amount of information available to them. This has profound implications for marketing tourism products.

Mayo (1975) determined the image of a destination area as a critical factor in a destination choice process. He further indicated that a tourist evaluates all alternative destination area images simultaneously, and the one, which is close to some psychological idea and knowledge, is selected.

Gunn (1989) suggested that a destination can do little about changing its organic image but can Influence the change of an induced image to a large extent through promotional and publicity efforts. The end goal of image building should, therefore, aim at promoting the modification of an induced image.

Gartner *et al.* (1986) found that advertising of course plays a key role in image enhancement. Positive images can be developed through astute advertising of the unique and diverse tourism attractions of a given destination.

Reynolds (1965) found that tourists are likely to perceive many images of their destinations and these images in turn influence their behavior, attitudes, values and beliefs as consumers. They develop images of everything that they come into contact at a destination.

Dadgostar *et al.* (1992) studied the factors affecting time spent by tourists at a near city destination. They found that destination image, distance, family income, perceived expensiveness and age to be influential factors on near-home travel. Tourism marketers can use this information in their promotion efforts.

Shibutani (1967) argued that an image constitutes the matrix through which one perceives his/her environment. Tourists' perceptions as consumers are generally influenced their moods or frames of minds, their personalities and motivations, the social and physical context of the stimuli being perceived and the physical composition of the stimuli. Thus, tourists' perceptions of products and advertisements are a function of many factors.

Some other interesting references in this field include Phelps (1986), Perry (1978), McLellan (1983), Hunt (1975), Wee (1985), Dilley (1986), Goodrich (1978), Hunt (1975), Chon (1989), Gartner (1993) and Boorstin (1961).

2.5. METHODOLOGY USED IN TOURISM MARKETING

Lieux *et al.* (1992) conducted a survey of individuals over 55 in the United States. Questions were asked about the reasons for choosing a pleasure destination and lodging preferences. The survey identified three clusters: novelty seekers, active enthusiasts and reluctant tourists. Only active enthusiasts could be readily interpreted in terms of tourism motivation. This group participated in many activities with enthusiasm. Novelty seekers and reluctant tourists were less easily interpreted by their travel reasons using multiple discriminant analysis. There were significant differences in lodging preferences among the groups.

Ltizer *et al.* (1998) finds that eco-tourism or nature-based tourism is rapidly expanding area in the US tourism travel sector and marketing can enhance it further. States with a well-established urban-based tourism industry, such as Louisiana, may have opportunities through development of complementary nature-based tourism. The paper used multinomial logit analysis to evaluate decisions to participate in eco-tourism in Louisiana tourism including eco-tourism. The empirical results support the hypothesis that upper-income tourists do not select Louisiana as a green tourism destination while family size and proximity to Louisiana positively influence the decision to participate in Louisiana eco-tourism. This study has profound implications for marketing Louisiana tourism to the American tourists.

Khan *et al.* (1988) examined the researches done in the US tourism and tourism marketing. They overviewed the state of research being conducted in the hospitality programs in the US via a survey of US hospitality scholars. Six-page

questionnaires were mailed to administrators who were responsible for hospitality departments that have graduate programs and to individuals chosen for their established record of research output. A total of 38 responses were obtained. The survey indicates that the field is interdisciplinary. The most obvious disciplines involved include marketing, tourism planning, travel, personnel administration, food-service management and accounting.

Other references on the methodology used in tourism marketing which includes Claxton (1987), Calantone *et al.* (1989), Crampon *et al.* (1973), Crouch *et al.* (1990), Fotheringham (1983), Green *et al.* (1990), Hughes (1971), Assael (1968), Cooper (1992), Uzzell (1984), Greenacre (1984), Burke *et al.* (1989), McKercher (1995), Gartner (1989) and Morely (1991).

2.6. INDIVIDUAL COUNTRY STUDIES ON TOURISM MARKETING

Brewton *et al.* (1998) surveyed the tourism policies of 24 nations and found that these nations have some 13 categories of tourism policies. While no nation's policy contained all 13 elements, the US' policy explicitly involves only 3: marketing the destination, encouraging private sector involvement and keeping tourism related statistics. The tourism marketing policies of the US are mostly developed and executed by the state and municipality governments.

Footitt (1995) wrote about The World Travel Market Conference held at London in November 1994 focusing on the marketing policies of the Tanzanian Tourism Board. The researcher found that the Board aggressively markets the

Tanzanian original culture and its unspoilt natural environment. The Board also totally opposes mass tourism developments at the expense of the local culture and environment.

Gilbert (1992) observed that Spain is increasingly promoting new tourism themes and concepts. The two main marketing themes for 1993 were the Green Spain theme and the Camino di Santiago Campaigns. The objectives of the Spanish tourism development and marketing are divided into three: economic, social and environment. An action program has been developed for marketing all priority amenities available in the country including wine and gastronomy, special interest tourism, cultural tourism, mountain tourism, health tourism, conferences and meetings facilities.

Bramwell et. al (1994) examined the types and mix of organizations involved in city marketing for tourism in five old industrial cities in Britain (Birmingham, Bradford, Manchester, Sheffield and Stoke-on-Trent). Two trends in the tourism marketing organizations in these cities are identified namely, the increasing use of public-private sector partnerships and a recent trend towards corporate city marketing. The objectives behind the tourism marketing activities by the five cities were found to be very similar, although some differences were evident.

Vanlimburg (1998) analyzed the attributes of Hertogenbosch City of the Netherlands for marketing purposes. Three attributes are found to be significantly

contributing to the perceptions of the city. These are jazz festivals, the presence of Cathedral and World class restaurants.

Abdulla, M.A. *et al.* (1996) observed that The State of Kuwait has become well known since the Persian Gulf War. The country has tourism potential because of the international awareness arising from that conflict. The study compares the image of Kuwaiti tourism sights as perceived by Kuwaiti University students and English- speaking foreigners living in Kuwait in order to develop further strategies for tourism marketing. The findings show that the sample groups have different perceptions of tourism attractions and that neither group is very impressed with the tourism attractions in the country.

Chetwyn (1998) observed that London may be a vibrant center for fashion, the arts, finance, history and culture but when it comes to marketing the city as a conference and incentive destination, the efforts have been risible. The city badly needs leadership in this respect, a single voice with a sense of vision and purpose for London, and the clout to implement that vision. The London Tourism Board and Convention Bureau should be much more pro-active, introducing initiatives sadly lacking in the past including a dedicated marketing plan for London as a conference and incentive destination.

Getz *et al.* pointed out that Convention and Visitors Bureaux (CVBs) are primarily destination marketing organizations, established to fostering meetings and leisure travel in London. Although 'many of these organizations do not get involved in destination planning or product development, some bureaus have been

pro-active on the supply side. Their potential roles and strategies in these areas, however, are somewhat controversial in the Canadian tourism industry. Through a survey of Canadian CVBs, the authors revealed a profile of bureaus' involvement on the supply side of the destination markets. It is found that there are substantial barriers to CVB involvement in product development, but facilitating or producing events is popular with bureaus in Canada.

Julesrosette (1994) believed that from the 1920s onwards, Paris was seen by Black American elites as a locus for artistic freedom and expansion. Black American Paris contains a collection of touristic sights and experiences that are grafted onto the rest of American expatriate Paris. This Black Paris is a strong element of the touristic attractions in Paris which, the paper suggests, could be used to attract ethnic travellers to this country.

Andersen *et al.* (1997) considered that central to destination marketing is the image which potential tourists hold of a destination and its competitors. Andersen's paper considers the image of Denmark held by visitors to its fine art exhibitions and cultural tourism. The study concluded that destination promotion should consider market segmentation on the basis of experiences to be gained and not to assume implicitly that existing images are solely appropriate for tourism promotion and marketing.

Ashworth *et al.* (1994) researched on the marketing of tourism places in the city of Groningen, the Netherlands. They posed several questions: What is tourism place product? Who produces it? Who consumes it? What is the nature* of the market? How it is marketed? Two main conclusions emerged from this set of

questions: 1. Tourism place products are a distinct type of product. 2. Tourism place marketing is necessarily a distinctive form of marketing.

Johnson (1997) examined some recent adjustments in Hungary's hotel sector in the context of the country's changing political economy, its broadening external relationships and trends in the wider tourism environment. The paper suggested cooperation to promote tourism programs and the provision of good quality accommodation at reasonable cost and the promotion of tourism in the domestic market in addition to international market.

Carter (1998) examined the ways in which international leisure and business travelers use beliefs and ideas about regions in constructing perceptions on places as either safe or risky to visit. This research draws on in-depth interviews with international travelers and a close reading of travel advice in popular guidebooks. Three perceptions were found about places in general: Europe and North America were perceived as safe; Africa was seen as dangerous and to be avoided; and finally Asia was perceived as simultaneously risky but also exotic and worth experiencing. These findings have important implications on international tourism marketing.

Hammes (1994) used time series profile from 1965 to 1990 in examining the impact of large-scale resort development and subsequent promotions on the real wages and real land prices in the Big Island of Hawaii, USA. It was found that the wages of labor did not rise in the face of rapid and large-scale development. Land prices responded only weakly to this scale of development. Land prices,

however, appreciate more rapidly the closer the land in question is to the resort developments. For labor, the results indicate an elastic supply of labor to this market. For land, this study indicates that development of this type has only a limited impact on land prices. The study suggests that more aggressive marketing should be undertaken to generate more business in the area that would have positive impact on wages and land prices.

Harrison (1994) found that international tourism is often alleged to cause or exacerbates female prostitution. Tourism in Swaziland is believed to be based on the export of vice. Prostitution, however, was considered a problem in Swaziland decades before the tourist industry was developed and juvenile immorality was investigated in two important reports in 1956 and 1970. Prostitution was primarily associated with the migrant labor to mining areas, growth of cash economy and development of urban centers. As tourism industry developed, prostitution shifted from mining areas to hotels and tourists of different types became clients. The findings of this research show that there is little evidence that Swaziland's tourism industry promoted prostitution to attract tourists or it is based on prostitution of any kind.

Esichaikul et al. (1998) examined the case for government involvement in human resource development in the hotel industry and tourism marketing in developing countries with special reference to the hotel sector in Thailand. The outcome of the study suggests that government involvement in human resource development in Thailand is essential because of the absence of a developed and education-conscious private sector. The government is widely perceived to have

responsibility to undertake a supportive role to ensure that basic tourism education and training activities are initiated in the country. Without strong support by the government and commitment and co-operation from the industry, the development of human resources in the hotel and tourism marketing areas would be insufficient in Thailand.

Callan et al. (1997) observed that classification and quality grading schemes operated by the English Tourism Board and English Automobile Association have been extended in recent years to acknowledge the growth of motorway lodges throughout the country. The Callan's study attempted to evaluate the effectiveness of these schemes and aims to determine if their criteria measure the customers' expectations. Using the critical incident technique and in-depth interviews, the expectations of lodge customers were identified and compared and contrasted with the perceptions of the managers. After comparing these findings to classification criteria, the study suggested that these schemes are less effective in measuring the customer expectations. A number of discrepancies are identified, signifying that schemes and service providers fail to recognize additional expectations held by customers. The paper concluded that there is a need to revise the criteria in order to reflect these expectations and conduct promotional campaign to elevate customer awareness about the quality of services in the tourism industry.

Bamett (1997) traced the development of tourism in New Zealand with a focus on Maori (an ethnic group in New Zealand) involvement. He then addressed the question of marketing; sectoral control and the management of Maori tourism

along with its role in commoditisation of Maori culture. A high degree of care was suggested to preserve the originality of the culture.

Vanlimburg (1997) presented an analysis of tourists flows to Amsterdam and introduced an operational technique for the planning of the city's marketing. An empirical model was developed to aid planning at a local level and estimated and tested. Using the model the study then presented an analysis of overnight tourism to the city of Amsterdam for the period 1982-1993. Additionally an input/output analysis was undertaken and a number of trends were demonstrated and commented upon in the areas of tourism marketing.

Palmer (1994) researched the legacy of the Caribbean experience of colonialism in the areas of tourism marketing. With specific reference to the Bahamas and to the capital city Nassau, the study focused on the relationship between tourism and colonialism and on the implications this had for the development of a national identity. The study found that by relying on the images of a colonial past, the tourism industry merely perpetuates marketing the ideology of colonialism and prevents the local people from defining a national identity of their own.

Some other references in this area include Edgell (1987), Hiestand (1986), Fannin (1986), Fenn (1988), Meyer (1996), OTR (1986), Taylor (1989), Ahmad *et al.* (1990), Goodrich (1991), Mehta *et al.* (1981) and Walle (1976).

2.7. TOURISM MARKETING RELATED TO AUSTRALIA

Morrison *et al.* (1994) hypothesized that the availability of a smoke-free environment is perceived by many tourists from the major English-speaking countries to be an important facet of the hospitality product. In many of the non-English speaking countries, there is a propensity to have few restrictions on smoking. There is a potential conflict in simultaneously meeting the needs of both groups of tourists. For an empirical test, the Japanese and English-speaking tourists on Australia's Gold Coast were surveyed. The findings confirmed the hypothesis of the study. The paper, therefore, suggested that tourism marketers should incorporate these differentiating needs of inbound tourists in their marketing efforts.

Hill *et al.* (1995) conducted an exploratory study into the criteria for a successful cooperative marketing of tourism industries of marketing of different countries including Australia and the opportunity for strategic alliances in this field. Using Conjoint Analysis, the key variables in the decision-making process were identified including country-pair destinations and the nature of the origin target market. An examination of convergent validity across research techniques suggested that some key attributes may be situation specific.

Other studies related to Australian tourism marketing include Crampon *et al.* (1973), Witcher (1996), Robinson (1997), ATC (1991), Grouch *et al.* (1992) and WTO (1987).

CHAPTER THREE

AGGREGATE DEMAND FOR TOURISM BY GCC COUNTRIES: A SIMULTANEOUS EQUATIONS MODEL

ABSTRACT

This chapter uses regression analysis to determine the main variables influencing the aggregate demand for tourism by the six members of the GCC, namely: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates.

A single-equation model is first developed and tested. Since the GCC countries are open economies that depend heavily on the outside world, these countries must take the process of interaction between their economies and the rest of the world into consideration when analyzing aggregate demand for tourism. For this purpose, a simultaneous-equations model is developed and tested.

The results suggest that oil exports are the main determinant of GCC aggregate spending on tourism. However, there is a partial adjustment mechanism. The simultaneous equations system suggests the existence of significant feedback effects.

AGGREGATE DEMAND FOR TOURISM BY GCC COUNTRIES: A SIMULTANEOUS EQUATIONS MODEL

3.1 Introduction

The consumers of the six members of the GCC (Gulf Cooperation Council) value very much their family vacation and tend to have a strong demand for tourism services. There is a number of reasons for this:

1. The consumers of these members enjoy very high standard of living. Thus, average annual per capita income of the nationals ranges from US\$ 12,000 in the case of Oman to over US\$ 30,000 in the case of the United Arab Emirates. Given that the distribution of income is highly skewed in these countries, a large percentage of the population enjoys high incomes, which enable them to spend every vacation overseas.
2. Domestic tourist resorts in the GCC countries are either not existent or very underdeveloped. This motivates the consumers to seek foreign resorts for spending their vacations.
3. Summer in all GCC states is extremely hot. As a result, most residents seek resorts of mild weather to spend their vacation. Availability of air conditioning, in almost every place (the home, the office, the car etc.) is not a good substitute for open - air resorts.
4. The GCC national is in continuous contact with foreigners of different nationalities. This because of the heavy dependence of these countries on expatriate labor. Non-nationals make up over 60 percent of the

population in most of the GCC members. The interaction with foreign cultures has a strong influence on GCC consumer's attitudes towards traveling.

5. The relatively restrictive culture and social environment in the GCC countries motivate many citizens to seek a more liberal atmosphere during their vacations.
6. Some GCC citizens go overseas during their vacation to establish business contacts, enter into some transactions, receive education or simply strike some shopping bargains.

For the above reasons and others, the GCC countries spend, on average some 3-4 percent of their GDP on tourism. This spending amounted to over ten billion US dollars in 1998

This Chapter tries to analyze the main determinants of aggregate GCC spending on tourism. Regression analysis has been used for this purpose. The chapter is divided into three sections. Section one develops and tests a single-equation model of GCC demand for tourism. Section two tests the hypothesis that there is a feedback effect in the demand relationship. A simultaneous-equations model is developed and tested. The main conclusions of the chapter are summarized in section three.

3.2 A Single-equation Model of GCC Demand for Tourism:

Spending on tourism by GCC consumers depends on the performance of the export sector, and in particular oil exports, in these countries. This is so since oil is the main source of income and foreign exchange in these countries. It is reasonable, however, to assume that there is a partial adjustment mechanism in the response of the demand for tourism to changes in oil exports.

In order to understand this process of adjustment, suppose Y_t^* is the desired level of spending on tourism, Y_t is the actual level, and X_t is oil exports. Assume that the desired level of spending depends on oil exports as:

$$Y_t^* = \alpha + \beta X_t$$

Because of “frictions” in the market, the gap between the actual and desired levels cannot be closed simultaneously but only with some lag and random shocks (Greene, 1993). Suppose only a fraction of the gap is closed each period. In this case, spending on tourism in time t would equal that at time $t-1$, plus an adjustment factor, plus a random error term. More formally,

$$Y_t = Y_{t-1} + \lambda (Y_t^* - Y_{t-1}) + u_t \quad 0 < \lambda < 1$$

The parameter λ is called the adjustment coefficient and $1/\lambda$ is called the speed of adjustment.

The adjustment coefficient approximates the fraction of the gap closed in one period. The speed of adjustment approximates the number of periods it takes for most of the adjustment to take place (Gujarati, 1985). Thus, if $\lambda = 0.25$, approximately 25 per cent of the gap will be closed in one period, and the number of periods of adjustment is 4. If the desired level of spending on tourism Y^* exceeds

the actual spending level at the end of the time period $t-1$, we would expect part of that gap to close in period t , and hence Y_t will go up by $\lambda (Y_t^* - Y_{t-1})$ plus an unpredictable random shock (Davidson and Mackinnon, 1993). Combining the above two equations we get the model:

$$\begin{aligned}
 Y_t &= \alpha \lambda + (1 - \lambda) Y_{t-1} + \beta \lambda X_t + u_t \\
 &= \beta_0 + \beta_1 Y_{t-1} + \beta_2 X_t + u_t
 \end{aligned}$$

The above model can be stated as:

$$\text{Travel}_t = \alpha + \beta \text{Oil exports}_t + \gamma \text{Travel}_{t-1} + u_t$$

Where:

Travel_t = Spending on tourism in period t

Oil exports_t = Oil exports of the GCC countries in period t

Travel_{t-1} = Spending on tourism in period $t-1$

The above model was estimated, for the period 1974-1997, using the ordinary least squares method of estimation. The data were extracted from the IMF *International Financial Statistics 1998 Yearbook*, the International Bank 1997 *World Tables*, various issues of *GCC Economic Bulletins* and the Statistical Abstracts of individual GCC countries. The estimation was carried out using SPSS computer package (Norusis, 1992). Table 3-1 gives the regression results. These results suggest that the model is a good fit as indicated by the values of (adjusted) R^2

and F statistics. Also the estimated D-W statistic suggests that there is no serious problem of serial correlation (Kennedy, 1993). All variables carry the correct sign.

The data in Table 1 also suggest that oil exports are a major determinant of spending on tourism by GCC consumers. The “t” value of the coefficient of the variable “oilexp” which represents oil exports is significant beyond the 1 per cent level of significance. The short-term elasticity of tourism spending with respect to oil exports, at the mean values, is approximately .4714, while the long-term elasticity is 2.6163.

The coefficient of the lagged variable (travelag) lies between zero and one. The value of this coefficient (.285748) suggests that approximately .29 of the gap between the desired level of spending on tourism and the actual level of spending will be closed in one period and the number of periods of adjustment is approximately 3.5 years.

3.3 A Simultaneous equations Model of GCC Demand for Tourism:

The above single-equation model may be biased in explaining the GCC demand for tourism on the ground that it does not take into account the interaction between the economies of the GCC and the rest of the world. This interaction can be explained in two ways:

First, the growth in the world economy results in an increase in the demand for oil. An increase in oil exports results in an increase in the incomes of the GCC members. As their income rise, their demand for tourism will increase. This

represents an increase in the incomes of those countries in which the GCC consumers spend their vacation. The rise in income of the rest of the world will in turn stimulate the demand for oil.

Secondly, a rise in oil prices would increase costs of production of the oil importers. This may slow their rates of growth and hence their demand for oil. This may reduce oil exports, and hence the incomes, of the GCC countries. As a result, their demand for tourism will decline.

It follows from the above that the relationship between the GCC demand for tourism and their oil exports should also be examined by a simultaneous-equations model where the interaction process between the relevant variables is explicitly taken into account.

The following simultaneous relationship, known as structural equations, has been developed:

Structural equations:

$$\text{Travel}_t = a_0 + a_1 \text{ Oil exports}_t + a_2 \text{ Travel}_{t-1} + u_1$$

$$\text{Oil Exports}_t = b_0 + b_1 \text{ Oil prices}_t + b_2 \text{ World Growth}_t + u_2$$

$$\text{World Growth}_t = c_0 + c_1 \text{ World Exports}_t + c_2 \text{ Travel}_t + u_3$$

Endogenous Variables:

$$\text{Travel}_t = \text{GCC spending on tourism in period } t$$

$$\text{Oil Exports}_t = \text{Oil exports by members of the GCC in period } t$$

$$\text{World Growth}_t = \text{World rate of growth in period } t$$

Predetermined Variables:

Travel $_{t-1}$ = GCC spending on tourism in period $t-1$

Oil prices $_t$ = Oil prices in period t

World Exports $_t$ = World exports in period t

The first equation is very similar to the single-equation model. It examines the relationship between the GCC demand for tourism and oil exports within a process of partial adjustment.

The second equation tests the hypothesis that the forces of demand for and supply of oil determine oil exports. These forces are reflected in oil prices and world growth. It is expected that an increase in oil prices leads to an increase in export proceeds of the GCC countries, given the quantities exported. It is also expected that a rise in world growth rate lead to an increase in the demand for oil, given the price of oil. Thus the two coefficients, b_1 and b_2 are expected to carry a positive sign.

The third equation tests for existence of feedback effects. It assumes that world growth depends on world exports and on GCC imports of tourism services. If there is a significant feedback effect, the coefficient c_2 would be statistically significant.

The above system is mathematically complete in the sense that it contains as many equations as it contains endogenous variables. In order to select an appropriate method of estimation, we need to examine the identifiability of the structural equations

There are two conditions for identification: an order condition and a rank condition. The order condition may be stated as follows: for an equation to be identified, the total number of variables (endogenous and exogenous) excluded from it must be equal to or greater than the number of endogenous variables in the model less one (Ramanathan, 1992). This condition may be symbolically expressed as:

$$(K - M) \geq (G - 1)$$

where:

G = total number of equations (= total number of endogenous variables)

K = number of total variables in the model (endogenous and predetermined)

M = number of variables, endogenous and exogenous, included in a particular equation.

If the equality sign is satisfied, that is $(K - M) = (G - 1)$, the equation is exactly identified. If the inequality sign holds, that is if $(K - M) > (G - 1)$, the equation is over-identified (Maddala, 1992).

The order condition of identification is only a necessary condition. A sufficient condition for identification of a relationship is that the rank of the matrix of parameters of all the excluded variables (endogenous and predetermined) from that equation be equal to $(G - 1)$. This is called the rank condition of identification.

TABLE 3-1

SPSS REGRESSION RESULTS OF THE SINGLE-EQUATION MODEL

No. of Observations = 24

Dependent Variable: TRAVEL

Independent variables: OILEXP TRAVELAG

Multiple R .91677
 R Square .84046
 Adjusted R Square .82527
 Standard Error .86146

Analysis of Variance

	DF	Sum of Squares	Mean Square
Regression	2	82.10212	41.05106
Residual	21	15.58450	.74212

F = 55.31600 Significance of F = .0000

----- Variables in the Equation -----

Variable	B	SE B	95% Confidence	Intrvl B	Beta
OILEXP	.044876	.008875	.026420	.063332	.656832
TRAVELAG	.285748	.117144	.042133	.529363	.316860
(Constant)	1.927985	.598153	.684057	3.171912	

----- Variables in the Equation -----

Variable	Tolerance	VIF	T	Sig T
OILEXP	.450224	2.221	5.056	.0001
TRAVELAG	.450224	2.221	2.439	.0237
(Constant)		3.223	.0041	

Durbin-Watson Test = 1.42233

In other words the rank condition states that in a system of G equations, any particular equation is identified if, and only if, it is possible to construct at least one non-zero determinant of order $(G - 1)$ from the coefficients of the variables excluded from that particular equation but contained in the other equations of the model (Griffiths et al, 1993).

Applying the order and rank conditions of identification to our simultaneous-equations model, we verify that both conditions hold and each equation is over-identified. Hence the method of two-stage least squares is appropriate to estimate the equations of the model (Charemza and Deadman, 1992). Shazam computer program was used in the estimation (Shazam, 1993). The computer results for the three equations are given in Tables 3-2, 3-3 and 3-4. These results give the following simultaneous relationships. The figures in parentheses represent t-values. It may be mentioned that the various test statistics are given for what they are worth, as their precise meaning in small sample simultaneous models is arguable (Griffiths et al, 1993).

A summary of the regression results of the simultaneous-equations system

$$\text{Travel}_t = 1.892 + .049 \text{ Oil exports}_t + .246 \text{ Travel}_{t-1}$$

(3.347) (5.855) (2.862)

$$R^2 = .853, \quad DW=1.422$$

$$\text{Oil Exports}_t = 6.369 + 2.446 \text{ Oil prices}_t + 11.795 \text{ World Growth}_t$$

(1.010) (2.928) (2.281)

$$R^2 = .858, \quad DW=2.008$$

$$\text{World Growth}_t = -1.123 + .739 \text{ World Exports}_t + .468 \text{ Travel}_t$$

(-2.208) (2.458) (2.443)

$$R^2 = .807, \quad DW=1.407$$

The above summary and the full computer output (Tables 3-2, 3-3 and 3-4) suggest the following:

1. The simultaneous-equations model results support the single-equation model result that there is a positive significant correlation between GCC spending on tourism and oil exports. However, the simultaneous model would seem to give better statistical results (judged by the t values) than the single-equation model. The significance of the coefficient of the lagged dependent variable also suggests that the dependence of GCC demand for tourism on oil exports is subject to a significant partial adjustment mechanism.
2. There is a significant positive relationship between oil exports and each of oil prices and world growth.

3. Changes in world exports exert a significant influence on world growth, which, in turn affects oil exports.
4. There is a significant feedback effect in the relationship between world growth and GCC demand for tourism. The coefficient c_2 in the third equation is positive and statistically significant suggesting that GCC spending on tourism promotes world growth, which, in turn increases GCC oil exports, and hence income.

3.4 CONCLUSIONS

The main findings of this chapter may be summarized in the following:

1. GCC consumers spend a significant proportion of their incomes on tourism. The high standards of living enjoyed by the nationals of these countries, lack of adequate domestic resorts, the harsh weather conditions in summer, continuous contact with foreigners, restrictive domestic social systems and search for business and marketing opportunities overseas are major motives for GCC citizens to spend their vacations overseas.
2. Oil exports are the major determinant of aggregate spending on tourism by members of the GCC. The impact of changes in oil exports on tourism spending is, however, subject to a partial adjustment mechanism. A shock in the oil market requires some 3.5 years to close the gap between the desired level of spending on tourism and the previous level.

3. The interaction between the GCC economies and the rest of the world plays an important role in determining these countries' aggregate demand for tourism.
4. There is a significant feedback effect to tourism spending by the GCC. This spending represents an increase in the export of services of the tourist resorts. which results in a rise in the incomes of the visited countries. This, in turn increases their imports, including oil imports. The increase in oil imports results in an increase in incomes of the GCC countries.
5. Because of the existence of feedback effects, the use of a single-equation model to test the relationship between spending on tourism and oil exports could give biased results. A simultaneous-equations model is more appropriate in determining aggregate demand for tourism..

TABLE 3-2

Shazam Output of the Two-Stage Least Squares Regression Results:
Equation 1

2sls travel oilexp travelag (travelag wexp oilp)/dn max

TWO STAGE LEAST SQUARES - DEPENDENT VARIABLE = TRAVEL
3 EXOGENOUS VARIABLES
2 POSSIBLE ENDOGENOUS VARIABLES
24 OBSERVATIONS
DN OPTION IN EFFECT - DIVISOR IS N

R-SQUARE = 0.8889 R-SQUARE ADJUSTED = 0.8535
VARIANCE OF THE ESTIMATE-SIGMA**2 = 0.65587
STANDARD ERROR OF THE ESTIMATE-SIGMA = 0.80986
SUM OF SQUARED ERRORS-SSE= 15.741
MEAN OF DEPENDENT VARIABLE = 7.5432

Variable Name	ASYMPTOTIC		T-ratio ***** DF	Partial P-Value Corr.	Standardized Coefficient	Elasticity At Means
	Estimated Coefficient	Standard Error				
OILEXP	0.48950E-01	0.0836E-02	5.855	1.000 0.705	0.7165	0.5142
TRAVELAG	0.24587	0.0859	2.862	1.000 0.385	0.2726	0.2349
CONSTANT	1.8925	0.5654	3.347	1.000 0.590	0.0000	0.2509

VARIANCE-COVARIANCE MATRIX OF COEFFICIENTS

OILEXP 0.11570E-03
TRAVELAG -0.11324E-02 0.16543E-01
CONSTANT -0.10070E-02 -0.29496E-01 0.31970
OILEXP TRAVELAG CONSTANT

CORRELATION MATRIX OF COEFFICIENTS

OILEXP 1.0000
TRAVELAG -0.81849 1.0000
CONSTANT -0.16558 -0.40559 1.0000
OILEXP TRAVELAG CONSTANT

DURBIN-WATSON = 1.3291 VON NEUMANN RATIO = 1.3868 RHO = 0.27941
RESIDUAL SUM = 0.27534E-13 RESIDUAL VARIANCE = 0.65587
SUM OF ABSOLUTE ERRORS= 15.843
R-SQUARE BETWEEN OBSERVED AND PREDICTED = 0.8393
RUNS TEST: 6 RUNS, 13 POSITIVE, 11 NEGATIVE, NORMAL STATISTIC = -2.9083

TABLE 3-3
Shazam output of the Two-Stage Least Squares Regression Results:
Equation 2

2sls oilxp oilp wgrowth (oilp wexp travelag)/dn max

TWO STAGE LEAST SQUARES - DEPENDENT VARIABLE = OILEXP
 3 EXOGENOUS VARIABLES
 2 POSSIBLE ENDOGENOUS VARIABLES
 24 OBSERVATIONS
 DN OPTION IN EFFECT - DIVISOR IS N

R-SQUARE = 0.8705 R-SQUARE ADJUSTED = 0.8581
 VARIANCE OF THE ESTIMATE-SIGMA**2 = 112.95
 STANDARD ERROR OF THE ESTIMATE-SIGMA = 10.628
 SUM OF SQUARED ERRORS-SSE= 2710.8
 MEAN OF DEPENDENT VARIABLE = 79.237

Variable Name	ASYMPTOTIC		T-Ratio ***** DF	Partial		Standardized Coefficient	Elasticity At Means
	Estimated Coefficient	Standard Error		P-Value	Corr.		
OILP	2.4464	0.835	2.928	0.998	0.538	0.5892	0.5884
WGROWTH	11.795	5.164	2.281	0.987	0.338	0.4324	0.3312
CONSTANT	6.3687	6.304	1.010	0.844	0.215	0.0000	0.0804

VARIANCE-COVARIANCE MATRIX OF COEFFICIENTS

OILP	0.69828		
WGROWTH	-5.5730	51.317	
CONSTANT	-0.90808	-7.9678	39.741
	OILP	WGROWTH	CONSTANT

CORRELATION MATRIX OF COEFFICIENTS

OILP	1.0000		
WGROWTH	-0.93099	1.0000	
CONSTANT	-0.17238	-0.17644	1.0000
	OILP	WGROWTH	CONSTANT

DURBIN-WATSON = 2.0082 VON NEUMANN RATIO = 2.0955 RHO = -0.00621
 RESIDUAL SUM = 0.12079E-12 RESIDUAL VARIANCE = 112.95
 SUM OF ABSOLUTE ERRORS= 200.27
 R-SQUARE BETWEEN OBSERVED AND PREDICTED = 0.8707
 RUNS TEST: 10 RUNS, 13 POSITIVE, 11 NEGATIVE, NORMAL STATISTIC = -1.2264

TABLE 3-4

Shazam output of the Two-Stage Least Squares Regression Results:
Equation 3

2sls wgrowth wexp travel (wexp oilp travelag)/dn max

TWO STAGE LEAST SQUARES - DEPENDENT VARIABLE = WGROWTH
3 EXOGENOUS VARIABLES
2 POSSIBLE ENDOGENOUS VARIABLES
24 OBSERVATIONS
DN OPTION IN EFFECT - DIVISOR IS N

R-SQUARE = 0.8410 R-SQUARE ADJUSTED = 0.8068
VARIANCE OF THE ESTIMATE-SIGMA**2 = 0.42070
STANDARD ERROR OF THE ESTIMATE-SIGMA = 0.64861
SUM OF SQUARED ERRORS-SSE= 10.097
MEAN OF DEPENDENT VARIABLE = 2.2250

Variable Name	ASYMPTOTIC		T-RATIO ***** DF	Partial P-Value	Standardized Corr. Coefficient	Elasticity At Means
	Estimated Coefficient	Standard Error				
WEXP	.73882	0.3006	2.4578	1.000	0.132	0.0858
TRAVEL	.46814	0.1916	2.4433	1.000	0.781	0.8725
CONSTANT	-1.1232	0.5538	-2.0282	0.021	-0.405	0.0000

VARIANCE-COVARIANCE MATRIX OF COEFFICIENTS

WEXP	0.14545E-03		
TRAVEL	-0.48082E-03	0.66719E-02	
CONSTANT	0.22454E-04	-0.38412E-01	0.30672
	WEXP	TRAVEL	CONSTANT

CORRELATION MATRIX OF COEFFICIENTS

WEXP	1.0000		
TRAVEL	-0.48809	1.0000	
CONSTANT	0.33617E-02	-0.84912	1.0000
	WEXP	TRAVEL	CONSTANT

DURBIN-WATSON = 1.4066 VON NEUMANN RATIO = 1.4678 RHO = 0.26166
RESIDUAL SUM = -0.10214E-13 RESIDUAL VARIANCE = 0.42070
SUM OF ABSOLUTE ERRORS= 12.891
R-SQUARE BETWEEN OBSERVED AND PREDICTED = 0.6423
RUNS TEST: 10 RUNS, 9 POSITIVE, 15 NEGATIVE, NORMAL STATISTIC = -1.0049

CHAPTER FOUR

ATTITUDES of GCC CONSUMERS TOWARDS TOURIST RESORTS: *SURVEY RESULTS*

Abstract

A survey was conducted by the researcher during the months of April and May 1999 to find out how the consumers of the GCC countries rate tourist resorts and the main demographic factors which may discriminate between those who expressed interest to visit Australia and those who did not. Three random samples, each has 385 members, were collected. This Chapter summarizes the main characteristics of the samples. The following two chapters apply factor analysis and discriminant analysis to the survey results.

ATTITUDES of GCC CONSUMERS TOWARDS TOURIST RESORTS: SURVEY RESULTS

4.1 Introduction

The consumers of the GCC (The Gulf Cooperation Council, which consists of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates) attach a high degree of importance to family vacation. Also, the hot climate in summer; the intensive contact with foreigners and the high degree of wealth have affected the attitudes of GCC consumers towards travel. For these reasons, Each member of the GCC spends well over 5 per cent of its GDP on traveling.

A number of vacation resorts are available to the GCC tourists. Some of these are located in neighboring Arab countries [Egypt, Lebanon, Morocco, Tunisia, etc], while others are in Western countries [Europe, USA, Australia]. A survey was conducted by the researcher during the three months of April and May of 1999. The main objectives of the survey are:

1. To find out how GCC consumers evaluate various tourist resorts.
2. To find out how the consumers who expressed interest to visit Australia differ in their demographic profile from those who are not interested.
3. To find out how the consumers of the various GCC countries differ in terms of their preference ratings of different variables affecting their decision to visit a particular resort.

The survey was conducted in the three largest (in terms of population) GCC countries, namely Saudi Arabia, Kuwait and the United Arab Emirates. The period during which the survey was conducted was carefully selected. We avoided the summer period (June, July and August) to make sure that most GCC citizens are available for inclusion in the samples. Also, the selected period was the one during which consumers usually make their decisions about traveling and choice of tourist resorts.

4.2 Sample Size

Three samples were selected: one from Kuwait, another one from Saudi Arabia and a third sample from the United Arab Emirates.

Each sample size was determined using the following assumptions:

1. A proportion (π) of 50%. This is the safest possible assumption
2. A confidence level of 95%. This corresponds to a Z value of 1.96
3. A precision rate (D) of .05%

This gave a sample size, in each of the three GCC country, equals:

$$\begin{aligned}
 n &= \frac{\{ (\pi) (1 - \pi) Z^2 \}}{D^2} \\
 &= \frac{\{ 0.5 (1 - 0.5) (1.96)^2 \}}{(0.05)^2} \\
 &= 385 \text{ (rounded to the next higher integer)}
 \end{aligned}$$

SAMPLE SELECTION

Members of the samples were selected from the capital cities of the three GCC countries, i.e. Kuwait, Riyadh and Dubai

Only GCC citizens were considered. Expatriates were excluded on the ground that they normally spend their vacation in their country of origin.

A questionnaire was prepared in both Arabic and English languages (a copy of which is given in Appendix 1 of this Chapter). Sample control, speed and obtaining sensitive information were the main factors, which the researcher took into consideration when deciding on the survey method. Traditional telephone interviews proved the most appropriate (Childers and Skinner, 1989; Colombotos, 1969 and Frey, 1983).

The phone directory of each capital city was consulted in each case. A table of random numbers was used to select the page number in the directory and the phone number of the potential respondent. When the number was not successful (e.g. does not answer or belongs to an expatriate) the next number on the same page was dialed. (Czaja et al, 1982; O'Rourke and Blair, 1983 and Guengel et al, 1983).

4.3.The Variables

The respondents were asked to indicate how each of the following factors are important in selecting a tourist resort using a five-point scale:

1. is not important at all
2. of little importance
3. important

4. very important
5. extremely important.

The variables are:

- V1. Traveling expenses
- V2. Tourist packages
- V3. Natural scenes
- V4. Unique features
- V5. Family attractions
- V6. Weather
- V7. Cost of accommodation
- V8. Cost of living at resort
- V9. Children attractions
- V10. Night entertainment
- V11. Knowledge of places to visit and see
- V12. Shopping bargains
- V13. Recommendations of relatives and friends
- V14. Prior information about the resort
- V15. Communications with nationals
- V16. Internal transport facilities and cost
- V17. Service standards
- V18. Medical facilities at resort
- V19. Adventures
- V20. Memories to bring back home

The Gulf tourists were also asked to rate the tourist resorts they visited in 1998 over five attributes on a 7-point scale. The attributes (analysed in Chapter seven) are:

- Travelling costs (1= extremely low, ,7=extremely high)
- Living expenses (1=extremely low, ,7=extremely high)
- Degree of comfort (1=extremely uncomfortable, ,7=extremely comfortable)
- Endowment with attractions and adventures (1= extremely poor)7 = extremely rich)
- Entertainment (1=extremely dull,....., 7=extremely Entertaining)

Data were also obtained on monthly household income (INCOME), importance of travel (Travel, measured on a five-point scale), importance attached to family vacation (VACATION, measured on a five-point scale), family size (FSIZE), age of the head of the household (AGE), and whether the respondent would be interested in visiting Australia (Visit, Yes or No) Appendix 1 gives the frequencies, means and standard deviations of the variables for the three samples.

4.4 Descriptive Statistics of Survey Results:

The data in Appendix 1 (Tables 1-3) would seem to suggest that:

1. Kuwaiti consumers attach importance to all mentioned variables. The mean rating given to each variable (on a five-point scale) was greater than 3. The only exceptions were the variables “weather” with an average rating equal to 2.971.
2. Well over two-thirds of Kuwaiti consumers consider all variables important with the exception of cost of accommodation, where only 46.4% of respondents consider it important when selecting a tourist resort.
3. Saudi consumers attach importance to all variables with the exception of “communication with nationals” and “adventures”. These two variables received an average rating of 2.249 and 1.795 respectively on a five-point scale. Also, the Saudi consumers give an average rating of 2.951, 2.997, 2.971 and 2.883 for the variables “weather”, “prior information about the resort”, “internal transport facilities and cost” and “service standards” respectively.
4. The majority of Saudi consumers (over two-thirds) attach importance to all variables with the exception of “communication with nationals” and “adventures”.
5. The UAE consumers gave an average rating greater than 3 for all variables with the exception of “weather” (2.953); “cost of accommodation (2.805); “internal transport facilities and cost (2.974); and service standards (2.886).

6. Approximately two-thirds of the UAE consumers consider all variables important except “cost of accommodation” and “service standards”.
7. 24.9% of the Kuwaiti respondents expressed interest to visit Australia. The corresponding percentages for Saudi Arabia and the United Arab Emirates were 15.6% and 34.3% respectively. It may be interesting to note that the UAE is the only country amongst the three sample countries which has direct flights with Australia.
8. There seems to be substantial differences between the ratings of the respondents of the three GCC countries as can be seen from the data in Table 4-1
9. The data in Appendix 1 suggest that the demographic profiles of the respondents of the three samples are different. Thus, the mean monthly household income of the UAE respondents is US\$5341 compared with US\$3809 and US\$2473 for Kuwaiti and Saudi respondents respectively. Also, the average family size for the UAE sample was 4.122 compared with 4.878 and 5.122 in the cases of Kuwait and Saudi Arabia respectively. However, the mean age in the three countries is very similar.
10. Family vacation seems to be very important to the respondents of all three GCC countries with a mean rating in excess of 4 (on a five-point scale) in the cases of Kuwait and Saudi Arabia and a mean rating of 3.56 in the case of the UAE.

11. The respondents of the three GCC countries do not differ much in their attitudes towards travel with a mean rating of 3.439, 3.439 and 3.434 for Kuwaiti, Saudi Arabian and UAE respondents respectively.

Table 4-1

**A comparison Between Kuwaiti, Saudi and UAE Consumers' Evaluation
of Tourist Resorts**

		<u>Mean Values of Consumer Ratings</u>		
		KUWAIT	SA	UAE
V1	Traveling expenses	3.15325	4.04116	3.13247
V2	Tourist packages	3.29091	4.08831	3.27273
V3	Natural scenes	3.36364	3.34026	3.44113
V4	Unique features	3.04935	3.02597	3.10255
V5	Family attractions	3.20779	3.18182	3.18442
V6	Weather	2.97143	2.95065	2.95325
V7	Cost of accommodation	2.82078	4.18182	2.80519
V8	Cost of living at resort	3.18961	4.07532	3.16883
V9	Children attractions	3.54805	3.52727	3.52468
V10	Night entertainment	3.36883	3.34805	3.64582
V11	Knowledge of places			
	to visit and see	4.04416	3.14805	3.14545
V12	Shopping bargains	4.04416	3.20000	3.20660
V13	Recommendations of			
	relatives and friends	3.33247	3.30909	3.14108
V14	Prior information about			
	the resort	3.02338	2.99740	3.92727
V15	Communications with			
	nationals	3.19221	2.24935	4.06494
V16	Internal transport facilities			
	and cost	3.96623	2.97143	3.10743
V17	Service standards	3.66753	2.88312	3.88571
V18	Medical facilities at resort	4.05714	3.13506	3.31376
V19	Adventures	3.48571	1.79481	4.14545
V20	Memories to bring back home	3.32987	3.30649	4.16623

4.5 CONCLUSIONS

This chapter presented the results of a survey conducted by the Researcher in three Gulf cities, namely Kuwait, Riyadh and Dubai. A random sample of size 385 was selected from each city.

The descriptive statistics suggest that the GCC consumers evaluate tourist resorts on 20 criteria. The relative importance of the considered variables varies within each member state and between states.

The survey results suggest that there are differences in the demographic profiles of the various GCC countries; particularly household income and family size.

The survey results suggest that family vacation is important to the consumers of the GCC countries and that there is very little difference in the attitude of these consumers to traveling.

The survey results indicate that a significant proportion of GCC consumers consider Australia as a tourist resort. This proportion is relatively higher in the United Arab Emirates than in Kuwait and relatively higher in Kuwait than in Saudi Arabia.

The survey results would be the subject of factor analysis, discriminant analysis and cluster analysis in the following few chapters.

CHAPTER FIVE

GCC CONSUMERS' EVALUATION OF TOURIST RESORTS: FACTOR ANALYSIS

ABSTRACT

The survey conducted by the Researcher in three capital GCC cities, contained a large number of variables, most of which are correlated. This chapter attempts to examine the relationships among the interrelated variables and represent them in terms of a few underlying factors. This is done through the use of the technique of Factor Analysis. The principal component method, using varimax rotation, reduced the 20 explanatory variables, in each sample, to four factors. The similarity between the attitudes of the consumers in the three GCC capital cities towards tourist resorts, is reflected in the similarity in the loading of various variables on different factors. Thus, it was possible in all three samples to identify the four factors as “cost factor”; “attraction factor”; “convenience factor” and “image factor”.

GCC CONSUMERS' EVALUATION OF TOURIST RESORTS: FACTOR ANALYSIS

5.1 Introduction

This Chapter uses the survey results of the previous chapter to find out how GCC consumers evaluate tourist resorts. The survey contained a large number of variables, most of which are correlated. This chapter tries to examine the relationships among the interrelated variables and represent them in terms of a few underlying factors. This is done through the use of the technique of Factor Analysis.

The chapter is divided into four sections. Section one outlines the relevant variables contained in the survey. Section two briefly reviews the technique of factor analysis. Section three gives the main results of the factor model for each of the sample countries. Finally, section four summarizes the main conclusions of the study.

5.2 The Data

As was explained in the previous Chapter, data were collected from three samples (each has a 385 members) of consumers in the capital cities of Kuwait, Saudi Arabia and the United Arab Emirates to examine the attitudes of the GCC citizens towards various tourist destinations.

Respondents were asked to rate the importance of 20 resort attributes. A five-point scale ranging from not important at all to extremely important was employed. The variables are:

- V1. Traveling expenses
- V2. Tourist packages
- V3. Natural scenes
- V4. Unique features
- V5. Family attractions
- V6. Weather
- V7. Cost of accommodation
- V8. Cost of living at resort
- V9. Children attractions
- V10. Night entertainment
- V11. Knowledge of places to visit and see
- V12. Shopping bargains
- V13. Recommendations of relatives and friends
- V14. Prior information about the resort
- V15. Communications with nationals
- V16. Internal transport facilities and cost
- V17. Service standards
- V18. Medical facilities at resort
- V19. Adventures
- V20. Memories to bring back home

This chapter uses factor analysis to identify underlying dimensions, or factors that explain the correlations among the above set of variables and to identify a new, smaller, set of uncorrelated variables to replace the original correlated variables in subsequent multivariate analysis.

5.3. Methodology

Factor analysis is unduly used by social scientists as a variable-reducing technique. This section briefly reviews the mathematics of this technique. The review is heavily based on the work developed by Muliak (1972) and summarized by Malhotra et. al (1996).

Mathematically, factor analysis is somewhat similar to multiple regression analysis, in that each variable is expressed as a linear combination of underlying factors. The amount of variance one variable shares with all other variables included in the analysis is referred to as communality. The co-variation among the variables is described in terms of a small number of common factors plus a unique factor for each variable. These factors are not overtly observed. If the variables are standardized, the factor model may be represented as:

$$X_i = A_{i1}F_1 + A_{i2}F_2 + A_{i3}F_3 + \dots + A_{im}F_m + V_iU_i$$

where:

X_i = i th standardized variable

A_{ij} = standardized multiple regression coefficient of variable i on common factor j

F_i = common factor

V_i = standardized regression coefficient of variable i on unique factor i

U_i = the unique factor of variable i

m = number of common factors

The unique factors are un-correlated with each other and with the common factors. The common factors themselves can be expressed as linear combinations of the observed variables.

$$F_i = W_{i1}X_1 + W_{i2}X_2 + W_{i3}X_3 + \dots + W_{ik}X_k$$

where:

F_i = estimate of i th factor

W_i = weight or factor score coefficient

k = number of variables

It is possible to select weights or factor score coefficients so that the first factor explains the largest portion of the total variance. Then a second set of weights can be selected, so that the second factor accounts for most of the residual variance, subject to being uncorrelated with the first factor. This same principal could be applied to selecting additional weights for the additional factors. Thus, the factors can be estimated so that their factor scores, unlike the values of the original variables, are not correlated. Furthermore, the first factor accounts for the highest variance in the data, the second factor the second highest, and so on.

In the factor analysis mode, hypothetical components are derived that account for the linear relationship between observed variables. The factor

analysis model requires that the relationships between observed variables be linear and that the variables have non-zero correlations between them. The derived hypothetical components have the following properties:

1. They form a linearly independent set of variables. No hypothetical component is derivable from the other hypothetical components as a linear combination of them
2. The hypothetical components' variables can be divided into two basic kinds of components: common factors and unique factors. These two components can be distinguished in terms of the patterns of weights in the linear equations that derive the observed variables from the hypothetical components' variables. A common factor has more than one variable with a non-zero weight or factor loading associated with the factor. A unique factor has only one variable with a non-zero weight associated with the factor. Hence, only one variable depends upon a unique factor.
3. Common factors are always assumed to be uncorrelated with the unique factors. Unique factors are also usually assumed to be mutually uncorrelated, but common factors may or may not be correlated with each other.
4. Generally, it is assumed that there are fewer common factors than observed variables. However, the number of unique factors is usually assumed to be equal to the number of observed variables.

The following notations are used:

X = An $n \times 1$ random vector of observed random variables $X_1, X_2, X_3, \dots, X_n$.

It is assumed that

$$E(X) = 0, \text{ and}$$

$$E(XX') = R_{xx'} \text{ a correlation matrix with units in the main diagonal.}$$

F = An $m \times 1$ vector of m common factors F_1, F_2, \dots, F_m . It is assumed that

$$E(F) = 0, \text{ and}$$

$$E(FF') = R_{ff'} \text{ a correlation matrix}$$

U = An $n \times 1$ random vector of the n unique factors variables U_1, U_2, \dots, U_n .

It is assumed that

$$E(U) = 0, \text{ and}$$

$E(UU') = I$. The unique factors are normalized to have unit variances and are mutually uncorrelated

A = An $n \times m$ matrix of coefficients called the factor pattern matrix

V = An $n \times n$ diagonal matrix of coefficients for the unique factors.

The observed variables, which are the coordinates of X , are weighted combinations of the common factors and the unique factors. The fundamental equation of factor analysis can then be written as:

$$X = AF + VU$$

The correlations between variables in terms of the factors may be derived as follows:

$$\begin{aligned}
 R_{xx} &= E(XX') \\
 &= E\{(AF + VU)(AF + VU)'\} \\
 &= E\{(AF + VU)(F'A' + U'V')\} \\
 &= E(AFF'A' + AFU'V' + VUF'A' + VUU'V') \\
 &= AR_{ff}A' + AR_{fu}V' + VR_{uf}A' + V^2
 \end{aligned}$$

Given that the common factors are uncorrelated with the unique factors, we have:

$$R_{fu} = R_{uf}' = 0.$$

Hence,

$$R_{xx} = AR_{ff}A' + V^2$$

Suppose we subtract the matrix of unique factor variance, V^2 , from both sides. We then obtain:

$$R_{xx} - V^2 = AR_{ff}A'$$

R_{xx} is dependent only upon the common factor variables, and the correlations among the variable are related only to the common factors. Let $R_c = R_{xx} - V^2$ be the reduced correlation matrix.

We have already defined the factor pattern matrix A . The coefficients of the factor pattern matrix are weights assigned to the common factors when the observed variables are expressed as linear combinations of the common and unique factors. We now define the factor structure matrix. The coefficients of the factor structure matrix are the covariances between the observed variables and the factors. The factor structure matrix is helpful in the interpretation of factors as it shows which variables are similar to a common factor variable. The factor structure matrix, A_s , is defined as:

$$\begin{aligned}
 A_s &= E(XF') \\
 &= E[(AF + VU)F'] \\
 &= AR_{ff} + VR_{uf} \\
 &= AR_{ff}
 \end{aligned}$$

Thus, the factor structure matrix is equivalent to the factor pattern matrix A multiplied by the matrix of covariance's among the factors R_{ff} . Substituting A_s for AR_{ff} , the reduced correlation matrix becomes the product of the factor structure and the factor pattern matrix.

$$\begin{aligned}
 R_c &= AR_{ff}A' \\
 &= A_sA'
 \end{aligned}$$

5.4 Statistical Results

The main results of factor analysis are given in Tables 5-1, 5-2 and 5-3 for the Kuwaiti, Saudi and UAE samples respectively. An investigation of the results would seem to suggest that:

1. The coefficients on the diagonals of the Anti-image correlation matrix are greater than .5 for each sample. Therefore, we need not eliminate any of the variables.
2. The correlation matrix, in each case, shows that well over 50% of the coefficients are statistically significant at the 5 percent level of significance. Also, all variables, in each sample, have a large correlation with more than one of the other variables. This suggests adequacy of the factor model.
3. The Kaiser-Meyer-Olkin (KMO) measure of sample adequacy has a value of .863, .879 and .873 for the three samples respectively. These values (which are close to .9) are considered “marvelous” and suggest that the factor model is highly appropriate. The same conclusion is inferred from the high significant levels of Bartlett test of sphericity in each case.
4. The initial statistics suggest that there are only four factors with an eigenvalue greater than one in each sample. The four factors account

for 64.8 percent, 66.2 percent and 64.5 percent of the total variance for the Kuwaiti, Saudi and UAE samples respectively.

5. The factor matrix gives factor loadings . For example, the traveling expenses (V1) rating can be expressed as:

Kuwait:

$$\text{Traveling expenses} = .622 F_1 + .075 F_2 + .513 F_3 + .318 F_4$$

Saudi Arabia:

$$\text{Traveling expenses} = .621 F_1 - .233 F_2 - .531 F_3 - .367 F_4$$

UAE:

$$\text{Traveling expenses} = .625 F_1 + .099 F_2 + .569 F_3 + .180 F_4$$

6. The upper right triangle in the reproduced correlation matrix represents the residuals i.e. the difference between the observed correlation coefficient and that estimated from the model. The magnitudes of the residuals indicate how well the fitted model reproduces the observed correlations. The results reveal that only 33% of the residuals are greater than 0.05 (in absolute value) in the case of the Kuwaiti sample. The comparable figures for the Saudi and UAE samples are 35 % and 34 % respectively. This suggests goodness of fit in all cases.
7. Although the initial or unrotated factor matrix indicates the relationship between the factors and individual variables, it does not results in factors

which can be interpreted. For example, factor 1 in Table 1 is highly correlated with 18 out of the 20 variables. In such a complex matrix, it is difficult to interpret the factors. Therefore, through rotation, the factor matrix is transformed into a simpler one that is easier to interpret.

8. The rotated factor matrix (using the varimax procedure) suggests that, for the Kuwaiti sample, factor 1 has high coefficients for variables v3 (natural scenes), V4 (unique features), V5 (family attractions), V9 (children attractions) and v10 (night entertainment). This factor may be labeled “attractions”. Factor 2, in the case of the Kuwaiti sample, is highly related with V6 (weather), V11 (knowledge of places to visit and see), V12 (shopping bargains), V16 (internal transport facilities and cost), V17 (service standards) and V18 (medical facilities at resort). This factor may be labeled “convenience”. Factor 3 has high coefficients on V13 (recommendations of relatives and friends), V14 (prior information about the resort), V15 (communications with nationals), V19 (adventures) and V20 (memories to bring back home). This factor may be labeled “image”. Finally factor 4 in the case of the Kuwaiti sample is highly related with variables V1 (traveling expenses), V2 (tourist packages), V7 (cost of accommodation) and V8 (cost of living at resort). This factor may be labeled “cost”.
9. The rotated factor matrix in the cases of Saudi Arabia suggests that factor 1, which has high coefficients on variables V3, V4, V5, V9 and V10, may be labeled “attractions” while factors 2, 3 and 4 may be labeled “cost”,

“convenience” and “image” respectively; given their high coefficients on the relevant variables.

10. The rotated factor matrix in the case of the UAE sample suggests that factors 1, 2, 3 and 4 may be labeled “attractions”, “image”, “convenience” and “cost” respectively. This labeling follows from the size of the relevant coefficients in each factor.

5.5 Conclusions

The main findings of this chapter may be summarized in the following:

1. Factor analysis was performed on the 20 explanatory variables with the prime goal of data reduction
2. The number of statistically significant coefficients in the correlation matrix; the value of KMO measure of sample adequacy, the significance of Bartlett test of sphericity, the percentage of variance explained by the extracted factors and the percentage of significant residuals all suggest that the factor model is suitable for this analysis and the fit is good for each sample.
3. The principal components method, using varimax rotation, reduced the 20 explanatory variables, in each sample, to four factors having values greater than 1.0.
4. For the purpose of interpretation, each factor was composed of variables that loaded .45 or higher on that variable.
5. The similarity between the attitudes of the consumers in the three GCC capital cities towards tourist resorts is reflected in the similarity in the loading of

various variables on different factors. Thus, it was possible in all three samples to identify the four factors as: “ cost factor”; “attraction variable”; “convenience factor” and “image factor”.

6. Four factor scores are computed for each individual in each GCC capital city. The factor scores can be used instead of the original variables, in subsequent multivariate statistical analysis. Discriminant analysis is conducted in the next chapter to determine which, if any, of the four factors predicted selection of Australia as a tourist resort.

TABLE 5-1
FACTOR ANALYSIS FOR KUWAITI RESPONDENTS

Number of Cases = 385
Correlation Matrix:

	V1	V2	V3	V4	V5	V6	V7
V1	1.00000						
V2	.34141	1.00000					
V3	.32005	.04338	1.00000				
V4	.40296	.12126	.50101	1.00000			
V5	.08524	.12835	.44067	.45543	1.00000		
V6	.47263	.19221	.37132	.35338	.40677	1.00000	
V7	.39233	.44620	.08784	.10849	.06968	.24829	1.00000
V8	.89618	.37283	.35204	.44899	.17465	.55781	.46072
V9	.28520	.14221	.60085	.53165	.54097	.26360	.16295
V10	.19177	.05560	.56199	.53126	.58717	.35724	.08831
V11	.26464	.15633	.24970	.27163	.29679	.39609	.07851
V12	.21177	-.00347	.25854	.26184	.28198	.37876	.11049
V13	.25046	.12023	.27738	.30509	.34230	.40150	.08016
V14	.45214	.21344	.29801	.39399	.23754	.46561	.15035
V15	.31034	.13110	.29661	.31987	.35172	.48021	.15370
V16	.41319	.08384	.40631	.42313	.41981	.63566	.13579
V17	.15644	.02613	.18464	.21588	.23016	.46556	.03593
V18	.36868	.12544	.27933	.32583	.22076	.49034	.11332
V19	.28121	.09602	.24366	.18271	.16502	.37059	.12363
V20	.26485	.13193	.25881	.19868	.23104	.45664	.11734

V8	V9	V10	V11	V12	V13	V14	
V8	1.00000						
V9	.34471	1.00000					
V10	.30182	.65676	1.00000				
V11	.24986	.14897	.22891	1.00000			
V12	.23422	.20214	.25823	.46612	1.00000		
V13	.30372	.27071	.29841	.33559	.18460	1.00000	
V14	.48241	.22248	.24613	.33788	.24135	.48936	1.00000
V15	.36169	.24835	.29964	.14147	.31793	.46095	.49022
V16	.44878	.33385	.38279	.50044	.47531	.39725	.35085
V17	.14398	.04849	.12083	.50169	.60327	.20290	.21862
V18	.35870	.16091	.22756	.83839	.50521	.34168	.45865
V19	.31706	.15455	.20714	.26524	.24874	.58336	.55235
V20	.33655	.16786	.19501	.20949	.27510	.56653	.54827

	V15	V16	V17	V18	V19	V20
V15	1.00000					
V16	.42161	1.00000				
V17	.24387	.48126	1.00000			
V18	.14717	.54626	.52526	1.00000		
V19	.51790	.30392	.26198	.34663	1.00000	
V20	.56745	.38057	.24095	.30277	.65074	1.00000

Determinant of Correlation Matrix = .0000068

Kaiser-Meyer-Olkin Measure of Sampling Adequacy = .86328

Bartlett Test of Sphericity = 4479.4131, Significance = .00000

Anti-image Correlation Matrix:

	V1	V2	V3	V4	V5	V6	V7
V1	.77935						
V2	-.04191	.76689					
V3	-.09063	.09325	.92819				
V4	-.03344	.02398	-.11890	.91973			
V5	.12257	-.11250	-.02940	-.13734	.88181		
V6	.07085	.01216	-.05973	.13235	-.19360	.90007	
V7	.05217	-.33007	.03132	.07475	.00383	-.05051	.80587
V8	-.80434	-.08488	.04011	-.11662	.05219	-.24728	-.22269
V9	-.06547	-.06814	-.31033	-.14339	-.22913	.11007	-.06445
V10	.17939	.05870	-.17330	-.16554	-.22560	-.08077	.03021
V11	-.02564	-.14698	-.03068	.06950	-.17441	.10830	.03012
V12	.03484	.12988	.01140	.03497	-.04391	.11854	-.08344
V13	.02512	.01291	.05557	-.05995	-.09774	-.01908	.03143
V14	-.06012	-.07121	-.00716	-.17287	-.02373	-.06359	.07687
V15	-.06439	-.01264	.00470	-.08212	-.09137	-.15251	-.02451
V16	-.06496	.09480	-.04174	-.06013	-.08273	-.25107	.03851
V17	-.03830	-.04062	-.01317	-.11049	-.01062	-.27000	.02917
V18	-.05073	.06064	.00234	-.09064	.15109	-.15914	-.01219
V19	-.01852	.05620	-.04353	.12191	.09004	.07533	-.04762
V20	.11393	-.05722	-.06431	.08994	.00017	-.09065	.03916
	V8	V9	V10	V11	V12	V13	V14
V8	.79016						
V9	-.00392	.86568					
V10	-.14367	-.32848	.88082				
V11	.04426	.07532	-.02640	.78467			
V12	-.06025	-.06193	-.06219	-.03730	.86145		
V13	-.00921	-.06505	-.00668	-.14816	.13046	.91778	
V14	-.04787	.03602	.03204	.06087	.04808	-.07640	.91978
V15	.04648	.04861	-.02276	-.04486	-.18442	-.05838	-.19090
V16	-.03712	-.04003	-.01816	-.06717	-.07626	-.09042	.14264
V17	.14076	.08859	.10634	-.08905	-.41409	.04439	.07356
V18	.01712	-.00349	-.00393	-.72296	-.15518	.03723	-.23964
V19	-.00817	.00488	-.08052	.03034	.02853	-.28745	-.17278
V20	-.08039	.00968	.07761	.12116	-.08010	-.21566	-.16327
	V15	V16	V17	V18	V19	V20	
V15	.88549						
V16	-.13896	.94451					
V17	.00632	-.11225	.83970				
V18	.29570	-.12228	-.06270	.78830			
V19	-.19615	.09206	-.11482	-.09847	.87403		
V20	-.19806	-.07359	.03462	-.06423	-.31860	.89125	

Initial Statistics:

Variable	Communality *		Factor	Eigenvalue	Pct of Var	Cum Pct
	*					
V1	1.00000 *		1	7.16093	35.8	35.8
V2	1.00000 *	2	2.08019	10.4	46.2	
V3	1.00000 *		3	2.00307	10.0	56.2
V4	1.00000 *	4	1.70608	8.5	64.8	
V5	1.00000 *		5	.95894	4.8	69.5
V6	1.00000 *	6	.92950	4.6	74.2	
V7	1.00000 *		7	.66562	3.3	77.5
V8	1.00000 *		8	.60367	3.0	80.5
V9	1.00000 *		9	.50656	2.5	83.1
V10	1.00000 *		10	.46449	2.3	85.4
V11	1.00000 *	11	.43889	2.2	87.6	
V12	1.00000 *	12	.40188	2.0	89.6	
V13	1.00000 *		13	.36919	1.8	91.4
V14	1.00000 *	14	.35659	1.8	93.2	
V15	1.00000 *		15	.31607	1.6	94.8
V16	1.00000 *	16	.31201	1.6	96.4	
V17	1.00000 *		17	.27654	1.4	97.8
V18	1.00000 *	18	.24334	1.2	99.0	
V19	1.00000 *	19	.12214	.6	99.6	
V20	1.00000 *	20	.08431	.4	100.0	

PC extracted 4 factors.

Factor Matrix:

	Factor 1	Factor 2	Factor 3	Factor 4
V1	.62239	.07541	.51292	.31810
V2	.27928	.09833	.52455	.28471
V3	.60140	.42560	-.22747	-.01082
V4	.62897	.38995	-.13743	.09472
V5	.56140	.37371	-.37829	-.08028
V6	.75767	-.11791	.04659	.06431
V7	.30299	.11931	.54764	.34061
V8	.68699	.14229	.51192	.26757
V9	.54026	.64414	-.18498	.01717
V10	.57652	.53672	-.31832	-.04742
V11	.59297	-.39889	-.28728	.33989
V12	.55335	-.30705	-.34134	.20413
V13	.62180	-.10140	.05406	-.45090
V14	.67742	-.14175	.24733	-.24636
V15	.62298	-.01530	.13739	-.44221
V16	.74387	-.11085	-.19218	.13448
V17	.50396	-.48015	-.35074	.21332
V18	.66292	-.43235	-.19912	.32489
V19	.59010	-.27121	.18528	-.50463
V20	.61204	-.23087	.18833	-.52294

Final Statistics:

Variable	Communality *	Factor	Eigenvalue	Pct of Var	Cum Pct
V1	.75734 *	1	7.16093	35.8	35.8
V2	.44387 *	2	2.08019	10.4	46.2
V3	.59467 *	3	2.00307	10.0	56.2
V4	.57552 *	4	1.70608	8.5	64.8
V5	.60438 *				
V6	.59427 *				
V7	.52196 *				
V8	.82587 *				
V9	.74132 *				
V10	.72402 *				
V11	.70878 *				
V12	.55865 *				
V13	.60315 *				
V14	.60086 *				
V15	.60276 *				
V16	.62064 *				
V17	.65304 *				
V18	.77158 *				
V19	.71075 *				
V20	.73683 *				

Reproduced Correlation Matrix:

	V1	V2	V3	V4	V5
V1	.75734*	-.19944	.03376	.02245	-.07278
V2	.54086	.44387*	-.04403	-.04762	.15610
V3	.28628	.08741	.59467*	-.07345	-.14292
V4	.38051	.16888	.57445	.57552*	-.08778
V5	.15802	-.02775	.58359	.54322	.60438*
V6	.50703	.24276	.39419	.43026	.35851
V7	.58682	.48059	.10474	.19410	-.01982
V8	.78600	.55056	.35437	.44258	.22372
V9	.29541	.12208	.64095	.61804	.61263
V10	.22094	.03332	.64806	.61116	.64846
V11	.29974	.07246	.24851	.28909	.26521
V12	.21110	.00342	.27754	.29455	.30864
V13	.26365	.06367	.32337	.30141	.32693
V14	.45943	.23485	.29347	.31347	.25354
V15	.31639	.11865	.34168	.32510	.32755
V16	.39882	.13433	.44244	.46379	.43808
V17	.16541	-.02971	.17620	.19815	.21904
V18	.38120	.13068	.25645	.30650	.25983
V19	.28133	.09165	.20277	.19213	.20035
V20	.29377	.09814	.23264	.21951	.22806

	V6	V7	V8	V9	V10
V1	-.03440	-.19449	.11018	-.01022	-.02917
V2	-.05055	-.03438	-.17774	.02013	.02228
V3	-.02286	-.01690	-.00234	-.04009	-.08607
V4	-.07688	-.08561	.00641	-.08639	-.07990
V5	.04826	.08950	-.04907	-.07166	-.06129
V6	.59427*	-.01463	.01301	-.06228	.00159
V7	.26292	.52196*	-.13589	.01785	.04006
V8	.54480	.59661	.82587*	-.02801	.00502
V9	.32588	.14510	.37271	.74132*	-.05850
V10	.35565	.04825	.29680	.71527	.72402*
V11	.50478	.09052	.29448	.12240	.20310
V12	.45268	.01362	.21634	.16782	.25320
V13	.45659	.05233	.31977	.25288	.30823
V14	.52566	.23988	.50591	.22470	.24742
V15	.45178	.11156	.37782	.29371	.32818
V16	.57637	.15272	.43286	.36834	.42416
V17	.43582	-.02401	.15542	.03153	.13437
V18	.56487	.15089	.37889	.12207	.19812
V19	.45526	.07602	.32663	.10117	.15959
V20	.46609	.08292	.34411	.13813	.19379

	V11	V12	V13	V14	V15
V1	-.03510	.00067	-.01319	-.00728	-.00605
V2	.08387	-.00689	.05657	-.02141	.01245
V3	.00118	-.01900	-.04599	.00454	-.04506
V4	-.01746	-.03271	.00368	.08052	-.00523
V5	.03158	-.02666	.01537	-.01601	.02418
V6	-.10869	-.07393	-.05509	-.06005	.02843
V7	-.01201	.09686	.02783	-.08952	.04215
V8	-.04463	.01789	-.01605	-.02350	-.01613
V9	.02657	.03432	.01783	-.00221	-.04536
V10	.02581	.00504	-.00982	-.00129	-.02855
V11	.70878*	-.15192	.09523	.03444	-.04426
V12	.61804	.55865*	-.08011	-.04231	.10567
V13	.24036	.26471	.60315*	-.07068	-.13478
V14	.30344	.28366	.56005	.60086*	-.07689
V15	.18573	.21225	.59574	.56711	.60276*
V16	.58622	.53870	.40275	.43896	.37924
V17	.66362	.58956	.24690	.27015	.17878
V18	.73318	.63386	.29878	.38107	.24857
V19	.23334	.24355	.63198	.60834	.62038
V20	.22316	.23853	.64995	.62275	.64194

	V16	V17	V18	V19	V20
V1	.01437	-.00897	-.01252	-.00012	-.02893
V2	-.05049	.05584	-.00524	.00437	.03380
V3	-.03613	.00844	.02288	.04089	.02617
V4	-.04066	.01773	.01933	-.00942	-.02082
V5	-.01828	.01113	-.03907	-.03533	.00298
V6	.05929	.02973	-.07453	-.08467	-.00945
V7	-.01693	.05994	-.03756	.04761	.03442
V8	.01592	-.01144	-.02019	-.00956	-.00756
V9	-.03449	.01697	.03884	.05338	.02973
V10	-.04136	-.01354	.02944	.04755	.00122
V11	-.08578	-.16193	.10521	.03190	-.01367
V12	-.06340	.01371	-.12866	.00519	.03658
V13	-.00550	-.04400	.04290	-.04862	-.08342
V14	-.08812	-.05153	.07758	-.05599	-.07448
V15	.04238	.06509	-.10140	-.10248	-.07449
V16	.62064*	-.04293	-.07674	-.06163	.00622
V17	.52419	.65304*	-.15556	.00701	-.00074
V18	.62301	.68082	.77158*	.03903	.00462
V19	.36555	.25497	.30760	.71075*	-.07183
V20	.37435	.24169	.29815	.72257	.73683*

The lower left triangle contains the reproduced correlation matrix; the diagonal, reproduced communalities; and the upper right triangle residuals between the observed correlations and the reproduced correlations.

There are 63 (33.0%) residuals (above diagonal) with absolute values > 0.05.

VARIMAX rotation 1 for extraction 1 in analysis 1 - Kaiser Normalization.

VARIMAX converged in 5 iterations.

Rotated Factor Matrix:

	Factor 1	Factor 2	Factor 3	Factor 4
V1	.17532	.20945	.21649	.79741
V2	.00950	-.00640	.05012	.66425
V3	.72538	.16363	.17220	.10980
V4	.67615	.20732	.14026	.23599
V5	.72570	.20620	.17661	-.06349
V6	.28678	.48111	.41025	.33505
V7	.02804	.00875	.02174	.72154
V8	.26044	.18296	.27284	.80630
V9	.84163	-.00243	.07312	.16621
V10	.83274	.10795	.13440	.02915
V11	.11804	.82083	.09710	.10798
V12	.18952	.70927	.14022	-.00131
V13	.23045	.16916	.72100	.03979
V14	.15045	.23022	.65789	.30399
V15	.26308	.08785	.71484	.12178
V16	.37877	.60204	.28629	.18101
V17	.03655	.79218	.14758	-.04875
V18	.09446	.83357	.17816	.18997
V19	.03414	.17209	.82098	.07721
V20	.07503	.15085	.83740	.08494

**TABLE 5-2:
FACTOR ANALYSIS FOR SAUDI RESPONDENTS**

Correlation Matrix:

	V1	V2	V3	V4	V5	V6	V7
V1	1.00000						
V2	.53449	1.00000					
V3	.29527	.17401	1.00000				
V4	.37952	.28595	.50737	1.00000			
V5	.06907	.30822	.45731	.46659	1.00000		
V6	.49288	.48752	.40040	.38047	.43498	1.00000	
V7	.58685	.63063	.32780	.35241	.33599	.55049	1.00000
V8	.91690	.55886	.34397	.41652	.13894	.55012	.64267
V9	.24794	.22895	.60163	.52956	.54570	.28261	.33661
V10	.16184	.23740	.57073	.53910	.60026	.38953	.31857
V11	.26308	.38031	.26731	.28643	.32617	.43829	.30416
V12	.19529	.17783	.27790	.26462	.29265	.39377	.31424
V13	.23976	.32096	.28942	.31466	.35670	.41185	.30156
V14	.42793	.39443	.31251	.40096	.25435	.48440	.35953
V15	.27163	.31330	.26123	.29502	.32590	.44197	.38017
V16	.40263	.41666	.44905	.46753	.46943	.71092	.46485
V17	.14397	.19391	.19650	.20322	.22162	.42786	.22295
V18	.37189	.33953	.31752	.34260	.27266	.50892	.35484
V19	.19728	.20710	.11484	.08903	.01591	.24775	.23375
V20	.26763	.31282	.27894	.21764	.25417	.46960	.35553
	V8	V9	V10	V11	V12	V13	V14
V8	1.00000						
V9	.33719	1.00000					
V10	.27741	.65944	1.00000				
V11	.27969	.17723	.25930	1.00000			
V12	.23501	.20705	.29036	.46381	1.00000		
V13	.30183	.27663	.31361	.36051	.23823	1.00000	
V14	.47121	.22821	.25781	.37187	.27463	.49822	1.00000
V15	.32331	.22593	.27410	.13711	.33606	.45598	.45061
V16	.46004	.35515	.42556	.48784	.46484	.43248	.40720
V17	.12174	.04999	.14149	.46717	.56593	.18445	.18236
V18	.37569	.16576	.26432	.83159	.51919	.36013	.49344
V19	.23251	.04878	.13358	.20043	.19371	.48206	.41306
V20	.33898	.18291	.21743	.25442	.29177	.57353	.56161
	V15	V16	V17	V18	V19	V20	
V15	1.00000						
V16	.40993	1.00000					
V17	.21490	.43020	1.00000				
V18	.17254	.55275	.52363	1.00000			
V19	.35229	.16750	.21427	.27102	1.00000		
V20	.54275	.42684	.22367	.33981	.51200	1.00000	

Determinant of Correlation Matrix = .0000031

Kaiser-Meyer-Olkin Measure of Sampling Adequacy = .87864

Bartlett Test of Sphericity = 4779.1903, Significance = .00000

Anti-image Correlation Matrix:

	V1	V2	V3	V4	V5	V6	V7
V1	.78330						
V2	-.11043	.88827					
V3	-.09232	.17431	.92576				
V4	-.10324	.03912	-.10011	.93224			
V5	.05145	-.13177	-.04087	-.12413	.89423		
V6	-.00834	-.02746	-.04443	.11443	-.15950	.92535	
V7	-.00438	-.36936	-.04096	.00687	-.11262	-.11099	.92542
V8	-.82760	-.04073	.04112	-.01159	.15533	-.12721	-.18387
V9	.03166	.01236	-.30150	-.13657	-.21972	.13083	-.05042
V10	.20030	-.02824	-.18633	-.19039	-.23949	-.10133	.02976
V11	.07036	-.23921	-.00266	.03628	-.09892	.00321	.07176
V12	.06153	.14843	.02220	.04318	-.01408	.08206	-.11040
V13	.01727	-.01438	.02329	-.04204	-.12313	.01544	.05468
V14	.00104	-.11443	-.03534	-.19220	-.01289	-.11284	.12283
V15	-.03223	-.01853	.01309	-.05138	-.08872	-.06677	-.07991
V16	.03228	-.05252	-.07646	-.12869	-.05759	-.38417	.02350
V17	-.07396	-.05252	-.03695	-.08666	-.01108	-.21143	.02501
V18	-.11252	.14473	-.03469	-.04071	.05775	-.01878	-.06108
V19	.00692	-.00458	.01934	.07426	.19782	.02828	-.07035
V20	.10156	-.00616	-.08206	.10366	-.02013	-.08327	-.03839

	V8	V9	V10	V11	V12	V13	V14
V8	.80393						
V9	-.11889	.87845					
V10	-.14697	-.31556	.87985				
V11	-.01815	-.01987	.02375	.81068			
V12	-.06878	-.03411	-.08035	-.07237	.88685		
V13	-.01166	-.05068	.00256	-.14901	.06993	.91668	
V14	-.07028	.01660	.06123	.07997	.00157	-.09658	.90679
V15	.02443	.04431	-.00902	.04455	-.19757	-.11779	-.16261
V16	-.05588	-.00985	-.00917	.00689	-.09899	-.11930	.11362
V17	.15799	.05567	.09062	-.02545	-.36818	.07096	.15440
V18	.04051	.08643	-.04178	-.70979	-.12696	.04056	-.27263
V19	-.00737	.02767	-.13786	.02794	.01981	-.28951	-.11357
V20	-.06801	.00430	.08375	.08586	-.02810	-.23024	-.22329

	V15	V16	V17	V18	V19	V20
V15	.91454					
V16	-.08106	.93313				
V17	-.03074	-.06267	.83942			
V18	.19112	-.14629	-.16393	.81667		
V19	-.08332	.14664	-.14988	-.05677	.82312	
V20	-.22041	-.08720	.01815	-.05148	-.24160	.90378

Initial Statistics:

Variable	Communality	* Factor	Eigenvalue	Pct of Var	Cum Pct
	*				
V1	1.00000	*	1	7.73056	38.7
V2	1.00000	*	2	2.07441	10.4
V3	1.00000	*	3	1.83892	9.2
V4	1.00000	*	4	1.58818	7.9
V5	1.00000	*	5	.93724	4.7
V6	1.00000	*	6	.82717	4.1
V7	1.00000	*	7	.67676	3.4
V8	1.00000	*	8	.57366	2.9
V9	1.00000	*	9	.50740	2.5
V10	1.00000	*	10	.46209	2.3
V11	1.00000	*	11	.41447	2.1
V12	1.00000	*	12	.37787	1.9
V13	1.00000	*	13	.35568	1.8
V14	1.00000	*	14	.33004	1.7
V15	1.00000	*	15	.31610	1.6
V16	1.00000	*	16	.29008	1.5
V17	1.00000	*	17	.27842	1.4
V18	1.00000	*	18	.22263	1.1
V19	1.00000	*	19	.12987	.6
V20	1.00000	*	20	.06846	.3

PC extracted 4 factors.

Factor Matrix:

	Factor 1	Factor 2	Factor 3	Factor 4
V1	.62067	-.23273	-.53154	-.36701
V2	.61747	-.18649	-.31452	-.21076
V3	.60025	.47979	.00014	.03731
V4	.62876	.40242	-.07952	-.05029
V5	.57537	.52280	.17987	.11702
V6	.78531	-.09495	.00839	-.09376
V7	.68890	-.08312	-.33336	-.20319
V8	.69011	-.16857	-.53620	-.29376
V9	.53481	.65075	-.13883	.06242
V10	.58738	.60104	.03969	.11389
V11	.61390	-.17167	.46271	-.29174
V12	.55696	-.07749	.47917	-.12244
V13	.61832	-.13050	.03337	.48302
V14	.67168	-.24148	-.10086	.24095
V15	.57556	-.11009	-.09525	.44782
V16	.77556	.04106	.15455	-.10845
V17	.46704	-.20523	.57900	-.20589
V18	.68279	-.24087	.41906	-.28136
V19	.40752	-.42597	.00399	.50246
V20	.61244	-.29107	-.02034	.51030

Final Statistics:

Variable	Communality *	Factor	Eigenvalue	Pct of Var	Cum Pct
V1	.85663 *	1	7.73056	38.7	38.7
V2	.55940 *	2	2.07441	10.4	49.0
V3	.59189 *	3	1.83892	9.2	58.2
V4	.56613 *	4	1.58818	7.9	66.2
V5	.65041 *				
V6	.63459 *				
V7	.63391 *				
V8	.87847 *				
V9	.73267 *				
V10	.72081 *				
V11	.70556 *				
V12	.56080 *				
V13	.63378 *				
V14	.57770 *				
V15	.55300 *				
V16	.63882 *				
V17	.63788 *				
V18	.77898 *				
V19	.60001 *				
V20	.72063 *				

Reproduced Correlation Matrix:

	V1	V2	V3	V4	V5
V1	.85663*	-.13669	.04815	.02220	-.02781
V2	.67118	.55940*	-.09925	-.06285	.13168
V3	.24713	.27325	.59189*	-.06124	-.14328
V4	.35732	.34880	.56860	.56613*	-.08537
V5	.09688	.17654	.60059	.55196	.65041*
V6	.53947	.51974	.42233	.45961	.39274
V7	.69869	.58855	.36601	.43643	.26917
V8	.86038	.68812	.32233	.42349	.17811
V9	.23137	.23937	.63555	.60604	.63026
V10	.16179	.21411	.64520	.60231	.67265
V11	.28211	.32704	.27531	.29479	.31256
V12	.15396	.23346	.29264	.28706	.35180
V13	.21913	.29383	.32656	.30931	.35006
V14	.43827	.44072	.29629	.32105	.27027
V15	.26912	.31150	.30936	.30264	.30887
V16	.42946	.44548	.48121	.49733	.48280
V17	.10544	.18795	.17428	.17538	.24148
V18	.36036	.39402	.28384	.31320	.30938
V19	.16554	.22392	.05898	.05922	.07129
V20	.27138	.33129	.24700	.24390	.25626
	V6	V7	V8	V9	V10
V1	-.04658	-.11184	.05652	.01657	.00005
V2	-.03222	.04208	-.12926	-.01043	.02329
V3	-.02194	-.03820	.02165	-.03392	-.07447
V4	-.07914	-.08403	-.00697	-.07649	-.06320
V5	.04224	.06682	-.03917	-.08456	-.07239
V6	.63459*	-.01466	-.03089	-.06858	-.00433
V7	.56515	.63391*	-.08520	-.01132	.00026
V8	.58100	.72787	.87847*	.02171	.02811
V9	.35119	.34793	.31548	.73267*	-.04742
V10	.39386	.31831	.24930	.70686	.72081*
V11	.52964	.34222	.29020	.13416	.24255
V12	.46024	.25527	.17646	.17328	.28564
V13	.45296	.32754	.28892	.27128	.34109
V14	.52697	.46746	.48754	.23112	.27283
V15	.41966	.34641	.33528	.27735	.31912
V16	.61662	.50138	.47728	.41327	.47401
V17	.41042	.18762	.10693	.02299	.15051
V18	.58897	.40787	.36975	.13267	.24087
V19	.31340	.21272	.20329	-.02845	.04072
V20	.46058	.34919	.33271	.17280	.24210

	V11	V12	V13	V14	V15
V1	-.01903	.04133	.02063	-.01034	.00251
V2	.05327	-.05562	.02713	-.04629	.00181
V3	-.00801	-.01474	-.03715	.01622	-.04813
V4	-.00837	-.02244	.00535	.07991	-.00762
V5	.01361	-.05915	.00664	-.01591	.01703
V6	-.09135	-.06648	-.04111	-.04257	.02231
V7	-.03806	.05897	-.02597	-.10792	.03376
V8	-.01051	.05855	.01291	-.01633	-.01197
V9	.04307	.03377	.00535	-.00291	-.05142
V10	.01675	.00471	-.02748	-.01502	-.04502
V11	.70556*	.14884	.08399	.03504	-.06040
V12	.61266	.56080*	.07312	-.04035	.10744
V13	.27652	.31134	.63378*	-.06163	-.12739
V14	.33684	.31498	.55985	.57770*	-.08007
V15	.19752	.22862	.58337	.53068	.55300*
V16	.57222	.51611	.42696	.46929	.37857
V17	.64993	.57868	.23544	.25526	.14406
V18	.73650	.63420	.33170	.40672	.25359
V19	.17856	.20037	.55040	.49725	.50608
V20	.26766	.29143	.66248	.60666	.61500

	V16	V17	V18	V19	V20
V1	-.02682	.03852	.01153	.03174	-.00375
V2	-.02882	.00596	-.05449	-.01681	-.01847
V3	-.03216	.02223	.03368	.05585	.03194
V4	-.02979	.02784	.02939	.02981	-.02626
V5	-.01337	-.01986	-.03671	-.05537	-.00210
V6	.09430	.01744	-.08005	-.06565	.00902
V7	-.03653	.03533	-.05303	.02103	.00634
V8	-.01725	.01481	.00594	.02922	.00626
V9	-.05812	.02700	.03308	.07723	.01011
V10	-.04844	-.00901	.02345	.09286	-.02467
V11	-.08438	-.18276	.09509	.02187	-.01323
V12	-.05126	-.01275	-.11500	-.00666	.00034
V13	.00551	-.05100	.02843	-.06834	-.08895
V14	-.06210	-.07289	.08672	-.08419	-.04505
V15	.03136	.07084	-.08105	-.15378	-.07225
V16	.63882*	-.03541	-.06217	-.07718	.02229
V17	.46560	.63788*	-.14525	.03766	-.00527
V18	.61493	.66889	.77898*	.02987	.00363
V19	.24469	.17661	.24115	.60001*	-.11789
V20	.40455	.22893	.33617	.62990	.72063*

The lower left triangle contains the reproduced correlation matrix; the diagonal, reproduced communalities; and the upper right triangle residuals between the observed correlations and the reproduced correlations.

There are 68 (35.0%) residuals (above diagonal) with absolute values > 0.05.

VARIMAX rotation 1 for extraction 1 in analysis 1 - Kaiser Normalization.

VARIMAX converged in 6 iterations.

Rotated Factor Matrix:

	Factor 1	Factor 2	Factor 3	Factor 4
V1	.07478	.91068	.09792	.11004
V2	.13105	.68092	.18987	.20621
V3	.71953	.17974	.16141	.12573
V4	.65791	.30799	.16711	.10251
V5	.75318	-.00026	.24395	.15368
V6	.30915	.47896	.44825	.32968
V7	.25641	.70160	.18236	.20655
V8	.17319	.90008	.08539	.17617
V9	.83424	.18179	-.02628	.05456
V10	.82515	.08033	.12652	.13218
V11	.13550	.20033	.79767	.10387
V12	.20597	.05619	.69622	.17465
V13	.25907	.11271	.18031	.72211
V14	.16377	.37099	.22276	.60301
V15	.25020	.18623	.07092	.67133
V16	.41899	.34988	.52508	.25523
V17	.04210	.01395	.78959	.11161
V18	.11267	.27829	.81178	.17279
V19	-.09829	.08575	.12083	.75392
V20	.12208	.17279	.16658	.80506

TABLE 5-3
FACTOR ANALYSIS FOR UAE RESPONDENTS

Correlation Matrix:

	V1	V2	V3	V4	V5	V6	V7
V1	1.00000						
V2	.34650	1.00000					
V3	.33310	.06873	1.00000				
V4	.41088	.13890	.50737	1.00000			
V5	.09576	.14729	.45146	.46100	1.00000		
V6	.48375	.21356	.39471	.37532	.42897	1.00000	
V7	.39413	.44856	.09928	.11702	.07923	.24782	1.00000
V8	.89631	.37947	.36767	.45898	.18755	.56857	.46184
V9	.28600	.15163	.60126	.52878	.54019	.27369	.16644
V10	.20417	.07779	.56996	.53818	.59427	.38168	.09662
V11	.28296	.20092	.26761	.28615	.32008	.42996	.11498
V12	.21339	.01888	.27719	.26459	.29521	.40164	.11099
V13	.25316	.13391	.28682	.30809	.34954	.41049	.08350
V14	.44248	.20284	.27857	.38371	.21907	.44619	.15929
V15	.29849	.11620	.29801	.33389	.38277	.44777	.15240
V16	.44891	.11880	.44317	.46232	.46314	.70973	.15177
V17	.13859	.03328	.19638	.20359	.22465	.43568	.02155
V18	.38703	.13875	.31147	.33689	.26766	.50734	.12613
V19	.30304	.09888	.29255	.23795	.24260	.41176	.12283
V20	.26443	.12749	.25295	.20718	.23374	.45528	.12894
	V8	V9	V10	V11	V12	V13	V14
V8	1.00000						
V9	.34718	1.00000					
V10	.31476	.65854	1.00000				
V11	.28421	.17947	.25832	1.00000			
V12	.23943	.20189	.28843	.45714	1.00000		
V13	.30834	.26763	.30606	.35295	.23874	1.00000	
V14	.47517	.21392	.22280	.34895	.26422	.43468	1.00000
V15	.35099	.26134	.30227	.17720	.31722	.44698	.42488
V16	.48873	.34582	.41736	.47920	.47317	.42813	.38041
V17	.12819	.04607	.14044	.46075	.57113	.18968	.17046
V18	.37392	.15971	.25667	.82602	.52298	.35739	.47035
V19	.33662	.20112	.23950	.31834	.37309	.57023	.59614
V20	.33347	.16671	.18651	.24326	.25597	.51240	.51370
	V15	V16	V17	V18	V19	V20	
V15	1.00000						
V16	.45482	1.00000					
V17	.16847	.43876	1.00000				
V18	.18912	.55124	.52770	1.00000			
V19	.53479	.39153	.27909	.38715	1.00000		
V20	.50590	.42183	.26205	.33843	.63751	1.00000	

Determinant of Correlation Matrix = .0000075

Kaiser-Meyer-Olkin Measure of Sampling Adequacy = .87321

Bartlett Test of Sphericity = 4442.8529, Significance = .00000

Anti-image Correlation Matrix:

	V1	V2	V3	V4	V5	V6	V7
V1	.78060						
V2	-.05794	.78725					
V3	-.08069	.06898	.93523				
V4	-.03544	.01575	-.11519	.92552			
V5	.13022	-.12494	-.03353	-.12652	.90511		
V6	.07351	-.01379	-.05416	.12609	-.16173	.91125	
V7	.05154	-.32529	.03550	.07491	.00360	-.04017	.81521
V8	-.80235	-.07191	.02877	-.10913	.05707	-.23982	-.22478
V9	-.07015	-.03716	-.30757	-.14306	-.22376	.11556	-.06966
V10	.17667	.05028	-.17316	-.16743	-.22387	-.07901	.03146
V11	.03815	-.17149	.02389	.03745	-.10535	.01722	.02046
V12	.05470	.09206	.01210	.03777	-.01343	.05789	-.07411
V13	.03214	-.02525	.03444	-.04584	-.07271	-.02529	.05333
V14	-.02128	-.07043	.03086	-.19299	.01021	-.09531	.06813
V15	-.05879	.02048	.00531	-.08588	-.15868	-.07879	-.03502
V16	-.09016	.08432	-.04738	-.10149	-.10708	-.37987	.04974
V17	-.03443	-.04142	-.01979	-.10838	-.01255	-.22131	.03886
V18	-.12303	.09976	-.05437	-.04702	.05326	-.04343	-.02001
V19	-.04384	.04967	-.06645	.11413	.04598	.04145	-.02028
V20	.12678	-.03216	-.03186	.08360	.02560	-.07466	.00049

	V8	V9	V10	V11	V12	V13	V14
V8	.79812						
V9	-.00591	.86895					
V10	-.14913	-.33655	.88856				
V11	.00380	-.02597	.00077	.81189			
V12	-.05037	-.04485	-.07077	-.01949	.88631		
V13	-.02250	-.03125	-.02858	-.11470	.08357	.93644	
V14	-.06683	.00236	.05875	.06842	.02602	-.00705	.90170
V15	.02504	.06052	-.00003	-.02354	-.15553	-.07997	-.08151
V16	-.00168	-.02037	-.00487	-.02341	-.10527	-.07756	.10249
V17	.12254	.07931	.07431	-.03015	-.37460	.06537	.15190
V18	.05139	.09775	-.03209	-.71166	-.15332	.00069	-.24142
V19	.02958	-.00138	-.03978	-.01857	-.14551	-.28042	-.31438
V20	-.09671	-.02325	.06277	.11324	.09692	-.16148	-.13665

	V15	V16	V17	V18	V19	V20
V15	.91078					
V16	-.12726	.93509				
V17	.07947	-.05699	.84189			
V18	.20418	-.11662	-.14885	.81313		
V19	-.20299	.05678	-.06952	.00890	.87836	
V20	-.17916	-.08392	-.09075	-.08902	-.30994	.89801

Initial Statistics:

Variable	Communality *	Factor	Eigenvalue	Pct of Var	Cum Pct
V1	1.00000 *	1	7.35463	36.8	36.8
V2	1.00000 *	2	2.01872	10.1	46.9
V3	1.00000 *	3	1.94750	9.7	56.6
V4	1.00000 *	4	1.57416	7.9	64.5
V5	1.00000 *	5	.96063	4.8	69.3
V6	1.00000 *	6	.87993	4.4	73.7
V7	1.00000 *	7	.69022	3.5	77.1
V8	1.00000 *	8	.58242	2.9	80.0
V9	1.00000 *	9	.54288	2.7	82.8
V10	1.00000 *	10	.49719	2.5	85.2
V11	1.00000 *	11	.45729	2.3	87.5
V12	1.00000 *	12	.42092	2.1	89.6
V13	1.00000 *	13	.37111	1.9	91.5
V14	1.00000 *	14	.33623	1.7	93.2
V15	1.00000 *	15	.33455	1.7	94.8
V16	1.00000 *	16	.29702	1.5	96.3
V17	1.00000 *	17	.28050	1.4	97.7
V18	1.00000 *	18	.23214	1.2	98.9
V19	1.00000 *	19	.13846	.7	99.6
V20	1.00000 *	20	.08351	.4	100.0

PC extracted 4 factors.

Factor Matrix:

	Factor 1	Factor 2	Factor 3	Factor 4
V1	.62459	.09954	.56869	.18051
V2	.29728	.12551	.54646	.20235
V3	.61673	.40510	-.23301	.03306
V4	.63875	.38272	-.11330	.08151
V5	.58314	.34213	-.39710	-.01639
V6	.76980	-.10759	.05441	.07112
V7	.31016	.14633	.59666	.21197
V8	.69119	.16286	.55137	.13261
V9	.54381	.63433	-.19616	.01430
V10	.59218	.51221	-.34326	.02810
V11	.61396	-.36088	-.15522	.39428
V12	.56968	-.31587	-.28354	.23937
V13	.61419	-.12029	-.04432	-.40954
V14	.64965	-.17734	.21766	-.28567
V15	.60525	-.00684	.01960	-.47127
V16	.78009	-.07835	-.11824	.10388
V17	.47115	-.47103	-.30554	.33056
V18	.68412	-.42049	-.10785	.36146
V19	.64252	-.29141	.03585	-.48633
V20	.59693	-.27474	.08311	-.50263

Final Statistics:

Variable	Communality * *	Factor	Eigenvalue	Pct of Var	Cum Pct
V1	.75601 *	1	7.35463	36.8	36.8
V2	.44369 *	2	2.01872	10.1	46.9
V3	.59984 *	3	1.94750	9.7	56.6
V4	.57395 *	4	1.57416	7.9	64.5
V5	.61506 *				
V6	.61218 *				
V7	.51855 *				
V8	.82586 *				
V9	.73679 *				
V10	.73165 *				
V11	.68673 *				
V12	.56201 *				
V13	.56139 *				
V14	.58248 *				
V15	.58885 *				
V16	.63945 *				
V17	.64648 *				
V18	.78712 *				
V19	.73556 *				
V20	.69135 *				

Reproduced Correlation Matrix:

	V1	V2	V3	V4	V5
V1	.75601*	-.19896	.03412	.02356	-.07372
V2	.54546	.44369*	-.04481	-.05360	.15131
V3	.29898	.11354	.59984*	-.07070	-.13876
V4	.38733	.19250	.57807	.57395*	-.08607
V5	.16949	-.00402	.59022	.54707	.61506*
V6	.51388	.25947	.42084	.45016	.38932
V7	.58587	.47952	.11854	.20379	-.00948
V8	.78542	.55405	.36816	.45216	.23765
V9	.29383	.13698	.63853	.61352	.61180
V10	.23072	.05844	.65362	.61547	.65641
V11	.33045	.13219	.28166	.30378	.28973
V12	.20634	.02321	.29737	.29463	.33281
V13	.27252	.06040	.32685	.31792	.34131
V14	.46033	.23201	.26866	.29915	.23641
V15	.30343	.09442	.35036	.34335	.35055
V16	.43095	.17848	.48035	.49016	.47334
V17	.13330	-.01913	.18188	.18224	.22950
V18	.38936	.16481	.28866	.31773	.29198
V19	.30491	.07562	.25378	.25518	.26871
V20	.30202	.08668	.22086	.22575	.22933

	V6	V7	V8	V9	V10
V1	-.03013	-.19174	.11089	-.00783	-.02655
V2	-.04591	-.03096	-.17458	.01464	.01935
V3	-.02614	-.01926	-.00049	-.03727	-.08366
V4	-.07484	-.08678	.00682	-.08474	-.07729
V5	.03965	.08871	-.05011	-.07161	-.06214
V6	.61218*	-.02274	.01459	-.06704	-.00239
V7	.27055	.51855*	-.13346	.01895	.03686
V8	.55398	.59531	.82586*	-.02575	.00758
V9	.34072	.14748	.37293	.73679*	-.05614
V10	.38407	.05977	.30719	.71468	.73165*
V11	.53105	.12858	.33230	.14105	.24309
V12	.47412	.01204	.21773	.16848	.27962
V13	.45421	.05964	.32619	.26054	.30580
V14	.51071	.24486	.50228	.19402	.21113
V15	.43421	.09852	.36554	.31422	.33495
V16	.60989	.18196	.47501	.39920	.46533
V17	.42025	-.03503	.12431	.02209	.15190
V18	.59171	.16293	.39285	.13163	.23692
V19	.49333	.07495	.35192	.15058	.20525
V20	.45785	.08799	.34702	.12685	.17011

	V11	V12	V13	V14	V15
V1	-.04749	.00705	-.01936	-.01785	-.00494
V2	.06873	-.00433	.07350	-.02917	.02178
V3	-.01405	-.02018	-.04003	.00991	-.05235
V4	-.01763	-.03004	-.00982	.08456	-.00946
V5	.03035	-.03760	.00823	-.01734	.03222
V6	-.10108	-.07248	-.04372	-.06452	.01356
V7	-.01361	.09896	.02386	-.08557	.05388
V8	-.04808	.02170	-.01785	-.02711	-.01455
V9	.03842	.03341	.00709	.01990	-.05288
V10	.01523	.00881	.00026	.01166	-.03268
V11	.68673*	-.14500	.08705	.03251	-.00801
V12	.60215	.56201*	-.06368	-.03179	.08863
V13	.26590	.30242	.56139*	-.09302	-.11772
V14	.31644	.29601	.52769	.58248*	-.10843
V15	.18522	.22860	.56470	.53331	.58885*
V16	.56653	.52755	.45125	.46527	.42141
V17	.63701	.58295	.22419	.22868	.12661
V18	.73102	.63966	.32751	.39228	.24448
V19	.30233	.33150	.62727	.61583	.62077
V20	.25456	.28296	.60184	.59819	.60167

	V16	V17	V18	V19	V20
V1	.01796	.00529	-.00233	-.00187	-.03760
V2	-.05968	.05241	-.02607	.02327	.04081
V3	-.03718	.01450	.02282	.03877	.03209
V4	-.02784	.02136	.01916	-.01723	-.01857
V5	-.01020	-.00485	-.02432	-.02611	.00441
V6	.09983	.01542	-.08437	-.08157	-.00257
V7	-.03019	.05658	-.03680	.04789	.04095
V8	.01371	.00388	-.01893	-.01530	-.01355
V9	-.05338	.02398	.02808	.05055	.03986
V10	-.04796	-.01147	.01975	.03425	.01640
V11	-.08733	-.17627	.09499	.01600	-.01130
V12	-.05438	-.01183	-.11668	.04158	-.02698
V13	-.02311	-.03452	.02988	-.05705	-.08944
V14	-.08486	-.05822	.07807	-.01969	-.08449
V15	.03341	.04186	-.05536	-.08598	-.09577
V16	.63945*	-.03615	-.06568	-.07777	-.00331
V17	.47491	.64648*	-.14513	.01082	.04294
V18	.61692	.67282	.78712*	.00471	.00518
V19	.46930	.26827	.38245	.73556*	-.07351
V20	.42514	.21910	.33325	.71102	.69135*

The lower left triangle contains the reproduced correlation matrix; the diagonal, reproduced communalities; and the upper right triangle residuals between the observed correlations and the reproduced correlations. There are 66 (34.0%) residuals (above diagonal) with absolute values > 0.05.

VARIMAX rotation 1 for extraction 1 in analysis 1 - Kaiser Normalization.

VARIMAX converged in 5 iterations.

Rotated Factor Matrix:

	Factor 1	Factor 2	Factor 3	Factor 4
V1	.17471	.23391	.18872	.79697
V2	.03089	.02648	.02288	.66446
V3	.72384	.17302	.17466	.12432
V4	.67121	.16637	.18853	.24539
V5	.72590	.19441	.21749	-.05503
V6	.30858	.40677	.48337	.34329
V7	.03253	.02518	.00720	.71889
V8	.26173	.28755	.16564	.80451
V9	.83805	.08424	-.01779	.16445
V10	.83562	.12085	.13117	.03978
V11	.14131	.12290	.79119	.16024
V12	.19768	.19225	.69709	-.00592
V13	.23652	.68681	.17774	.04643
V14	.10944	.65376	.21595	.31060
V15	.28600	.70312	.05375	.09894
V16	.40911	.36095	.54306	.21651
V17	.04439	.11021	.79275	-.06253
V18	.11325	.20926	.82953	.20587
V19	.08844	.81997	.22493	.06927
V20	.05614	.80738	.16809	.08989

CHAPTER SIX

GCC CONSUMERS' ATTITUDES TOWARDS VISITING AUSTRALIAN TOURIST RESORTS: DISCRIMINANT ANALYSIS

ABSTRACT

This chapter conducts a discriminant analysis to determine which, if any, of the four factors extracted in the previous chapter predict GCC consumers' interest to visit Australian resorts to a statistically significant degree. Four factor scores are calculated for each respondent. The factor scores are then used as explanatory variables in the discriminant analysis.

Discriminant analysis of factor scores suggests that the "cost factor" and the "image factor" are the most important predictors that discriminate between GCC consumers who expressed interest to visit Australia as a tourist resort and those who did not. The "cost factor" seems to be relatively more important in discriminating between the two groups of consumers in those GCC countries with relatively lower standard of living (e.g. Saudi Arabia) while the "image factor" plays a stronger role in discriminating between the two groups in the relatively richer GCC states (e.g. the United Arab Emirates).

Discriminant analysis shows that it is possible to separate the two groups of GCC consumers (those interested to visit Australia as a tourist resort and those who are not) on the basis of some demographic variables, attitude towards travel and importance of family vacation.

GCC CONSUMERS' ATTITUDES TOWARDS VISITING AUSTRALIAN TOURIST RESORTS: DISCRIMINANT ANALYSIS

6.1 INTRODUCTION

Factor Analysis was performed in the previous chapter with the primary goal of data reduction. The principal component method, using varimax rotation, reduced the 20 variables to four factors having eigenvalues greater than one. This chapter conducts a discriminant analysis to determine which, if any, of the four factors predict GCC consumers' interest to visit Australian resorts to a statistically significant degree. Four factor scores are calculated for each respondent. The factor scores are then used as explanatory variables in discriminant analysis.

This chapter also uses discriminant analysis to determine the salient characteristics of GCC consumers that expressed interest to visit Australia as a tourist resort using the survey data for the three samples covering Kuwait, Saudi Arabia and the United Arab Emirates.

This chapter is divided into four sections. Section one briefly reviews the methodology. Discriminant analysis, using factor scores as explanatory variables, is conducted in section two. Section three attempts to find out how the GCC consumers who expressed interest to visit Australia differ in their demographic profile from those who are not interested. Finally, section four summarizes the main conclusions of the chapter.

6.2. METHODOLOGY

Discriminant analysis is a multivariate statistical technique used to identify the relative importance of variables that indicate the respondents belong to the same or different group by analyzing data with a categorical dependent variable and interval scaled independent variables (Malhotra, et. al, 1996).

Suppose we have N consumers for which we have observations on K demographic variables and we observe that N_1 of them expressed interest to visit Australian tourist destinations and N_2 of the consumers did not express this interest, where $N_1 + N_2 = N$. We want to construct a linear function of the K variables that we can use to predict that a new consumer belongs to one of the two groups. This linear function is called the linear discriminant function.

Let us define a linear function

$$Z = \lambda_0 + \sum_{i=1}^k \lambda_i x_i$$

then it is intuitively clear that to get the best discrimination between the two groups, we would want to choose the λ_i so that the ratio (Haddah, 1992):

$$\frac{\text{between - group variance of } Z}{\text{within - group variance of } Z} \text{ is a maximum}$$

Fisher (1936) suggested an analogy between this problem and multiple regression analysis. He suggested that we define a dummy variable

$$y = \frac{n_2}{n_1 + n_2} \text{ if the observation belongs to the first group}$$

$$y = - \frac{n_1}{n_1 + n_2} \text{ if the observation belong to the second group}$$

If we estimate the multiple regression equation

$$y = \beta_0 + \beta_1 x_1 + \beta_2 x_2 + \dots + \beta_k x_k + v$$

and obtained the sum of squares RSS, then

$$\hat{\beta}_i = \frac{RSS}{n_1 + n_2 - 2}$$

Thus, once we have the regression coefficients and the residual sum of squares from the dummy dependent variable regression, we can very easily obtain the discriminant function coefficients (Maddala, 1992)

The technique can be generalized to more than two groups [Johnson & Nichern, 1982 and Joseph and Anderson, 1992], Mahotra et. al (1996) explained this derivation as follows:

Suppose there are G groups, $i = 1, 2, \dots, G$, each containing n_i observations on k independent variables x_1, x_2, \dots, x_k and assume the following notations.

$$N = \text{Total sample size} = \sum_{i=1}^G n_i$$

$W_i =$ Matrix of mean corrected sum of squares and cross-products for the i th group

$W =$ Matrix of pooled within-groups mean correlated sum of squares and cross-products

$B =$ Matrix of Between-groups mean corrected sum of squares and cross products

$T =$ Matrix of total mean corrected sum of squares and cross-products for all the N observations ($= W + B$)

$\bar{x}_i =$ Vector of means of observations in the i th group

$\bar{x} =$ Vector of grand means of the N observations

$\lambda =$ Ratio of between groups to within-group sums of squares

$b =$ Vector of discriminant coefficients or weights

then

$$T = \sum_{i=1}^G \sum_{j=1}^{n_i} (x_{ij} - \bar{x})(x_{ij} - \bar{x})'$$

$$W_i = \sum_{j=1}^{n_i} (x_{ij} - \bar{x}_i)(x_{ij} - \bar{x}_i)'$$

$$W = W_1 + W_2 + W_3 + \dots + W_G$$

$$B = T - W$$

Define the linear composite $D = b'_i x$ or

$$D = b_0 + b_1x_1 + b_2x_2 + \dots + b_k x_k$$

where D = discriminant score

b 's = discriminant coefficients or weights

x 's = predictor or independent variables.

Then with reference to D , the between-groups and within groups sums of squares are, respectively, given by $b'_i B b$ and $b'_i W b$. In order to maximally discriminate between the groups, the discriminant functions are estimated to maximise the between-group variability. The coefficients b are calculated to maximise λ , by solving

$$\text{Max } \lambda = \frac{b' B b}{b' W b}$$

Taking the partial derivative with respect to λ and setting it equal to zero, with some simplifications, yields

$$(B - \lambda W)b = 0$$

To solve for b , it is more convenient to pre-multiply by W^{-1} and solve the following characteristic equation:

$$(W^{-1} B - \lambda I) B = 0$$

The maximum value of λ is the largest eigenvalue of the matrix $W^{-1}B$ and b is the associated eigenvector (Malhotra et. al., 1996). The elements of b are the discriminant coefficients, or weights, associated with the first discriminant function. In general, it is possible to estimate up to smaller of $G - 1$ or k discriminant functions, each with its associated eigenvalue. The discriminant functions are estimated sequentially, i.e., the first discriminant function exhausts most of the between-group variability. The second function maximizes the between-group variation that was not explained by the first one, and so on.

6.3. Discriminant Analysis of Factor Scores:

Factor analysis was conducted to determine which, if any, of the four factors extracted in the previous chapter, predict the use of Australian tourist resorts by GCC consumers. Four factor scores were calculated for each respondent in each sample. The factor scores for the four factors were introduced in the discriminant analysis as the explanatory variables. The dependent variable is the respondents' answer to the question: would you be interested in visiting Australia?. The respondents were divided into two groups in each sample. Group one comprises those consumers who answered positively. The variable "visit" was given a value of 2 for this group of respondents. On the other hand, each respondent who answered "no" was assigned a value of 1 for the "visit" variable. Tables 6-1, 6-2 and 6-3 give the discriminant analysis results for the Kuwaiti, Saudi

and UAE samples respectively. The data in these tables would seem to suggest that:

1. The pooled within-groups correlation matrix, which is computed by averaging the separate covariance matrices for all groups, indicates very low correlations between the predictors. Hence, there is no problem of multicollinearity.
2. The significance of the univariate F ratios indicate that when the predictors are considered individually, only two factors (F_3 and F_4 in the case of Kuwait; and F_2 and F_4 in both Saudi Arabia and the United Arab Emirates) significantly discriminate between those GCC consumers who expressed interest to visit Australia and those who did not. The F values are calculated from a one-way ANOVA with the grouping variable serving as the categorical independent variable. Each predictor, in turn, serves as the metric-dependent variable in the ANOVA.
3. Because there are two groups, only one discriminant function is estimated for each sample. The Wilk's λ associated with the estimated function, in each sample, transforms to a chi-square which is significant beyond the .01 level. We must, therefore, reject the null hypothesis that, in the population, the means of all discriminant functions in all groups are equal.

4. The level of significance of Box's M suggests that we should reject the null hypothesis that, for each sample taken separately, the covariance matrices are equal.
5. The unstandardized discriminant coefficients give the following functions for the three samples:

Kuwait:

$$Z = -.509 + .033 \text{ Attractions} - .090 \text{ Convenience} + .695 \text{ Image} + .689 \text{ Cost}$$

Saudi Arabia:

$$Z = -.265 - .043 \text{ Attractions} + .022 \text{ Convenience} + .615 \text{ Image} + .763 \text{ Cost}$$

United Arab Emirates:

$$Z = -.563 - .022 \text{ Attractions} - .053 \text{ Convenience} + .852 \text{ Image} + .570 \text{ Cost}$$

6. The absolute magnitude of the standardized discriminant function coefficients, suggest that the "image" and "cost" factors are the most important predictors in discriminating between the two groups of consumers (those who expressed interest to visit Australia and those who did not).

7. Some idea of the relative importance of the predictors can be obtained by examining the structure correlations, also called canonical loadings or discriminant loadings. These simple correlations between each predictor and the discriminant function represent the variance that the predictor shares with the function.

The simple correlations between the predictors and the functions are listed in order of magnitude. It can be seen that for both Kuwaiti and Saudi consumers, the “cost” factor is the most important predictor followed by the “image” factor, though the coefficient of the “cost” factor is relatively higher for the Saudi sample. For the UAE consumers, the “image” factor is the most important predictor followed by the “cost” factor.

8. The group centroids, giving the value of the discriminant function evaluated at the group means suggest that group 2 (those who are interested in visiting Australia) has a positive value while group 1 (those not interested in visiting Australian resources) has a negative value in all three samples. Since the sign associated with the “cost factor” and the “image factor” in both the standardized and non-standardized discriminant functions, for all samples, is positive, this suggests that the GCC potential consumers attach heavy weight to cost and image.
9. The classification matrix, based on sample analysis gives a hit ratio of 84.2%, 93.5% and 81.8% for the Kuwaiti, Saudi and UAE samples respectively. We also calculated for each sample the Press’s Q statistic, which is given by:

$$Q = \{ N - (n * k) \}^2 / \{ N (k-1) \}$$

where:

N = Total sample size

n = Number of observations correctly classified

k = Number of groups

The calculations give a Q statistic equals 189.5; 291.5 and 155.9 for the Kuwaiti, Saudi and UAE samples respectively. The critical value at a significant level of .01 is 6.63. This suggests that the predictions are significantly better than chance.

Table 6-1
Discriminant Analysis of Factor Scores
(Kuwaiti Respondents)

On groups defined by VISIT : Would you be interested in visiting Australia?

385 (Unweighted) cases were processed.
0 of these were excluded from the analysis.
385 (Unweighted) cases will be used in the analysis.

Number of cases by group

	Number of cases		
VISIT	Unweighted	Weighted	Label
1	289	289.0	no
2	96	96.0	yes
Total	385	385.0	

Pooled within-groups correlation matrix

	FAC1_1	FAC2_1	FAC3_1	FAC4_1
FAC1_1	1.00000			
FAC2_1	.02951	1.00000		
FAC3_1	.04264	.06550	1.00000	
FAC4_1	.05495	.02920	.04022	1.00000

Wilks' Lambda (U-statistic) and univariate F-ratio
with 1 and 383 degrees of freedom

Variable	Wilks' Lambda	F	Significance
FAC1_1	.99548	1.7384	.1881
FAC2_1	.99975	.0953	.7578
FAC3_1	.80766	91.2115	.0000
FAC4_1	.79934	96.1466	.0000

Minimum tolerance level..... .00100

Canonical Discriminant Functions

Maximum number of functions..... 1
Minimum cumulative percent of variance... 100.00
Maximum significance of Wilks' Lambda.... 1.0000

Prior probabilities

Group	Prior	Label
1	.75065	no
2	.24935	yes
Total	1.00000	

Classification function coefficients
(Fisher's linear discriminant functions)

VISIT =	1 no	2 yes
FAC1_1	-.0471565	.0048756
FAC2_1	.0074947	-.1348495
FAC3_1	.0713710	1.1758446
FAC4_1	.0924356	1.1863349
(Constant)	-.2947680	-2.8377748

Canonical Discriminant Functions

Fcn	Eigenvalue	Pct of Variance	Cum Variance Pct	Canonical Corr	After Wilks' Fcn	Lambda	Chi-square	df	Sig
				: 0	678210	147.942	4	.0000	
1*	.4745	100.00	100.00	.5673	:				

* Marks the 1 canonical discriminant functions remaining in the analysis.

Standardized canonical discriminant function coefficients

	Function 1
FAC1_1	.03273
FAC2_1	-.08917
FAC3_1	.68474
FAC4_1	.70065

Structure matrix:

Pooled within-groups correlations between discriminating variables
and canonical discriminant functions
(Variables ordered by size of correlation within function)

	Function 1
FAC4_1	.72738
FAC3_1	.70847
FAC1_1	.09781
FAC2_1	-.02290

Unstandardized canonical discriminant function coefficients

	Function 1
FAC1_1	.0327659
FAC2_1	-.0896376
FAC3_1	.6955140
FAC4_1	.6888551
(Constant)	-.5093575

Canonical discriminant functions evaluated at group means (group centroids)

Group	Function 1
1	-.39597
2	1.19203

Test of Equality of Group Covariance Matrices Using Box's M

The ranks and natural logarithms of determinants printed are those
of the group covariance matrices.

Group Label		Rank	Log Determinant
1	no	4	.008441
2	yes	4	-.325026
Pooled within-groups covariance matrix		4	-.021606
Box's M	Approximate F	Degrees of freedom	Significance
20.17140	1.98408	10, 146854.1	.0308

Classification results -

		No. of	Predicted Group Membership	
Actual Group		Cases	1	2
-----		-----	-----	-----
Group	1	289	263	26
no			91.0%	9.0%
Group	2	96	35	61
yes			36.5%	63.5%

Percent of "grouped" cases correctly classified: 84.16%

Classification processing summary

- 385 (Unweighted) cases were processed.
- 0 cases were excluded for missing or out-of-range group codes.
- 0 cases had at least one missing discriminating variable.
- 385 (Unweighted) cases were used for printed output.

Table 6-2
Discriminant Analysis of Factor Scores
(Saudi Arabian Respondents)

On groups defined by VISIT Would you be interested in visiting Australia ?

385 (Unweighted) cases were processed.
0 of these were excluded from the analysis.
385 (Unweighted) cases will be used in the analysis.

Number of cases by group

Number of cases			
VISIT	Unweighted	Weighted	Label
1	325	325.0	no
2	60	60.0	yes
Total	385	385.0	

Pooled within-groups correlation matrix

	FAC1_1	FAC2_1	FAC3_1	FAC4_1
FAC1_1	1.00000			
FAC2_1	.07723	1.00000		
FAC3_1	.04769	.04130	1.00000	
FAC4_1	.02145	.12840	.04253	1.00000

Wilks' Lambda (U-statistic) and univariate F-ratio
with 1 and 383 degrees of freedom

Variable	Wilks' Lambda	F	Significance
FAC1_1	.99971	.1101	.7402
FAC2_1	.79506	98.7257	.0000
FAC3_1	.99777	.8567	.3552
FAC4_1	.84209	71.8232	.0000

Minimum tolerance level..... .00100

Canonical Discriminant Functions

Maximum number of functions..... 1
Minimum cumulative percent of variance... 100.00
Maximum significance of Wilks' Lambda.... 1.0000

Prior probabilities

Group	Prior	Label
1	.84416	no
2	.15584	yes
Total	1.00000	

Classification function coefficients
(Fisher's linear discriminant functions)

VISIT =	1 no	2 yes
FAC1_1	-.0090047	-.0840782
FAC2_1	.0013647	1.3221944
FAC3_1	.0415154	.0802380
FAC4_1	-.0131837	1.0506425
(Constant)	-.1703131	-3.3494434

Canonical Discriminant Functions

Fcn	Pct of Eigenvalue	Cum Variance	Canonical Pct	Corr	After Wilks' Fcn	Lambda	Chi-square	df	Sig
1*	.3962	100.00	100.00	.5327	: 0	.716205	127.174	4	.0000

* Marks the 1 canonical discriminant functions remaining in the analysis.

Standardized canonical discriminant function coefficients

Function 1	
FAC1_1	-.04342
FAC2_1	.73275
FAC3_1	.02169
FAC4_1	.59386

Structure matrix:

Pooled within-groups correlations between discriminating variables
and canonical discriminant functions
(Variables ordered by size of correlation within function)

Function 1	
FAC2_1	.80655
FAC4_1	.68794
FAC3_1	.07513
FAC1_1	.02694

Unstandardized canonical discriminant function coefficients

Function 1	
FAC1_1	-.0433701
FAC2_1	.7630453
FAC3_1	.0223701
FAC4_1	.6145741
(Constant)	-.2648399

Canonical discriminant functions evaluated at group means (group centroids)

Group	Function 1
1	-.26977
2	1.46123

Test of Equality of Group Covariance Matrices Using Box's M

The ranks and natural logarithms of determinants printed are those
of the group covariance matrices.

Group Label	Rank	Log Determinant
1 no	4	-.113119
2 yes	4	-1.426215
Pooled within-groups covariance matrix	4	-.237218

Box's M	Approximate F	Degrees of freedom	Significance
29.94259	2.91886	10,	48744.1 .0012

Classification results -

Actual Group		No. of Cases	Predicted Group Membership	
			1	2
-----		-----	-----	-----
Group no	1	325	319 98.2%	6 1.8%
Group yes	2	60	19 31.7%	41 68.3%

Percent of "grouped" cases correctly classified: 93.51%

Classification processing summary

- 385 (Unweighted) cases were processed.
- 0 cases were excluded for missing or out-of-range group codes.
- 0 cases had at least one missing discriminating variable.
- 385 (Unweighted) cases were used for printed output.

Table 6-3
Discriminant Analysis of Factor Scores
United Arab Emirates' Respondents

On groups defined by VISIT: Would you be interested in visiting Australia?

385 (Unweighted) cases were processed.
0 of these were excluded from the analysis.
385 (Unweighted) cases will be used in the analysis.

Number of cases by group

Number of cases		Weighted	Label
VISIT	Unweighted		
1	253	253.0	no
2	132	132.0	yes
Total	385	385.0	

Pooled within-groups correlation matrix

	FAC1_1	FAC2_1	FAC3_1	FAC4_1
FAC1_1	1.00000			
FAC2_1	.01197	1.00000		
FAC3_1	-.04521	-.01110	1.00000	
FAC4_1	.02558	-.02048	.02297	1.00000

Wilks' Lambda (U-statistic) and univariate F-ratio
with 1 and 383 degrees of freedom

Variable	Wilks' Lambda	F	Significance
FAC1_1	.99999	.0056	.9406
FAC2_1	.75361	125.2225	.0000
FAC3_1	.99893	.4095	.5226
FAC4_1	.84472	70.4058	.0000

Minimum tolerance level..... .00100

Canonical Discriminant Functions

Maximum number of functions..... 1
Minimum cumulative percent of variance... 100.00
Maximum significance of Wilks' Lambda.... 1.0000

Prior probabilities

Group	Prior	Label
1	.65714	no
2	.34286	yes
Total	1.00000	

Classification function coefficients
(Fisher's linear discriminant functions)

VISIT =	1 no	2 yes
FAC1_1	-.0034299	-.0372627
FAC2_1	.0293655	1.3239186
FAC3_1	.0124264	-.0676040
FAC4_1	.0330242	.8993285
(Constant)	-.4209263	-2.2895768

Canonical Discriminant Functions

Fcn	Eigenvalue	Pct of Variance	Cum Variance Pct	Canonical Corr	After Wilks' Fcn	Lambda	Chi-square	df	Sig
1*	.5226	100.00	100.00	.5859	: 0	.656762	160.185	4	.0000

* Marks the 1 canonical discriminant functions remaining in the analysis.

Standardized canonical discriminant function coefficients

	Function 1
FAC1_1	-.02230
FAC2_1	.80316
FAC3_1	-.05137
FAC4_1	.61128

Structure matrix:

Pooled within-groups correlations between discriminating variables
and canonical discriminant functions
(Variables ordered by size of correlation within function)

	Function 1
FAC2_1	.79095
FAC4_1	.59308
FAC3_1	-.04523
FAC1_1	.00527

Unstandardized canonical discriminant function coefficients

	Function 1
FAC1_1	-.0222721
FAC2_1	.8522036
FAC3_1	-.0526840
FAC4_1	.5702877
(Constant)	-.5631399

Canonical discriminant functions evaluated at group means (group centroids)

Group	Function 1
1	-.52082
2	.99824

Test of Equality of Group Covariance Matrices Using Box's M

The ranks and natural logarithms of determinants printed are those
of the group covariance matrices.

Group Label		Rank	Log Determinant	
1	no	4	-.117431	
2	yes	4	-.016523	
Pooled within-groups covariance matrix		4	-.031770	
Box's M	Approximate F	Degrees of freedom	Significance	
19.58898	1.93360	10,	337724.5	.0362

Classification results -

Actual Group		No. of Cases	Predicted Group Membership	
			1	2
-----		-----	-----	-----
Group	1	253	228	25
no			90.1%	9.9%
Group	2	132	45	87
yes			34.1%	65.9%

Percent of "grouped" cases correctly classified: 81.82%

Classification processing summary

- 385 (Unweighted) cases were processed.
- 0 cases were excluded for missing or out-of-range group codes.
- 0 cases had at least one missing discriminating variable.
- 385 (Unweighted) cases were used for printed output.

6.4 The Impact of Demographic Factors on GCC Consumers Attitudes Towards Visiting Australian Tourist Resorts

The aim of this section is to find out how the GCC consumers who expressed interest to visit Australia differ in their demographic profile from those who are not interested.

Data were obtained, for each sample, on monthly household income (INCOME), importance of travel (TRAVEL: measured on a five-point scale), importance attached to family vacation (VACATION: measured on a five-point scale), family size (FSIZE), age of the head of the household (AGE), and whether the respondent would be interested in visiting Australia (Visit: Yes or No). The basic characteristics of the samples are outlined in Chapter Four.

A two-group discriminant analysis was conducted on each sample using the above mentioned variables as the predictors. The dependent variable (VISIT) was the answer to the question: Would you be interested in visiting Australia? The statistical results are given in Tables 6-4, 6-5 and 6-6 for the Kuwaiti, Saudi and UAE samples respectively. The following can be concluded from these results:

1. The group means suggest that the two groups, in all three samples, are widely separated in terms of income and attitudes towards travel than other variables. There also appears to be more of a separation on the impact of family size than on age. Differences between the groups are smallest for the consumers' attitudes towards family vacation.
2. The pooled within-groups correlation matrix, which is computed by averaging the separate covariance matrices for all groups, indicates low

correlations between the predictors. Hence, multicollinearity is not a serious problem.

3. The significance of the univariate F ratios indicate that when the predictors are considered individually, all variables significantly differentiate between the two groups.
4. Because there are two groups, only one discriminant function is estimated for each sample. The Wilk's λ associated with the estimated function, in each sample, transforms to a chi-square which is significant beyond the .01 level. We must, therefore, reject the null hypothesis that, in the population, the means of all discriminant functions in all groups are equal.
5. The level of significance of Box's M suggests that we should reject the null hypothesis that, for each sample taken separately, the covariance matrices are equal.
6. The canonical correlation associated with the discriminant function is .7915; .7386; and .7476 for the kuwaiti, Saudi and UAE samples respectively. This coefficient measures the extent of association between the single discriminant function and the set of dummy variables which define the group membership. The square of this coefficient indicates that 62.6%, 54.5% and 55.9% of the variance of the dependent variable, in the Kuwaiti, Saudi and UAE samples respectively, is explained or accounted for by this model. This is a significant percentage given each sample size ($N = 385$).

7. The absolute magnitude of the standardized discriminant function coefficients, suggest that income and the attitude towards travel are the most important predictors in discriminating between the two groups of consumers (those who expressed interest to visit Australia and those who did not).
8. The structure matrix coefficients, which represent simple correlations between each predictor and the discriminant function or the variance that the predictor shares with the function suggest that for both Kuwaiti and Saudi consumers, income and the attitude towards travel are the most important predictors followed by the family size, vacation and age. The UAE consumers, however, seem to attach greater importance to family vacation than to age and family size. Also, age seems to carry greater weight, for the UAE consumers, than family size.
9. In order to obtain a better picture on the relative importance of various predictors in the three sample countries, the relative discriminating power of each predictor was calculated for each sample as follows:

$$I_j = | k_j (X_{j1} - X_{j2}) |$$

where:

I_j = the relative discriminating power of the jth variable

k_j = unstandardized discriminant coefficient of the jth variable

X_{jk} = mean of the jth variable for the kth group.

The relative importance weight may be interpreted as the portion of the discriminant score separation between the groups that is attributable to the j th variable. Since a relative importance value shows the value of a particular variable to the sum of the importance values of all variables. The relative importance of a variable (R_j) is given by:

$$R_j = I_j / \sum_{j=1}^n I_j$$

The relative discriminating power of the five variables are given below, for each sample country.

Predictors	Kuwait	Saudi Arabia	UAE
Income	50.6%	69.5%	43.6%
Travel	38.4	18.5	35.3
Vacation	3.0	4.8	13.1
Age	1.2	1.4	5.2
Family Size	6.8	5.8	2.8
	100.0	100.0	100.0

10.The group centroids, suggest that group 2 (those who are interested in visiting Australia) has a positive value while group 1 (those not interested in visiting Australian resources) has a negative value in all three samples. Since the sign associated with the income and attitudes towards travel variables is positive in both the standardized and non-standardized

discriminant functions, for all samples, this suggests that the level of income of the GCC consumers and their attitude towards travel are decisive factors in determining the size of potential tourists to Australia.

11. The Classification matrix, based on sample analysis gives a hit ratio of 93.77%, 94.29% and 88.57% for the Kuwaiti, Saudi and UAE samples respectively. We also calculated for each sample the Press's Q statistic. The calculations give a Q statistic equals 295.0; 302.0 and 229.1 for the Kuwaiti, Saudi and UAE samples respectively. The critical value at a significant level of .01 is 6.63. This suggests that the predictions are significantly better than chance.

6.5 CONCLUSIONS

The main conclusions of this chapter may be summarized in the following:

1. Discriminant analysis of factor scores suggests that the "cost factor" and the "image factor" are the most important predictors which discriminate between GCC consumers who expressed interest to visit Australia as a tourist resort and those who did not. The "cost factor" is highly related to such variables as "traveling expenses", "tourist packages", "cost of accommodation" and "cost of living at resort". The "image factor", is related to such variables as "knowledge of places to visit and see", "recommendations of friends and relatives", "prior information about the resort", "communications with nationals", "adventures" and "memories to bring back home".

2. The “cost factor” seems to be relatively more important in discriminating between the two groups of consumers in those GCC countries with relatively lower standard of living (e.g. Saudi Arabia) while the “image factor” plays a stronger role in discriminating between the two groups in the relatively richer GCC states (e.g. the United Arab Emirates).
3. The above conclusion suggests that the Australian Tourist Bureau and the Australian tourist industry should work out a marketing strategy where price and promotion are given the leading role in order to attract more tourists from the GCC. Tourist packages, travel excursions, the offering of variety of accommodation to suit various budgets may be some possible measures. Extensive international advertising about Australian tourist resorts is needed in various GCC states. The GCC potential tourist needs to know what Australia is able to offer in order to select it as a tourist destination. Australian unique features, tourist attractions and adventures should be communicated to the GCC consumer.
4. Discriminant analysis shows that it is possible to separate the two groups of GCC consumers (those interested to visit Australia as a tourist resort and those who are not) on the basis of some demographic variables, attitude towards travel and importance of family vacation.
5. Income and attitude towards travel seem to be the most important variables that discriminate between the two groups of consumers.

This may be due to the traveling costs and the distance. Traveling expenses to Australia are much higher than those to other neighboring tourist resorts (e.g .Egypt, Turkey, Europe) and the distance only appeals to those who love traveling. Family size and age seem to play a negative role in selecting Australia as a tourist resort.

Table 6-4
Discriminant Analysis of Demographic Variables
(Kuwaiti Respondents)

On groups defined by VISIT: would you be interested in visiting Australia ?

385 (Unweighted) cases were processed.
0 of these were excluded from the analysis.
385 (Unweighted) cases will be used in the analysis.

Number of cases by group

Number of cases			
VISIT	Unweighted	Weighted	Label
1	289	289.0	no
2	96	96.0	yes
Total	385	385.0	

Group means

VISIT	INCOME	TRAVEL	VACATION	AGE
1	3385.25952	3.08997	3.91696	44.72664
2	5083.43750	4.48958	4.27083	40.66667
Total	3808.70130	3.43896	4.00519	43.71429

VISIT	FSIZE
1	5.50173
2	3.00000
Total	4.87792

Group standard deviations

VISIT	INCOME	TRAVEL	VACATION	AGE
1	613.86697	.74457	.93913	11.08794
2	1098.00281	.54280	.74663	8.24451
Total	1059.27790	.92536	.90713	10.58849

VISIT	FSIZE
1	2.36603
2	1.46539
Total	2.42988

Pooled within-groups correlation matrix

	INCOME	TRAVEL	VACATION	AGE	FSIZE
INCOME	1.00000				
TRAVEL	.10578	1.00000			
VACATION	-.12723	-.03987	1.00000		
AGE	-.06512	-.12816	.12556	1.00000	
FSIZE	-.14805	-.13711	-.11914	-.00417	1.00000

Wilks' Lambda (U-statistic) and univariate F-ratio
with 1 and 383 degrees of freedom

Variable	Wilks' Lambda	F	Significance
-----	-----	-----	-----
INCOME	.51769	356.8209	.0000
TRAVEL	.57069	288.1220	.0000
VACATION	.97144	11.2597	.0009
AGE	.97241	10.8669	.0011
FSIZE	.80108	95.1070	.0000

Direct method: all variables passing the tolerance test are entered.
Minimum tolerance level:..... .00100

Canonical Discriminant Functions

Maximum number of functions..... 1
Minimum cumulative percent of variance... 100.00
Maximum significance of Wilks' Lambda.... 1.0000

Prior probabilities

Group	Prior	Label
1	.75065	no
2	.24935	yes
Total	1.00000	

Classification function coefficients
(Fisher's linear discriminant functions)

VISIT =	1 no	2 yes
INCOME	.0072729	.0099494
TRAVEL	7.5484828	10.0088125
VACATION	5.8837526	6.6387837
AGE	.4471448	.4355058
FSIZE	2.1673184	1.9238140
(Constant)	1.7441789	-75.0627337

Canonical Discriminant Functions

Pct of Cum Canonical After Wilks'									
Fcn	Eigenvalue	Variance	Pct	Corr	Fcn	Lambda	Chi-square	df	Sig
					:	0.373568	374.661	5	.0000
1*	1.6769	100.00	100.00	.7915	:				

* Marks the 1 canonical discriminant functions remaining in the analysis.

Standardized canonical discriminant function coefficients

Function 1	
INCOME	.68421
TRAVEL	.57686
VACATION	.22642
AGE	-.04076
FSIZE	-.17762

Structure matrix:

Pooled within-groups correlations between discriminating variables
and canonical discriminant functions
(Variables ordered by size of correlation within function)

Function 1	
INCOME	.74537
TRAVEL	.66979
FSIZE	-.38482
VACATION	.13241
AGE	-.13008

Unstandardized canonical discriminant function coefficients

Function 1	
INCOME	8.96555275E-04
TRAVEL	.8241307
VACATION	.2529109
AGE	-3.89869645E-03
FSIZE	-.0815661
(Constant)	-6.6935206

Canonical discriminant functions evaluated at group means (group centroids)

Group	Func 1
1	-.74440
2	2.24096

Test of Equality of Group Covariance Matrices Using Box's M

The ranks and natural logarithms of determinants printed are those
of the group covariance matrices.

Group Label	Rank	Log Determinant	
1 no	5	18.341994	
2 yes	5	16.703710	
Pooled within-groups covariance matrix	5	18.470673	
Box's M	Approximate F	Degrees of freedom	Significance
204.92095	13.38324	15,	129092.0 .0000

Classification results -

Actual Group		No. of Cases	Predicted Group Membership	
			1	2
-----		-----	-----	-----
Group	1	289	277	12
no			95.8%	4.2%
Group	2	96	12	84
yes			12.5%	87.5%

Percent of "grouped" cases correctly classified: 93.77%

Classification processing summary

- 385 (Unweighted) cases were processed.
- 0 cases were excluded for missing or out-of-range group codes.
- 0 cases had at least one missing discriminating variable.
- 385 (Unweighted) cases were used for printed output.

Table 6-5
Discriminant Analysis of Demographic Variables
(Saudi Respondents)

On groups defined by VISIT: Would you be interested in visiting Australia ?

385 (Unweighted) cases were processed.
0 of these were excluded from the analysis.
385 (Unweighted) cases will be used in the analysis.

Number of cases by group

VISIT	Number of cases Unweighted	Weighted Label
1	325	325.0 no
2	60	60.0 yes
Total	385	385.0

Group means

VISIT	INCOME	TRAVEL	VACATION	AGE
1	2247.81538	3.23385	4.08615	42.33538
2	3695.33333	4.55000	3.55000	38.45000
Total	2473.40260	3.43896	4.00260	41.72987

VISIT	FSIZE
1	5.43385
2	3.43333
Total	5.12208

Group standard deviations

VISIT	INCOME	TRAVEL	VACATION	AGE
1	489.11973	.93000	.80044	11.69579
2	843.03822	.50169	.74618	6.78839
Total	766.43663	.99846	.81490	11.15748

VISIT	FSIZE
1	2.32261
2	1.82605
Total	2.36470

Pooled within-groups correlation matrix

	INCOME	TRAVEL	VACATION	AGE	FSIZE	
INCOME	1.00000					
TRAVEL		.10616	1.00000			
VACATION		.02487	-.09272	1.00000		
AGE		.00306	-.08115	-.10355	1.00000	
FSIZE		-.09756	-.05185	.04468	-.06336	1.00000

Wilks' Lambda (U-statistic) and univariate F-ratio
with 1 and 383 degrees of freedom

Variable	Wilks' Lambda	F	Significance
INCOME	.52952	340.2920	.0000
TRAVEL	.77081	113.8806	.0000
VACATION	.94290	23.1926	.0000
AGE	.98401	6.2256	.0130
FSIZE	.90560	39.9240	.0000

Minimum tolerance level..... .00100

Canonical Discriminant Functions

Maximum number of functions.....	1
Minimum cumulative percent of variance...	100.00
Maximum significance of Wilks' Lambda....	1.0000

Prior probabilities

Group	Prior	Label
1	.84416	no
2	.15584	yes
Total	1.00000	

Classification function coefficients
(Fisher's linear discriminant functions)

VISIT =	1 no	2 yes
INCOME	.0066176	.0109743
TRAVEL	5.0078320	6.2847264
VACATION	7.3840076	6.5693408
AGE	.4479880	.4145006
FSIZE	1.3549974	1.0944750
(Constant)	-43.9547014	-57.9416262

Canonical Discriminant Functions

Pct of Cum Canonical After Wilks'									
Fcn	Eigenvalue	Variance	Pct	Corr	Fcn	Lambda	Chi-square	df	Sig
					:	0.454524	300.026	5	.0000
1*	1.2001	100.00	100.00	.7386	:				

* Marks the 1 canonical discriminant functions remaining in the analysis.

Standardized canonical discriminant function coefficients

Function 1	
INCOME	.80763
TRAVEL	.37205
VACATION	-.21427
AGE	-.12319
FSIZE	-.19487

Structure matrix:

Pooled within-groups correlations between discriminating variables
and canonical discriminant functions
(Variables ordered by size of correlation within function)

Function 1	
INCOME	.86043
TRAVEL	.49775
FSIZE	-.29472
VACATION	-.22463
AGE	-.11638

Unstandardized canonical discriminant function coefficients

Function 1	
INCOME	1.44619766E-03
TRAVEL	.4238701
VACATION	-.2704318
AGE	-.0111163
FSIZE	-.0864814
(Constant)	-3.0454265

Canonical discriminant functions evaluated at group means (group centroids)

Group	Function 1
1	-.46948
2	2.54299

Test of Equality of Group Covariance Matrices Using Box's M

The ranks and natural logarithms of determinants printed are those
of the group covariance matrices.

Group Label	Rank	Log Determinant
1 no	5	18.292427
2 yes	5	16.265270
Pooled within-groups covariance matrix	5	18.301606

Box's M	Approximate F	Degrees of freedom	Significance
123.11767	7.95074	15, 43183.1	.0000

Classification results -

Actual Group			Predicted Group Membership	
No. of Cases			1	2
Group 1	325		314	11
no			96.6%	3.4%
Group 2	60		11	49
yes			18.3%	81.7%

Percent of "grouped" cases correctly classified: 94.29%

Classification processing summary

- 385 (Unweighted) cases were processed.
- 0 cases were excluded for missing or out-of-range group codes.
- 0 cases had at least one missing discriminating variable.
- 385 (Unweighted) cases were used for printed output.

Table 6-6
Discriminant Analysis of Demographic Variables
(UAE Respondents)

On groups defined by VISIT: would you be interested in visiting Australia ?
 385 (Unweighted) cases were processed.
 0 of these were excluded from the analysis.
 385 (Unweighted) cases will be used in the analysis.

Number of cases by group

VISIT	Number of cases		Label
	Unweighted	Weighted	
1	253	253.0	no
2	132	132.0	yes
Total	385	385.0	

Group means

VISIT	INCOME	TRAVEL	VACATION	AGE
1	4439.39130	3.02767	3.09091	44.22925
2	7069.62879	4.21212	3.86364	39.80303
Total	5341.18701	3.43377	3.35584	42.71169

VISIT	FSIZE
1	4.42292
2	3.54545
Total	4.12208

Group standard deviations

VISIT	INCOME	TRAVEL	VACATION	AGE
1	1374.72829	1.03281	1.13198	10.24670
2	1428.30589	. 97315	1.25870	7.72963
Total	1870.54806	1.15758	1.23137	9.68044

VISIT	FSIZE
1	2.19645
2	1.86721
Total	2.12822

Pooled within-groups correlation matrix

	INCOME	TRAVEL	VACATION	AGE	FSIZE
INCOME	1.00000				
TRAVEL	.03776	1.00000			
VACATION	-.05371	-.00179	1.00000		
AGE	-.08750	.09752	.02607	1.00000	
FSIZE	-.00850	-.05087	-.09015	.07602	1.00000

Wilks' Lambda (U-statistic) and univariate F-ratio
with 1 and 383 degrees of freedom

Variable	Wilks' Lambda	F	Significance
-----	-----	-----	-----
INCOME	.55336	309.1315	.0000
TRAVEL	.76350	118.6377	.0000
VACATION	.91104	37.3970	.0000
AGE	.95277	18.9840	.0000
FSIZE	.96160	15.2946	.0001

Minimum tolerance level..... .00100

Canonical Discriminant Functions

Maximum number of functions..... 1
Minimum cumulative percent of variance... 100.00
Maximum significance of Wilks' Lambda.... 1.0000

Prior probabilities

Group	Prior	Label
1	.65714	no
2	.34286	yes
Total	1.00000	

Classification function coefficients
(Fisher's linear discriminant functions)

VISIT =	1 no	2 yes
INCOME	.0026268	.0039522
TRAVEL	2.4967962	3.6116858
VACATION	2.4709918	3.1051770
AGE	.4762036	.4321319
FSIZE	1.0508492	.9322726
(Constant)	-26.7040656	-38.8985390

Canonical Discriminant Functions

	Pct of	Cum	Canonical		After Wilks'				
Fcn	Eigenvalue	Variance	Pct	Corr	Fcn	Lambda	Chi-square	df	Sig
					:	0 .441042	311.483	5	.0000
1*	1.2674	100.00	100.00	.7476	:				

* Marks the 1 canonical discriminant functions remaining in the analysis.

Standardized canonical discriminant function coefficients

Function 1

INCOME	.78065
TRAVEL	.47734
VACATION	.31551
AGE	-.17627
FSIZE	-.10475

Structure matrix:

Pooled within-groups correlations between discriminating variables
and canonical discriminant functions
(Variables ordered by size of correlation within function)

Function 1

INCOME	.79804
TRAVEL	.49438
VACATION	.27757
AGE	-.19776
FSIZE	-.17751

Unstandardized canonical discriminant function coefficients

Function 1	
INCOME	2.62040292517E-04
TRAVEL	.4713028
VACATION	.2680922
AGE	-.0186306
FSIZE	-.0501265
(Constant)	-4.5082749

Canonical discriminant functions evaluated at group means (group centroids)

Group	Function 1
1	-.81105
2	1.55450

Test of Equality of Group Covariance Matrices Using Box's M

The ranks and natural logarithms of determinants printed are those of the group covariance matrices.

Group Label	Rank	Log Determinant
1 no	5	20.808594
2 yes	5	19.576366
Pooled within-groups covariance matrix	5	20.757743

Box's M	Approximate F	Degrees of freedom	Significance
141.94606	9.31133	15, 292467.7	.0000

Classification results -

Actual Group		No. of Cases	Predicted Group Membership	
			1	2
-----		-----	-----	-----
Group no	1	253	228 90.1%	25 9.9%
Group yes	2	132	19 14.4%	113 85.6%

Percent of "grouped" cases correctly classified: 88.57%

Classification processing summary

- 385 (Unweighted) cases were processed.
- 0 cases were excluded for missing or out-of-range group codes.
- 0 cases had at least one missing discriminating variable.
- 385 (Unweighted) cases were used for printed output.

CHAPTER SEVEN

CLUSTERING OF TOURIST RESORTS VISITED BY GCC CONSUMERS

ABSTRACT

The GCC citizens have a wide range of choices when it comes to selecting a tourist resort. This chapter uses cluster analysis to identify resorts with similar attributes. By examining their characteristics, it may be possible to target future-marketing strategies more efficiently. Multiple discriminant analysis was used to describe the nature of the differences between clusters and to test these differences for significance.

The results of the surveys conducted by the Researcher in the three Gulf States were used to identify homogeneous tourist resorts visited by the Gulf Consumers. Six variables were applied to 13 resorts, each of them was visited by at least 4 percent of the GCC tourists in 1998. The icicle figure, the agglomeration schedule and the dendrogram suggest that tourist resorts visited by Gulf consumers can be clustered into four groups. The first group includes resorts in Morocco, Tunisia, and South East Asia. The second group comprises Egypt, Lebanon and Turkey. Included in the third group are Spain, UK, France and other European resorts. Finally, Group four included tourist resorts in USA, Australia and South America.

Multiple discriminant analysis suggests that GCC tourists selected Egypt, Lebanon and Turkey because travelling and living expenses are relatively cheaper for these resorts. Those GCC consumers who select Morocco, Tunisia or South East Asia believe that these resorts offer better entertainment than other resorts. GCC consumers who visit European resorts (England, France, Spain and others) find more comfort in spending their vacations in these resorts than in other places. Finally, multiple discriminant analysis suggests that GCC tourists who visit the USA, Australia or South America do so because of the attractions and adventures.

CLUSTERING OF TOURIST RESORTS VISITED BY GCC CONSUMERS

7.1 Introduction:

The GCC tourists spend their vacations in a variety of resorts all over the world. Some travel to neighboring Arab countries, while others elect to spend their vacation in Europe; South East Asia; America or Australia. Although a large number of Gulf residents own property in neighboring Arab countries, Europe and the USA, most of Gulf tourists can be labeled “floating customers”. However, the degree of “attachment” to a particular tourist resort is not static. There seems to be a high correlation between the type of resort visited and the local economic conditions, which are very sensitive to the fluctuations in oil revenue. Our survey results suggest that GCC consumers changed visited resorts during the boom years (1974-1982) than during other periods.

The aim of this chapter is to cluster tourist resorts visited by the GCC consumers on basis of a number of attributes; describe the nature of the differences between clusters and test these differences for significance. The Chapter is divided into four sections. Section one identifies the major tourist resort visited by the GCC consumers in 1998. Section two outlines briefly the technique of cluster analysis. The clustering of the tourist resorts is done in section three. Multiple discriminant analysis is used in section four to describe the nature of the differences between clusters and to test these differences for significance. Finally, Section five summarizes the main conclusions of the chapter.

**7.2 Identification of Most Important Tourist Resorts Visited by
GCC Tourists in 1998**

Table 7.1 identifies the most important resorts visited by Gulf tourists in 1998. The data in this table are extracted from the survey results conducted by the Researcher in the three GCC countries. Only those resorts visited by at least four percent of total Gulf tourists in that year are included. It was possible to identify 13 resorts. The data in this table suggest that:

1. Over 35 percent of Gulf tourists elected to spend their vacation in neighboring Arab countries (Egypt, Lebanon, Morocco and Tunisia). A large percentage of GCC tourists (17.8 %) chose Egypt as their most preferred resort. Lebanon was the second most preferred neighboring resort. The ranking of Lebanon has changed significantly following the Civil War in that country.
2. Though not an Arab country, Turkey has grown to be a popular tourist resort for the Gulf consumers. Its closeness and similar culture gained her a special position amongst tourist resorts.
3. Approximately 30 percent of the GCC tourists spent their 1998 vacation in Europe. England seems to be the most popular European tourist resort, followed by Spain.
4. South East Asia (Indonesia, The Philippines, Singapore and Thailand) are popular places, but not as popular as neighboring Arab countries.

5. The USA seems to be a much more attractive tourist resorts than Australia, though the both resorts are of similar distance to most GCC countries.
6. A few GCC tourist (4.3%) elected to spend their vacation in South American resorts (Argentina, the Bahamas Brazil and , Mexico).

Table 7-1
Percentage Distribution of GCC Tourists
Over Various Tourist Resorts in 1998

Tourist Resort	Percentage of GCC Consumers Who Visited the Resort in 1998
1 Morocco	4.1
2 Tunisia	4.6
3 Egypt	17.8
4 Lebanon	9.2
5 Turkey	4.0
6 Spain	5.6
7 UK	13.7
8 France	4.1
9 Other.Europe	6.2
10 USA	8.9
11.SE Asia	8.1
12. Australia	4.1
13.South America	4.3

7.3 Methodology

Cluster analysis is concerned with classification and its techniques are part of the field of numerical taxonomy. The usual objective of cluster analysis is to separate objects into groups such that each object is more like other objects in its group than like objects outside the group (Everitt, 1980). Thus cluster analysis can be used to identify homogeneous groups of markets, determine competitive sets within the market and select comparable areas to test various marketing strategies. (Alyman, et al, 1981) Also, cluster analysis can be used as a general data reduction tool to develop groups of data which are more manageable than individual observations.

The aim of cluster analysis is to group together variables that are "similar" in terms of their values on the variables. Similarity may be defined as a construct where a big number indicates that two objects are close together and a small number that two objects are far apart. Thus, similarity is the logical inverse of the concept of distances where a large number indicates that objects are far apart and a small number that objects are close together. For the purpose of clustering, either similarity or distance measures can serve as the basis (Manly, 1994). Distance measures, which explicitly incorporate closeness, are preferred. Some of the most popular include the following (Hartigan, 1975):

(i) Sum of Absolute Differences

This is given by the formula:
$$D_{ij} = \sum_{c=1}^p |X_{ic} - X_{jc}|$$

where D_{ij} = Distance between objects i and j

X_{ic} = value given to object i for the characteristic

X_{jc} = value given to object j for the characteristic

(ii) Sum of Squared Differences (Squared Euclidean Distances)

$$D_{ij} = \sum_{c=1}^p (X_{ic} - X_{jc})^2$$

(iii) Euclidean Distance

$$D_{ij} = \sqrt{\sum_{c=1}^p (X_{ic} - X_{jc})^2}$$

(iv) Minowski Metric

This is the most general form of distance and is given by:

$$D_{ij} = \left[\sum_{c=1}^p w_c (X_{ic} - X_{jc})^k \right]^{\frac{1}{k}}$$

This reduces to Euclidean distance if $k=2$ and $w=1$.

It should be noted that the scale of the variables used affects measures (Funkhouser, 1983).. To reduce this effect, the variables can be standardized before being input to the clustering. Standardization is usually done by re-scaling each variable to have a mean of zero and a standard deviation of unity. The following formula is used for standardization

$$\bar{X}_{ij} = \frac{X_{ij} - \bar{X}_j}{\sigma_j}$$

where: \bar{X}_{ij} = standardized value

X_{ij} = original value

\bar{X}_j = mean value of variable j

σ_j = standard deviation of variable j

$$= \sqrt{(X_{ij} - \bar{X}_j)^2 / (n-1)}$$

Clustering procedures are of two kinds:

1 Hierarchical Clustering. This kind of clustering is characterised by the development of a hierarchy or tree-like structure. These procedures can be *agglomerative* or *divisive*:

i. *Agglomerative Clustering* is commonly used in marketing research. The procedure starts with grouping each object in a separate cluster. Clusters are formed by grouping objects into bigger and bigger clusters. This process is continued until all objects are members of a single cluster (Ryzin, 1977). Agglomerative methods consist of linkage methods, error sums of squares or variance methods and centroid methods. Linkage methods are of three kinds: single linkage, complete linkage and average linkage.

The Single linkage method is based on a minimum distance or nearest neighbour rule. The first two objects clustered are those which have the smallest distance between them. The next shortest distance is identified and either the third object is clustered with the first two, or a new two-object cluster is formed. At every stage, the distance between two clusters is the distance between their two closest points. Two clusters are merged at any stage by the single shortest link between them. The process is continued until all objects are in one cluster.

The complete linkage method is similar to single linkage, except that it is based on the maximum distance or the furthest neighbour approach. In complete linkage, the distance between two clusters is calculated as the distance between their two furthest points.

According to the average linkage method the distance between two clusters is defined as the average of the distances between all pairs of objects, where one member of the pair is from each of the clusters. This

method uses information on all pairs of distances not merely the minimum or maximum distances. For this reason, it is usually preferred to the single and complete linkage methods.

The variance method attempts to generate clusters to minimize the within-cluster variance. A commonly used variance method is the *Ward's Procedure*. For each cluster, the means for all variables are computed. Then, for each object, the squared Euclidean distance to the cluster means is calculated. These distances are summed for all the objects. At each stage, the two clusters with the smallest increase in the overall sum of squares within-cluster distances are combined. In the centroid methods the distance between two clusters is the distance between their centroids (means for all the variables). Every time objects are grouped, a new centroid is computed. Average linkage and Ward's method have been shown to perform better than other procedures (Malhotra, et al, 1996).

The clustering process can be exhibited using a type of figure called a *vertical icicle plot*, because it resembles a row of icicles hanging from eaves. The columns in this figure correspond to the objects being clustered. They are identified by a sequential number corresponding to their order or location in the file and by their labels (if labels are defined). The rows in the figure represent steps in cluster analysis; the figure is read from bottom to top. The last row represents step 1 in the analysis and row 1 represents the last step (in step 0 of the cluster analysis, each case is a separate cluster).

Another way of visually representing the steps in a hierarchical clustering solution is with a display called a *dendrogram*. The dendrogram identifies the cluster being combined and the values of the coefficients at each step.

The dendrogram produced by the SPSS program does not plot actual distances but re-scale them to numbers between 0 and 25. Thus the ratio of the distances between steps is preserved, but the scale displayed at the top of the figure does correspond to actual distance values. The dendrogram is read from left to right. Vertical lines denote joint clusters. The position of the line on the scale indicates the distances at which clusters were joined.

ii. *Divisive Clustering*

Divisive clustering starts with all objects grouped in a single cluster. Clusters are divided or split until each object is in a separate cluster. This method of clustering is *not* as commonly used as agglomerative clustering.

Usually, the hierarchical procedure using the complete linkage, Ward's method or the centroid methods are appropriate for most problems.(Romsburg, 1984). The Researcher must then exercise its judgment to decide on the number of clusters. A number of methods is available to the researcher to decide on the number of clusters (Arnold, 1979, and Klasturin, 1983)

- a) The researcher may consider theoretical, conceptual or practical considerations.
- b) The distances in the agglomerative schedule and the dendrogram can be used as criteria in determining the number of clusters.
- c) The relative size of the clusters, indicated by a simple frequency count of cluster membership, may suggest the appropriate number of clusters.

The derived clusters should be interpreted in terms of the variables used to cluster them and profiled in terms of additional salient variables. Finally, the researcher must assess the validity of the clustering process (Punj and Stewart, 1983). Examination of the dendrogram can help determine the number of clusters

2. Non-Hierarchical Clustering

These methods are often referred to as k-means clustering. They include sequential threshold, parallel threshold and optimizing partitioning. These methods are not commonly used because they need a pre-specification of the number of clusters. Also, the selection of the cluster centers is arbitrary.(Aldenderfer and Blashfield, 1984) Yet, non-hierarchical clustering is faster than hierarchical methods and is suitable for large samples.(Metwally, 1999).

7.4 Data and Analysis

The GCC tourists were asked to rate the tourist resorts they visited in 1998 over five attributes on a 7-point scale. The attributes are:

- Travelling costs (1= extremely low, ,7=extremely high)
- Living expenses (1= extremely low, ,7=extremely high)
- Degree of comfort (1=extremely uncomfortable, ,7=extremely comfortable)
- Endowment with attractions and adventures (1= extremely poor,.....,7= extremely rich)
- Entertainment (1=extremely dull,....., 7=extremely entertaining)

Table 7-2 gives the mean ratings for each of the major resorts visited by the GCC tourists in 1998. The data in this table suggest that:

1. The GCC tourists regard Egypt, as the cheapest tourist resort, followed by Lebanon and Turkey, in terms of travelling and living expenses.

2. GCC tourists rank Egypt most favourably, followed by Turkey and Lebanon in terms of living expenses. GCC consumers, on other hand rank France least favourably in terms of living expenses
3. The mean rating given to the variable “comfort” is relatively high for England, France, Spain and other European resorts.
4. GCC give higher ratings to “Attractions and Adventures” for resorts in the USA, Australia and South America.
5. Tunisia, Morocco and South East Asian resorts are ranked most favourably by GCC in providing suitable types of entertainment.

Table 7.2
Ratings of Major Tourist Resorts
Visited by GCC Tourists in 1998

Tourist Resort	Ratings on				
	Travel costs	living expenses	Comfort	Attractions & Adventures	Entertainment
1 Morocco	5.96	4.94	5.01	4.56	6.28
2 Tunisia	5.38	4.85	5.21	4.34	6.43
3 Egypt	4.02	3.67	5.11	4.82	5.39
4 Lebanon	4.35	4.14	5.02	4.17	5.44
5 Turkey	4.65	4.34	5.12	4.43	5.21
6 Spain	5.67	4.92	6.23	4.88	4.65
7 UK	5.85	5.23	6.66	5.01	4.77
8 France	5.93	5.69	6.21	5.19	4.71
9 Other.Europe	5.88	5.43	6.14	4.89	4.35
10 USA	6.34	5.23	5.67	6.45	4.51
11.SE Asia	5.92	4.45	4.61	4.87	6.11
12.Australia	6.35	5.67	4.78	6.27	4.44
13.South America	6.44	5.12	4.48	6.12	4.35

Agglomerative hierarchical cluster analysis, using Ward's method and the squared Euclidean distances was applied to the 13 resorts and the five variables exhibited in Table 7-2. The SPSS Software was used to estimate the coefficients (Cokes and Steed, 1999). The results are in Table 7-3.

The Dissimilarity Coefficient Matrix shows that the smallest squared Euclidean distance (.2605) is between case 4 (Lebanon) and case 5 (Turkey). The second smallest squared Euclidean distance (.2946) is between case 8 (France) and case 9 (Other Europe).

The cluster analysis is summarized in the agglomeration schedule, which identifies the resorts or clusters being combined at each stage. The first stage in the schedule represents stage 1, the 12-cluster solution. At this stage, resorts 4 and 5 are combined, as indicated in the Cluster 1 and Cluster 2 columns under the heading: Cluster Combined. The column labeled 'Coefficient' refers to the distance at which the objects are combined. The column labeled *Stage Cluster 1st Appears* indicates at which stage a multicase cluster is first formed. The entry of 3, under Cluster 1 in stage 6 indicates that resort 6 was first grouped at stage 3, while the entry of 2 under Cluster 2 in stage 6 indicates that resort 8 was first grouped at stage 2. 'Next Stage', indicates the stage at which another resort is combined with this one. The number in the first line of the last column, 8, suggests that at stage 8, resort 4 is combined with resorts 3 and 5 to form a single cluster. Similarly, at stage 6 resort 8 is combined with resorts 6 and 9 to form a single cluster. The values in the 'Coefficient column' of the agglomeration schedule can be used as criteria in deciding the number of clusters. We notice that the value in the column increased steadily from stage 1 to stage 9 the

suddenly, more than doubles between stages 9 and 10 , almost doubles between stages 10 and 11 and more than doubles between stages 11 and 12.. Hence , according to the information given in the agglomeration schedule *a four-cluster* solution may be appropriate

Another part of the output is contained in the icicle plot. The columns correspond to the 13 resorts being clustered. The rows represent steps in the cluster analysis. The figure is read from bottom to top. Row 12 represents step 1 in the analysis and row 1 represents the last step, where all cases form a single cluster. (In step 0 of the cluster analysis, not pictured in the figure, each case is a separate cluster.) At the first step of the analysis (row 12 in the figure), the two closest resorts are combined into a single cluster, resulting in 12 cases. (The step number corresponds to the number of clusters in the solution). A solid dark bar represents each case and cases are separated by a blank space. The two resorts that have been merged into a single cluster, 5 and 4, do not have a space separating them and are represented by consecutive solid bars. Row 11 corresponds to the solution at the next step, when 11 clusters are present. At this step resort 9 and 9 are merged into a single cluster. At each subsequent step, an additional cluster is formed either by joining a case to an existing multicase cluster, by joining two separate cases into a single cluster, or by joining two multicase clusters. For example, row 4 corresponds to a solution that has 4 clusters: (cases 13, 12 and 10), (cases 9, 8, 7 and 6); (cases 5, 4 and 3) and (cases 11, 2 and 1)

The Dendogram shows that many of the distances at the beginning stages are similar in magnitude. It is not, therefore so easy to tell the sequence in which

some of the early clusters are formed. However, at the last two stages, the distances at which clusters are being combined are fairly large. It appears that the four-cluster solution may be appropriate, since it is easily interpretable and occurs before the distances at which clusters are combined become too large.

Thus according to the results of the agglomeration schedule, the information in the icicle figure and the dendrogram, the tourist resorts visited by GCC residents can be grouped into four clusters: The Cluster membership table suggests the following grouping:

Cluster 1: Cases 1, 2 and 11, i.e.. Morocco, Tunisia and South East Asia

Cluster 2: Cases 3,4 and 5, i.e. Egypt, Lebanon and Turkey

Cluster 3: Cases 6, 7,8 and 9, i.e. Spain, UK, France and other Europe

Cluster 4: Cases 10, 12 and 13 i.e. USA, Australia and South America

Table 7-3
Results of Cluster Analysis

***** P R O X I M I T I E S *****

Data Information

13 unweighted cases accepted.
0 cases rejected because of missing value.

Squared Euclidean measure used.

Squared Euclidean Dissimilarity Coefficient Matrix

	Case 1	Case 2	Case 3	Case 4	Case 5
Case 2	.4554				
Case 3	6.2462	4.5640			
Case 4	4.0899	2.6101	.7629		
Case 5	3.2500	2.2976	1.0304	.2605	
Case 6	4.3322	4.5894	6.0906	4.9431	3.1250
Case 7	5.3013	5.6723	8.6055	7.2822	5.1337
Case 8	4.8652	5.6890	9.5378	7.8883	5.4766
Case 9	5.3572	6.0802	8.7046	6.9659	4.6926
Case 10	7.3691	9.4161	11.5609	11.6340	8.5211
Case 11	.5267	1.1949	4.9893	3.6680	2.8887
Case 12	7.0476	9.4832	12.5428	11.8085	8.7530
Case 13	6.7022	9.2242	11.1274	10.6107	7.8178
	Case 6	Case 7	Case 8	Case 9	Case 10
Case 7	.3447				
Case 8	.7606	.4565			
Case 9	.4024	.5021	.2946		
Case 10	3.3431	3.3614	2.2989	2.9317	
Case 11	5.0395	6.6310	6.1601	6.4009	6.9648
Case 12	5.1036	5.6745	3.4610	4.0406	1.0231
Case 13	5.3230	6.5211	4.5724	4.6782	1.5727
	Case 11	Case 12			
Case 12	6.4511				
Case 13	5.3963	.4312			

Agglomeration Schedule using Ward Method

Stage	Clusters Cluster 1	Combined Cluster 2	Coefficient	Stage Cluster Cluster 1	1st Appears Cluster 2	Next Stage
1	4	5	.130250	0	0	8
2	8	9	.277550	0	0	6
3	6	7	.449900	0	0	6
4	12	13	.665500	0	0	9
5	1	2	.893200	0	0	7
6	6	8	1.263775	3	2	11
7	1	11	1.761742	5	0	10
8	3	4	2.316092	0	1	10
9	10	12	3.109492	0	4	11
10	1	3	8.171659	7	8	12
11	6	10	14.629205	6	9	12
12	1	6	30.994385	10	11	0

7.5 Discriminant Analysis of Tourist Clusters

Multiple discriminant analysis (MDA) is used in this section to describe the nature of the differences between clusters and to test these differences for significance. The grouping variable for this analysis is the cluster membership variable created in the previous Section. Although the cell size in each group is small, MDA is relatively robust to this problem. Also, because the results are used only to guide the interpretation of clusters, it is considered appropriate to proceed analysis.

Table 7.4 presents the results of estimating four-group discriminant analysis for the four-cluster solution . The following comments can be made:

1. An examination of group means indicates that cost of travelling appears to separate the groups more widely than any other variable. There is also some important separation on other variables
2. The significance attached to the univariate F ratios indicates that when the predictors are considered individually, all predictors, are highly significant in discriminating between the four clusters.
3. Since we have four clusters and five predictors, we end with three discriminant functions. For each function, the eigenvalue is the ratio of between-groups to within-groups sums of squares. The eigenvalue for function 1 is 75.9453. For the other two functions, the eigenvalues are 21.8407 and 7.5958 respectively. Hence, all three functions are significant.
4. The canonical correlation for function 1 is 0.9935; while for functions 2 and 3, the correlations are 0.9779 and 0.9400 respectively. Hence, the proportion of total variability explained by differences between

groups is 98.73% for function 1 and 95.6% and 88.4% for function 2 and 3 respectively.

5. The first function has the largest between-groups variability (as is usually the case). This function accounts for 72.07% of the variability. Function 2 accounts for 20.73% of the variability while function 3 accounts for the remaining 7.21% of the between-groups variability.
6. The Wilks' lambda associated with function 1 is .000066. This transforms to a chi-square value of 72.172, which is statistically significant at .0003 level. The Wilks' lambda of function 2 after function 1 has been removed is 0.005093. The significance level associated with the second function is also .0000, indicating that it does contribute significantly to group differences. The Wilks' lambda of function 3 after function 2 has been removed is 0.116336. The significance level associated with the third function is also .0011, indicating that it does contribute significantly to group differences.
7. The standardized canonical discriminant function coefficients indicate a large coefficient for "entertainment" on function 1, whereas function 2 has relatively larger coefficients for "travelling cost", "attractions" and "living expenses". Function three has a relatively larger coefficient for "Comfort". A similar conclusion is reached by an examination of the structure matrix.
8. The canonical discriminant functions evaluated at group means (group centroid) suggest that group 1, (Morocco, Tunisia and South East Asia) has a large positive value on all three functions. Since the "entertainment" variable has a positive sign on the three functions,

this suggests that GCC tourists who visit these resorts attach great importance to “entertainment”. Group 2 (Egypt, Lebanon and Turkey) on the other hand has a large negative value on functions 2 and 3 and a positive value on function 1. Since both “travelling costs” and “living expenses” attributes have negative signs on function 2 and 3 and a positive value on function 1, this suggests that GCC tourists who visit Group 2 resorts attach more importance to travelling and living expenses. Group 3 (Spain, France, UK and Other Europe) has negative values on functions 1 and 2 and a positive value on function 3. Since the “comfort variable” has a negative value on functions 1 and 2 and a positive value on function 3, GCC visitors who visit these resorts do so for comfortability. Group 4 (USA, Australia and South America) has a positive value on function 2, negative values on functions 1 and 3. Since “attraction and adventures” carries a positive sign in function 2 and a negative sign on functions 1 and 3, this suggests that GCC who visit these resorts do so for attractions and adventures.

- 9 . An examination of the classification results table indicates that 100% (13 resorts) were correctly classified

Table 7-4
Discriminant Analysis of Resort Clusters

On groups defined by CLU4_1 Ward Method

13 (Unweighted) cases were processed.
0 of these were excluded from the analysis.
13 (Unweighted) cases will be used in the analysis.

Number of cases by group

CLU4_1	Number of cases		Label
	Unweighted	Weighted	
1	3	3.0	
2	3	3.0	
3	4	4.0	
4	3	3.0	
Total	13	13.0	

Group means

CLU4_1	TCOST	LCOST	COMFORT	ATTRACRT
1	5.75333	4.74667	4.94333	4.59000
2	4.34000	4.05000	5.08333	4.47333
3	5.83250	5.31750	6.31000	4.99250
4	6.37667	5.34000	4.97667	6.28000
Total	5.59538	4.89846	5.40385	5.07692

CLU4_1	ENTERTA
1	6.27333
2	5.34667
3	4.62000
4	4.43333
Total	5.12615

Group standard deviations

CLU4_1	TCOST	LCOST	COMFORT	ATTRACT
1	.32393	.26083	.30551	.26627
2	.31512	.34395	.05508	.32716
3	.11325	.32510	.23650	.14431
4	.05508	.29103	.61890	.16523
Total	.78059	.60382	.70136	.74430

CLU4_1	ENTERTA
1	.16010
2	.12097
3	.18655
4	.08021
Total	.75036

Wilks' Lambda, Canonical Discriminant Functions, and Univariate F-ratio
with 3 and 9 degrees of freedom

Variable	Wilks' Lambda	F	Significance
TCOST	.06195	45.4224	.0000
LCOST	.19637	12.2775	.0016
COMFORT	.19086	12.7187	.0014
ATTRACT	.07114	39.1693	.0000
ENTERTA	.02928	99.4748	.0000

Analysis number 1

Direct method: all variables passing the tolerance test are entered.

Minimum tolerance level..... .00100

Canonical Discriminant Functions

Maximum number of functions..... 3
Minimum cumulative percent of variance... 100.00
Maximum significance of Wilks' Lambda.... 1.0000

Prior probabilities

Group	Prior	Label
1	.23077	
2	.23077	
3	.30769	
4	.23077	
Total	1.00000	

Canonical Discriminant Functions

Fcn	Eigenvalue	Pct of Variance	Cum Pct	Canonical Corr	After Fcn	Wilks' Lambda	Chi-square	df	Sig
					:	0 .000066	72.172	15	.0000
1*	75.9453	72.07	72.07	.9935	:	1 .005093	39.599	8	.0000
2*	21.8407	20.73	92.79	.9779	:	2 .116336	16.135	3	.0011
3*	7.5958	7.21	100.00	.9400	:				

* Marks the 3 canonical discriminant functions remaining in the analysis.

Standardized canonical discriminant function coefficients

	Func 1	Func 2	Func 3
TCOST	.56322	-.84329	-.66539
LCOST	.38920	-.44832	-.19632
COMFORT	-.70917	-.12175	.83576
ATTRACT	-.18979	.60515	-.68507
ENTERTA	1.33573	.34584	.01066

pooled within-groups correlations between discriminating variables
and canonical discriminant functions
(Variables ordered by size of correlation within function)

	Func 1	Func 2	Func 3
ENTERTA	.64964*	-.19690	.18491
TCOST	-.10250	-.78738*	.32501
ATTRACT	-.22750	.57138*	-.51254
LCOST	-.11977	-.32862*	.29130
COMFORT	-.14129	-.07880	.58370*

* denotes largest absolute correlation between each variable and any discriminant function.

Canonical discriminant functions evaluated at group means (group centroids)

Group	Func 1	Func 2	Func 3
1	12.25003	2.07005	1.01472
2	1.04623	-6.09468	-2.12153
3	-6.23945	-.62305	2.79341
4	-4.97700	4.85535	-2.61773

Classification results -

Actual Group		No. of Cases	Predicted Group Membership			
			1	2	3	4
Group	1	3	3 100.0%	0 .0%	0 .0%	0 .0%
Group	2	3	0 .0%	3 100.0%	0 .0%	0 .0%
Group	3	4	0 .0%	0 .0%	4 100.0%	0 .0%
Group	4	3	0 .0%	0 .0%	0 .0%	3 100.0%

Percent of "grouped" cases correctly classified: 100.00%

Classification processing summary

- 13 (Unweighted) cases were processed.
- 0 cases were excluded for missing or out-of-range group codes.
- 0 cases had at least one missing discriminating variable.
- 13 (Unweighted) cases were used for printed output.

7.6 Conclusions

The Main findings of this chapter may be summarized in the following:

1. According to the results of the cluster analysis revealed in the agglomeration schedule, the icicle figure and the dendogram, the 13 most popular tourist resorts visited by GCC residents can be grouped into four clusters based on five predictors: “Travelling Cost”; “Living Expenses” , “Entertainment”; “Comfort”; “Attractions and adventures”
2. The Cluster membership table suggests the following grouping:
 - Cluster 1: Cases 1, 2 and 11, i.e.. Morocco, Tunisia and South East Asia
 - Cluster 2: Cases 3,4 and 5, i.e. Egypt, Lebanon and Turkey
 - Cluster 3: Cases 6, 7,8 and 9, i.e. Spain, UK, France and other Europe
 - Cluster 4: Cases 10, 12 and 13 i.e. USA, Australia and South America
3. Multiple Discriminant Analysis identified three discriminant functions. The standardized canonical discriminant function coefficients indicate a large coefficient for “entertainment” on function 1, whereas function 2 has relatively larger coefficients for “travelling cost”, “attractions” and “living expenses”. Function three has a relatively larger coefficient for “Comfort”. A similar conclusion is reached by an examination of the structure matrix.
4. The canonical discriminant functions evaluated at group means (group centroid) suggest that GCC Consumers who visit Morocco, Tunisia and South East Asia, attach great importance to “entertainment. The results also suggest that GCC consumers who visit Egypt, Lebanon and Turkey

attach more importance to travelling and living expenses. Multiple Discriminant Analysis also suggests that GCC tourists who elect to visit Group 3 resorts (Spain, France, UK and Other Europe) do so for comfort. Also the results suggest that GCC tourists who visit of Group 4 resorts (USA, Australia and South America) do so for attractions and adventures.

CHAPTER EIGHT

MARKETING STRATEGIES OF AUSTRALIAN TOURIST RESORTS AIMING AT ATTRACTING GCC TOURISTS

ABSTRACT

This chapter uses the statistical results of previous chapters in assisting the Australian tourist industry draw effective marketing strategies to maximize the intake of GCC tourists.

The chapter develops a tourist-marketing plan that can be used by the Australian Federal and State Tourist Bureaus in dealing with GCC potential consumers. The chapter also develops a model of perceived service quality and applies it to Australian hotels accommodating potential GCC tourists.

The Chapter offers some recommendations regarding the marketing-mix of the Australian tourist industry aimed at attracting the maximum number of GCC tourists

MARKETING STRATEGIES OF AUSTRALIAN TOURIST RESORTS AIMING AT ATTRACTING GCC TOURISTS

8.1 Introduction

Tourism is bought and sold both formally and informally by industry, Consumers, and governments. Governments often sell tourism through promotional efforts designed to build demand for travel to a particular country. Industrial groups purchase tourism as a means of bringing personnel together for meetings and conferences. They may also sell tourism for particular areas. And, most importantly, individuals travel both alone and in groups, and spend money on tourist services

Australian National and State Tourist Bureaus should approach the job of attracting GCC tourists from a planning point of view. The directors of these bureaus may begin their task by asking questions along the following lines: Why do the GCC tourists come to Australia? What kind of tour experience are they looking for? Do these tourists differ in their needs for the level and quality of service?

This chapter uses the statistical results of previous chapters in assisting the Australian tourist industry draw effective marketing strategies to maximize the intake of GCC tourists. The chapter is divided into five sections. Section two outlines a tourist-marketing plan that can be used by the Australian Federal and State Tourist Bureaus in dealing with GCC potential consumers. Section three develops a model of perceived service quality and applies it to Australian hotels accommodating potential GCC tourists. Section four examines the marketing-mix

of Australian tourist bureaus directed to GCC consumers. Finally, section four summarizes the main conclusions of the chapter.

8.2 Development of a Tourism Marketing Plan for Australian Tourist Resort Aiming at Attracting GCC Tourists

As is mentioned above, the Australian National and State Tourist Bureaus should approach the job of attracting GCC tourists from a planning point of view.

Tourism is a very competitive service and GCC consumers have a wide range of tourist resorts where they can spend their vacations. Only 4 percent of these tourists chose Australia as their favorable resort in 1998. If the Australian tourist industry is to expand its market share in the GCC countries, it needs to establish a set of marketing goals that explicitly recognizes its current market share, what market share it should aim at achieving and how it proposes to achieve that. Table 8-1 summarizes the key elements in a proposed marketing plan, beginning with an analysis of the current situation and identification of problems and opportunities. A good marketing plan does more than identify goals and strategies that are based upon facts and current assumptions; it also provides a plan of action for accomplishing the mission, using existing and readily available resources.(Langeard et al, 1981).. As shown in Table 8-1, a marketing action plan should specify:

1. A detailed breakdown of required activities, i e. lodging, food and food services, local transportation, sightseeing etc.
2. Responsibility by name
3. An activity schedule in milestone format
4. Tangible and intangible results expected from each activity.

Table 8.1
A Tourism Marketing Plan Format

1. Situation Analysis:
 - External:
 - Environment:
 - GCC Culture
 - Islamic Religion
 - Arabic language
 - Gulf social values
 - Economic conditions in GCC countries
 - Competition
 - Internal
 - Objectives
 - Strengths and weaknesses
 - Problems and opportunities
2. Marketing Program Goals:
 - Competitive Standing
 - Financial results
 - Market share
3. Marketing Strategies
 - Positioning
 - Competitive stance
 - Usage incentive
 - Marketing Mix
 - Product
 - Distribution and delivery systems
 - Price
 - Marketing communication: advertising, promotion etc.
 - Contingency strategies
4. Marketing Budget
 - Resources (money, people, time)
 - Amount and allocation
5. Marketing Action Plan
 - Detailed breakdown of activities required
 - Responsibilities by name
 - Activity schedule in milestone format
 - Tangible and intangible results expected from each activity
6. Monitoring System
 - Ongoing situation analysis
 - Intermediate and final measures of performance
 - Variances between goals and performance triggering course correction actions

8.3 A Model of Perceived Service Quality

This section develops a model of perceived service quality. According to this model, the total service quality is perceived by the GCC tourists as a comparison between the *expected service*, which he/she expects to get, and the *perceived service*, which the tourist has received when visiting other resorts. The model developed here is similar to those models developed by Hansen (1972), Bettman (1972), Swan and Comb (1976) and Gronroos (1982).

According to this model, shown in Figure 8-1, the provider of a service will have to match the expected service and the perceived service to each other, so that tourist satisfaction is achieved.

Clearly, the expectations are influenced by traditional marketing activities, such as advertising, promotion, PR activities, and pricing, and moreover, by previous contacts with the service, previously perceived services, as well as by traditions, ideology and word-of-mouth (Lovelock, 1991). On the other hand, the perceived service is only marginally influenced by traditional marketing activities. The contacts between the GCC tourist and the service firm (e.g. the hotel), and its contact personnel, physical/technical resources, and other tourists during the visit are much more important. In these interactions, the service is rendered to the tourist and he/ she perceives the service. The service can be broken down into two quality dimensions: *technical quality* and *functional quality*. Both dimensions are important to the tourist. For example, a tourist expects the hotel to provide comfortable accommodation. As Figure 8-1 shows, the functional quality of this service is influenced by the accessibility and appearance of the hotel; of

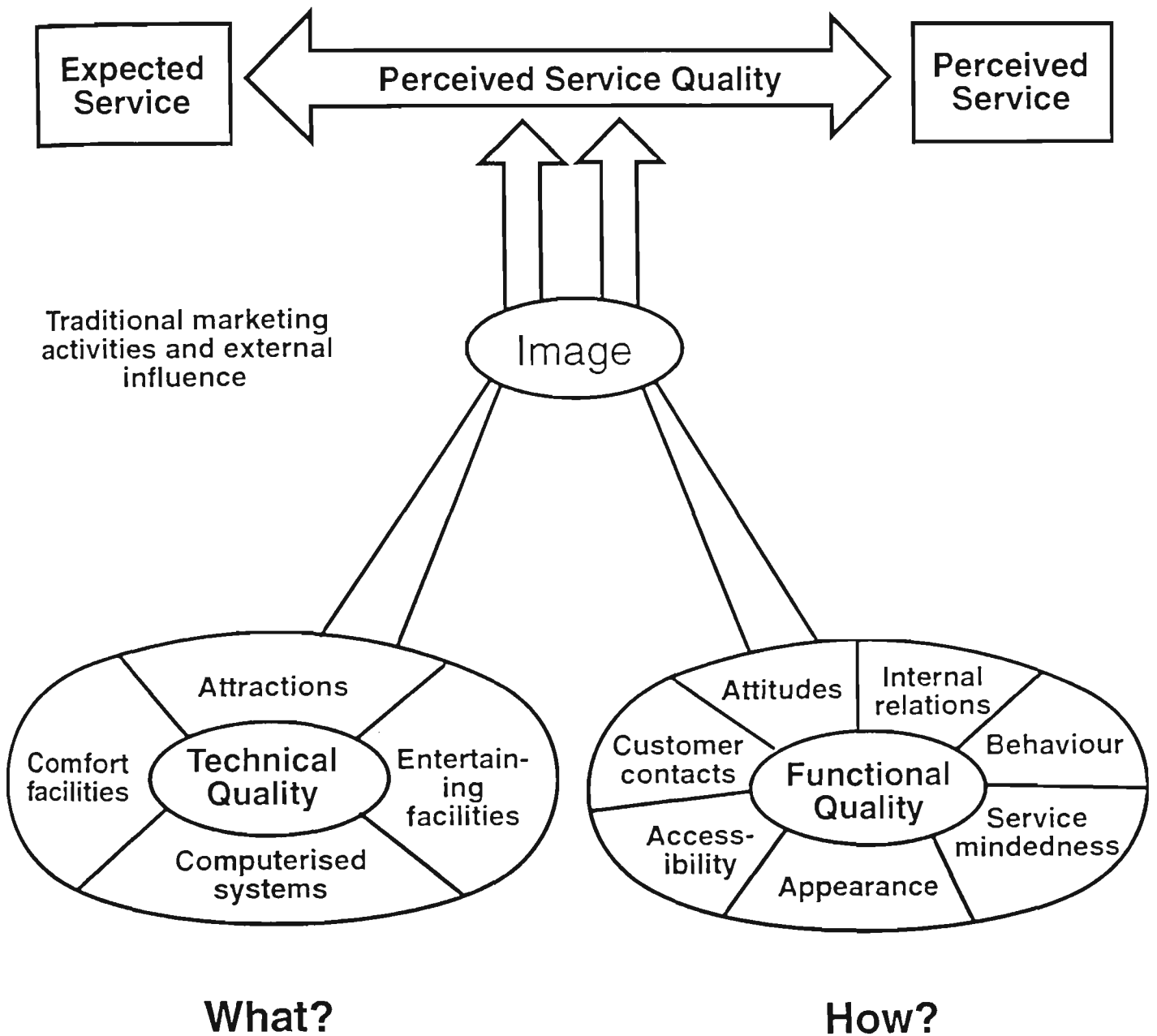


Figure 8-1
Managing the Perceived Service Quality
in Australian Tourist Resorts

long-run tourist contacts, internal relations in the hotel, and the attitudes, behavior and service mindedness of the contact personnel. The image of the hotel is a result of how the tourist perceives the technical and the functional quality dimensions. The following section examines how Australian hotels may improve their image to GCC tourists, in the light of the statistical results of previous chapters.

8.3.1 Application of the Perceived Model of Service Quality to Australian Hotels Accommodating Potential GCC Tourists

According to the statistical analysis of previous chapters, Australia as a tourist resort did not rank very high by GCC consumers on the comfort and entertainment attributes. These two attributes are closely related to the services offered by the Australian hotels. These hotels should develop a relaxing holiday atmosphere and have the GCC guests enjoy themselves. Staff, facilities and foods should all contribute to the achievement of this goal. Personnel has to be trained so well as to understand where the guests are coming from and what criteria they have. The goal is to obtain a very high level of rebooking among GCC tourists. If the guests are going to come back again, the resort has to hook them by making sure the product is right. These tourists may need extra touches, extra amenities and extra services. The following points may help these hotels formulate a more effective marketing strategy in attracting GCC consumers.

A key element in marketing Australian hotel services in GCC countries is to use computerized reservation services. This is a way to capitalize on brand image. With such systems, a GCC tourist can book rooms in any city in the

Australian content where the hotel chain has a presence with one phone call. This ease of use leads travelers to favor such hotel chains as Hayatt or Hilton, giving them a competitive edge over the isolated hotels.

GCC consumers expect top-notch service. This service is both labor intensive and requires considerable training. Around-the-clock room service and a business center for sending international messages and translating documents are examples of the expected level of service. Also, most married couples coming from the GCC prefer rooms with “double” rather than “twin” beds. Also, Muslims use special “toilet” facilities.

Many Muslims are concerned about the type of food they eat. They shun pork meat and prefer “halal” meat (i.e. meat of animal slaughtered in accordance with Islamic laws). The GCC consumers also prefer lamb to beef and are becoming increasingly more interested in seafood. Moreover, a good number of GCC consumers prefer “open-buffet” to “a la carte” menu.

Moreover, most, but not all, GCC consumers do not touch alcoholic drinks. In fact, some of the Muslim fundamentalists would not sit in places where alcoholic drinks are served. Thus, a variety of soft drinks and hot beverages would make these tourists feel close to home. However, some of the GCC consumers might be eager to feel free and indulge in alcoholic drinks while touring in a Western society.

Furthermore, a large number of GCC tourists, particularly the elders, adhere to Islamic teachings, even while touring in a Western society (Elits, 1982). Such persons would like to perform the five daily prayers. Since Muslims must direct their face towards Mecca, in Saudi Arabia, they would feel happy, if their hotel rooms were equipped with signs showing direction towards Mecca. Many five Star hotels in the

Middle East and Asia have these signs. Australian hotels need to give attention to this element of “comfort”

Also, it is possible those schools’ long vacation fall in the religious month of “Ramadhan”. Since most of the GCC consumers who adhere to Islamic religion, refrain from eating or drinking between sunrise and sunset each day of the month, a special breakfast meal, rich with oriental foods and served at sunset, would make the GCC tourists feel quite comfortable.

Night entertainment is of special importance to GCC tourists. Because of language and cultural differences, many of these tourists would not be too keen on watching normal television programs or Australian movies (Almaney, 1981). A special video channel, which shows Arabic movies, or foreign movies with Arabic transcripts, could be highly entertaining, particularly, for the elderly tourists with young children. Young single men, on the other hand, are more likely to be attracted to discos, nightclubs and live entertainment. GCC tourists rank high a hotel that supplies a spectrum number of services.

The perceived quality of hotel service will be the result of an evaluation process in which GCC tourists compare their perceptions of service delivery and its outcome against what they expected. Zeithaml , Berry and Parsuraman (1990) identified ten criteria used by consumers in evaluating service quality. A modified version of their criteria is exhibited in Table 8-2.. The management task is to balance customer expectations and perceptions and to close any gaps between the two.

Table 8-2
Dimensions Used by GCC Tourists in Evaluating Hotel Service Quality

Dimension	Definition	Examples of Questions A GCC Tourist Might Raise
Credibility	Trustworthiness, believability Honesty of the service provider	Does the hotel have a good reputation? Am I pressed to go on a Particular tour or to use the service of a particular Taxi or Carrier?
Security	Freedom from danger, risk or doubt	Is it safe to leave my valuables in my room?
Access	Approachability and ease of Contact	Is the hotel convenient located?
Communication	Listening to tourists and keeping Them informed in a language they Can understand	When I have a complaint, is the manager willing to listen to me? Is there an interpreter, if I can not express myself in local language?
Understanding the Tourist	Making the effort to know tourists and their needs	Does someone in the hotel recognizes that I am a Muslim And I do not drink?
Tangibles	Appearance of physical facilities Equipment, personnel and Communication materials	Are the hotel facilities attractive? Are their signs to direct me to Mecca for praying? Does the room have suitable toilet facilities for a Muslim?
Reliability	Ability to perform the promised Service dependability and Accurately	Is my booking reconfirmed? Is my food pork-free? Have we got a queen-size double-bed as requested?
Responsiveness	Willingness to help customers And provide prompt service	When there is a problem, does the hotel resolve it quickly?
Competence	Possession of the skills and knowledge required to Perform the service	Is the hotel able to obtain the information I need?
Courtesy	Politeness and friendliness personnel	Are the phone operators contact consistently polite?

8.4 The Marketing-Mix of Australian Tourism Industry

The design, implementation and evaluation of the marketing mix constitute the bulk of a company's marketing effort. This section will discuss the four elements of the marketing mix as related to the Australian tourism marketing to GCC consumers.

8.4.1.The Product

What does Australia offer? This is the basic question asked by a GCC potential tourist when he/she is recommended to spend his/her next vacation in Australia. Central to tourist marketing is the image which potential tourists hold of a destination and its competitors. Australia should not compete only on the bases of its natural scenes (e.g. Ayres Rock, the Barrier Reef, Blue Mountains, long beaches with golden sand, the natural falls and rivers). Or, on the basis of man-made wonders (e.g. the Harper Bridge, the Opera house, the green fields and the clean parks). Or on the basis of places that may interest the to Arab tourists (e.g. Mosques, Lebanese restaurants) or its unique social values (i.e. Multiculturalism). The Australia Tourist Bureaus need to manage the product ingredient includes planning and developing the right services to be marketed by the tourist industry. Strategies are needed for changing existing services, adding new ones and taking other actions that affect the assortment of services offered. For example, the Queensland Tourist Bureaus may arrange visits to Queensland farms, where GCC tourists enjoy the unusual experience of living with farmers in rural Australia. Most GCC tourists, coming from a desert climate, would like this product that gives them good memories to bring back home. Another tourism

product that may appeal to GCC tourists, is the language assistance when using local facilities, especially shopping. Other examples of innovative products may include: budget-priced hotels, for the cost-minded GCC tourist; all-suite hotels for the GCC tourist wanting a “home away from home and special resorts for GCC tourists wishing to “get away from it all”. Children attractions are of special concern to GCC families, as our surveys show. . Products such as “Wonderland in Sydney” and “Sea-world” in the Gold Coast would be of particular interest to GCC tourists with young children. Arab women are especially attracted to Parks, but prefer a high degree of privacy. An upgrading of parking facilities in Australian capital cities could prove very rewarding.

As was discussed before, product planning and management of service quality are critical to the Australian tourist industry. Services quality that does not meet the GCC tourists’ expectations can result in lost interest from present tourists and a failure to attract new tourists.

8.4.2.International Promotion: Advertising

Promotion is, perhaps, the most visible as well as the most culture bound of marketing functions of tourism. The surveys conducted by the Researcher suggest that many GCC consumers do not know much about Australia. With the promotional function, Australia as a tourist resort is standing up and speaking out, wanting to be seen and heard. Promotion of Australia as a potential resort for GCC consumers aims at selling Australia’s main attractions and enhancing the country’s image.

Various forms of promotion play a key role in international marketing. However, advertising is regarded the most important key element of the communications mix in the case of marketing tourism (Hennessey, 1992). This section will, therefore concentrate on international advertising by Australian Tourist Bureaus to attract GCC tourists.

Advertising is the paid communication of company messages through impersonal media. The message may be audio, as in radio, visual, as in billboards or magazines; or audiovisual, as in television or cinema advertising (Terpstra and Sarathy, 1994).

Language is a major factor to consider in today's international communications strategy. The language barrier has two aspects: faulty translation and typesetting errors. Literal transformations performed outside of the GCC should be avoided. The Tourist Bureaus should have any translations checked by either a local advertising agency, their own local subsidiary or an independent distributor located in one of the GCC countries.

When using international advertising, the Australian Tourist Bureaus should also be aware of both cultural aspects: the product's use and the message employed. To ensure that a message is in line with the existing cultural beliefs of the GCC consumers, local agencies should judge the cultural content of the message. Many ads are considered offensive by strict Muslim standards. These include:

- Adds showing women in swimming suits, revealing dresses or sleeveless dresses
- Adds showing underarms
- Adds showing tourists engaged in gambling
- Adds showing tourists having alcoholic drinks

In deciding on media selection, the Australian Tourist Bureaus should realize the following limitations when advertising in the GCC countries:

- Commercial radio and Television is still not available in some GCC countries.
- Advertisers have access to commercial television only during a few block of time, several minutes long at several time slots (Amine and Cavusgil, 1990).
- A large proportion of the population is still illiterate
- Media habits in the GCC countries are rapidly shifting towards electronic media, as ownership of radio and television receivers is becoming more common.
- Satellite television channels, which are not subject to government regulations, are widely used in all GCC countries.
- Arabic language satellite television is more attractive than the traditional national television channels in almost all GCC countries

When scheduling international advertising for GCC tourists, the Australian Tourist Bureaus, should realize that vacations in these countries are longer than in Australia and fall during Australian winter (June to September). Therefore, major media campaigns should be launched in the months of February-May. However,

many GCC countries do not favor the placement of any advertising during the religious month of Ramadhan

Although the GCC countries, share speak the same language, share the same culture and adhere to the same religion, consumer needs and interests are not homogeneous across these countries. It may, therefore, be necessary. For the Australian Tourist Bureaus to work more towards decentralizing their international advertising decision making.(Peebles, et al, 1978)

The Australian Tourist Bureaus may consider putting out brochures ranging from small folders to lavish booklets printed on expensive stock. These can be placed in travel industry publications and in general interest magazines and newspapers targeted primarily at GCC readers in selected Gulf markets. In addition, the Bureaus may consider the appointment of a specialist sales manager who direct his effort toward travel agencies and airlines. His job would include attendance at major travel agent conventions, work with airline sales personnel and sales calls on travel agents in key markets (e.g. Dubai and Bahrain). Finally, the Australian Tourist Bureaus should realize that, word-of-mouth is a very strong recommendation in the thinly populated GCC countries.

8.4.3: Pricing of Tourist Services

The results of the surveys conducted by the Researcher suggest that one of the main reasons for the relative small share of Australian tourist industry in the GCC market is the relatively high traveling expenses and living costs. Until

recently, there was no airline that has a direct service between the GCC region and Australia. There are now two airlines offering this direct service, namely: The Gulf Air and Air Emirates. A number of airlines, offer indirect connections via South East Asian Ports (Bangkok, Manila, Singapore and Jakarta). Since the downturn in oil prices, in late 1982, the Gulf Airlines (Emirates Airline, Gulf Air, Kuwaiti Airline, and Saudi Airline) entered into severe competition with each other and with outside airlines. The GCC travelers have benefited significantly from the price discount associated with this process of competition. However, these airlines followed price discrimination policies that worked in favor of only some tourist resorts. Australian resorts did not benefit much from this competition. Also, not many tourist packages are offered to GCC consumers wishing to spend their vacation in Australia. Moreover, it is much cheaper to purchase a ticket from Australia to visit GCC countries than purchase a ticket from the GCC to visit Australia. Price discrimination has been biased against GCC tourists. Thus, it is cheaper to purchase a ticket: Cairo-Dubai-Sydney-Dubai-Cairo than to purchase a ticket Dubai-Sydney-Dubai; although Dubai is much closer to Sydney than Cairo is to Sydney. In addition, Group tickets are not common between GCC cities and Australia. Since the demand for long-distance travel is price elastic, airlines serving the region should be more adept at varying their prices for tours to Australia in response to the price sensitivity in different seasons. Some special deals can be worked out between Australian Airline, Qantas, which does not land in any GCC airport, and other GCC airlines, which connect with Qantas at some Southeast Asian Airport. These deals may secure a more attractive fare to GCC tourists who elect Australian resorts.

Determining pricing strategies in a service organization requires making decisions on a range of different issues. These, in turn must be based on a clear understanding of the organization's objectives and sound information on a range of relevant inputs.

The lodging firms in Australia, for example, need to learn how sensitive the GCC tourists to different prices, what prices are charged by the competitors and what discounts should be offered from basic prices. GCC consumers dislike feeling that they have been charged for service elements that they did not use. Hence, these consumers always prefer itemization. The use of intermediaries, e.g. travel agents who make hotel bookings, is likely to offer GCC tourists greater convenience in terms of where, when and how the price should be paid. Also, Australian hotels must realize that the simplicity and speed with which payment is made are likely to influence the GCC tourist's perception of overall service quality. Credit cards and bankcards are widely used by GCC consumers. These methods of payment should be Australian lodging firms.

8.4.4 Channels of Distribution

Many tourism services are sold directly from the supplier to the consumer. No intermediaries are used when the service cannot be separated from the seller or when the service is created and marketed simultaneously. For example, hairdressing, public utilities, medical care and repair services are typically sold without intermediaries. This enables the sellers to personalize their services and to get quick, detailed customer feedback.

Some type of agent or broker is often used in marketing of tourism services such as travel arrangements, hotel accommodation, car rental, and sightseeing. The Australian Tourist Bureaus need to consolidate their channels of distribution of tourist services in the main GCC cities. An agent that enjoys the trust of the GCC consumers is Australian Embassies in the region. The first thing that comes to the mind of the GCC potential tourist is to visit the Australian Embassy in his/her capital city. Unfortunately, not all GCC countries have an Australian Embassy, despite the growing trade in goods and services between Australia and these countries. Also, the Australian embassies, when exist do not play any significant marketing role, especially in the area of promotion. It could be most rewarding if these embassies have an “open day” say once a year, to highlight Australian attractions as a potential tourist resort..

8.5 Conclusions

The main conclusions of this chapter may be summarized in the following;

1. Australian National and State Tourist Bureaus should approach the job of attracting GCC tourists from a planning point of view, beginning with an analysis of the current situation and identification of problems and opportunities.
2. The total service quality is perceived by the GCC tourists as a comparison between the *expected service*, which he/she expects to

get, and the *perceived service*, which the tourist has received when visiting other resorts.

3. The Australia Tourist Bureaus need to manage the product ingredient includes planning and developing the right services to be marketed by the tourist industry. Strategies are needed for changing existing services, adding new ones and taking other actions that affect the assortment of services offered.

4. The lodging firms in Australia need to learn how sensitive the GCC tourists to different prices, what prices are charged by the competitors and what discounts should be offered from basic prices.

5. The Australian Tourist Bureaus need to consolidate their channels of distribution of tourist services in the main GCC cities. Also, the Australian embassies in the GCC countries need to play a more aggressive role in promoting Australia's image as a tourist resort to GCC consumers.

CHAPTER NINE

CONCLUSIONS

The main conclusions of this thesis may be summarized in the following

1. An analysis of the determinants of aggregate demand by GCC tourists suggests that:

- GCC consumers spend a significant proportion of their incomes on tourism. The high standards of living enjoyed by the nationals of these countries, lack of adequate domestic resorts, the harsh weather conditions in summer, continuous contact with foreigners, restrictive domestic social systems and search for business and marketing opportunities overseas are major motives for GCC citizens to spend their vacations overseas.
- Oil exports are the major determinant of aggregate spending on tourism by members of the GCC. The impact of changes in oil exports on tourism spending is, however, subject to a partial adjustment mechanism. A shock in the oil market requires some 3.5 years to close the gap between the desired level of spending on tourism and the previous level.
- The interaction between the GCC economies and the rest of the world plays an important role in determining these countries' aggregate demand for tourism.
- There is a significant feedback effect to tourism spending by the GCC. This spending represents an increase in the export of services of the

tourist resorts. This results in a rise in the incomes of the visited countries. This, in turn increases their imports, including oil imports. The increase in oil imports results in an increase in incomes of the GCC countries.

2. The results of a survey conducted by the Researcher in three Gulf cities, namely Kuwait, Riyadh and Dubai, and based on random samples of 385 respondents in each city suggest that:

- The GCC consumers evaluated tourist resorts on 20 criteria. These criteria are: traveling expenses; tourist packages; natural scenes; unique features; family attractions; weather; cost of accommodation; cost of living at resort; children attractions; night entertainment; knowledge of places to visit and see; shopping bargains; recommendations of relatives and friends; prior information about the resort; communications with nationals; internal transport facilities and cost; service standards; medical facilities at the resort; adventures and memories to bring back home
- The relative importance of the considered variables varies within each member state and between states.
- There are differences in the demographic profiles of the various GCC countries, particularly household income and family size.
- Family vacation is important to the consumers of the GCC countries and that there is very little difference in the attitude of these consumers to traveling.
- A significant proportion of GCC consumers considers Australia as a tourist resort. This proportion is relatively higher in the United Arab

Emirates than in Kuwait and relatively higher in Kuwait than in Saudi Arabia.

3. Factor analysis, using the principal components method and varimax rotation, reduced the 20 explanatory variables, in each sample, to four factors having eigenvalues greater than 1.0. The results of the factor model suggest that:

- There is a high degree of similarity between the attitudes of the consumers, in the three GCC capital cities, towards tourist resorts. This is reflected in the similarity in the loading of various variables on different factors. It was possible, in all three samples, to identify the four factors as: “cost factor”; “attraction variable”; “convenience factor” and “image factor”. The “cost factor” is highly related to such variables as “traveling expenses”, “tourist packages”, and “cost of accommodation “and” cost of living at resort. The “image factor”, is related to such variables as “knowledge of places to visit and see”, “recommendations of friends and relatives”, “prior information about the resort”, “communications with nationals”, “adventures” and “memories to bring back home”.

4. The discriminant analysis of factor scores suggests that the “cost factor” and the “image factor” are the most important predictors which discriminate between GCC consumers who expressed interest to visit Australia as a tourist resort and those who did not. The “cost factor” seems to be relatively more important in discriminating between the two groups of consumers in those GCC countries with relatively lower standard of living (e.g. Saudi Arabia). The “image

factor”, on the other hand, plays a stronger role in discriminating between the two groups in the relatively richer GCC states (e.g. the United Arab Emirates).

5. Discriminant analysis shows that it is possible to separate the two groups of GCC consumers (those interested to visit Australia as a tourist resort and those who are not) on the basis of some demographic variables, attitude towards travel and importance of family vacation. Income and attitude towards travel seem to be the most important variables that discriminate between the two groups of consumers. This may be due to the traveling costs and the distance. Traveling expenses to Australia are much higher than those to other neighboring tourist resorts (e.g. Egypt, Turkey, Europe) and the distance only appeals to those who love traveling. Family size and age seem to play a negative role in selecting Australia as a tourist resort.

6. The results of the surveys conducted by the Researcher in the three Gulf States identified 13 most popular resorts visited by GCC tourists in 1988. Each of these resorts was visited by at least 4 percent of the GCC tourists in that year.

- Over 35 percent of Gulf tourists elected to spend their vacation in neighboring Arab countries (*Egypt, Lebanon, Morocco and Tunisia*). A large percentage of GCC tourists (17.8 %) chose Egypt as their most preferred resort. Lebanon was the second most preferred neighboring resort. The ranking of Lebanon has changed significantly following the Civil War in that country.
- Though not an Arab country, *Turkey* has grown to be a popular tourist resort for the Gulf consumers. Its closeness and similar culture gained her a special position amongst tourist resorts.

- Approximately 30 percent of the GCC tourists spent their 1998 vacation in Europe (*England, France, Spain and other European resorts*). England seems to be the most popular European tourist resort, followed by Spain.
- *South East Asian* resorts are popular places, but not as popular as neighboring Arab countries.
- The GCC tourists travel as far as *USA, Australia and South America*. The USA seems to be a much more attractive tourist resort than Australia, though the both resorts are of similar distance to most GCC countries.

7. According to the results of the cluster analysis the 13 most popular tourist resorts visited by GCC residents can be grouped into four clusters based on five predictors: “Travelling Cost”; “Living Expenses”; “Entertainment”; “Comfort”; “Attractions and adventures”

- The Cluster membership table suggests the following grouping:
 - I. Cluster 1: Morocco, Tunisia and South East Asia
 - II. Cluster 2: Egypt, Lebanon and Turkey
 - III. Cluster 3: Spain, UK, France and other European resorts
 - IV. Cluster 4: USA, Australia and South America

8. Multiple Discriminant Analysis identified three discriminant functions. The standardized canonical discriminant function coefficients and the group centroids suggest that GCC tourists, who visit Morocco, Tunisia and South East Asia, attach great importance to “entertainment. The results also suggest that GCC consumers who visit Egypt, Lebanon and Turkey attach more importance to travelling and living expenses. Multiple Discriminant Analysis also suggests that GCC tourists

who elect to visit Spain, France, UK and Other European resorts do so for comfort. Also the results suggest that GCC tourists who visit USA, Australia and South America do so for attractions and adventure.

9. The Australian Tourist Bureau and the Australian tourist industry should work out a marketing strategy where price and promotion are given the leading role in order to attract more tourists from the GCC. In particular:

- .Australian National and State Tourist Bureaus should approach the job of attracting GCC tourists from a planning point of view, beginning with an analysis of the current situation and identification of problems and opportunities.
- The total service quality is perceived by the GCC tourists as a comparison between the *expected service*, which he/she expects to get, and the *perceived service*, which the tourist has received when visiting other resorts.
- The Australia Tourist Bureaus need to manage the product ingredient includes planning and developing the right services to be marketed by the tourist industry. Strategies are needed for changing existing services, adding new ones and taking other actions that affect the assortment of services offered.
- The lodging firms in Australia need to learn how sensitive the GCC tourists to different prices, what prices are charged by the competitors and what discounts should be offered from basic prices.
- . The Australian Tourist Bureaus need to consolidate their channels of distribution of tourist services in the main GCC cities. Also, the Australian embassies in the GCC countries need to play a more

aggressive role in promoting Australia's image as a tourist resort to GCC consumers.

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APPENDICES

APPENDIX 1

SUMMARY OF SURVEY RESULTS

Table 2

SUMMARY OF SURVEY RESULTS FOR KUWAIT

V1 Importance of "travelling expenses"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	41	10.6	10.6	10.6
of little importance	2	87	22.6	22.6	33.2
important	3	71	18.4	18.4	51.7
very important	4	144	37.4	37.4	89.1
extremely important	5	42	10.9	10.9	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.153	Std dev	1.201		

V2 Importance of "tourist packages"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	46	11.9	11.9	11.9
of little importance	2	78	20.3	20.3	32.2
important	3	61	15.8	15.8	48.1
very important	4	118	30.6	30.6	78.7
extremely important	5	82	21.3	21.3	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.291	Std dev	1.326		

V3 Importance of "natural scenes"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	22	5.7	5.7	5.7
of little importance	2	81	21.0	21.0	26.8
important	3	97	25.2	25.2	51.9
very important	4	105	27.3	27.3	79.2
extremely important	5	80	20.8	20.8	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.364	Std dev	1.189		

V4 Importance of "unique features"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	34	8.8	8.8	8.8

not important at all	1	99	25.7	25.7	34.5
of little importance	2	106	27.5	27.5	62.1
important	3	106	27.5	27.5	89.6
very important	4	40	10.4	10.4	100.0
extremely important	5				

Total	385	100.0	100.0
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Mean 3.049 Std dev 1.141

V5 Importance of "family attractions"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	22	5.7	5.7	5.7
of little importance	2	93	24.2	24.2	29.9
important	3	100	26.0	26.0	55.8
very important	4	123	31.9	31.9	87.8
extremely important	5	47	12.2	12.2	100.0
Total		385	100.0	100.0	

Mean 3.208 Std dev 1.113

V6 Importance of "weather"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	26	6.8	6.8	6.8
of little importance	2	32	8.3	8.3	15.1
important	3	266	69.1	69.1	84.2
very important	4	49	12.7	12.7	96.9
extremely important	5	12	3.1	3.1	100.0
Total		385	100.0	100.0	

Mean 2.971 Std dev .778

V7 Importance of "cost of accommodation"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	87	22.6	22.6	22.6
of little importance	2	119	30.9	30.9	53.5
important	3	61	15.8	15.8	69.4
very important	4	12	3.1	3.1	72.5
extremely important	5	106	27.5	27.5	100.0
Total		385	100.0	100.0	

Mean 2.821 Std dev 1.523

V8 Importance of "cost of living at resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	23	6.0	6.0	6.0
of little importance	2	94	24.4	24.4	30.4
important	3	99	25.7	25.7	56.1
very important	4	125	32.5	32.5	88.6
extremely important	5	44	11.4	11.4	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.190	Std dev	1.110		

V9 Importance of "children attractions"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	30	7.8	7.8	7.8
of little importance	2	55	14.3	14.3	22.1
important	3	116	30.1	30.1	52.2
very important	4	42	10.9	10.9	63.1
extremely important	5	142	36.9	36.9	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.548	Std dev	1.320		

V10 Importance of "night entertainment"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	26	6.8	6.8	6.8
of little importance	2	81	21.0	21.0	27.8
important	3	71	18.4	18.4	46.2
important	4	139	36.1	36.1	82.3
extremely impotant	5	68	17.7	17.7	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.369	Std dev	1.190		

V11 Importance of "knowlege of places to visit and see"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	42	10.9	10.9	10.9
important	3	85	22.1	22.1	33.0
very important	4	72	18.7	18.7	51.7
extremely important	5	186	48.3	48.3	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	4.044	Std dev	1.068		

v12 Importance of "shopping bargains"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	49	12.7	12.7	12.7
important	3	77	20.0	20.0	32.7
very important	4	67	17.4	17.4	50.1
extremely important	5	192	49.9	49.9	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	4.044	Std dev	1.100		

v13 Importance of "recommendations of relatives and friends"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	23	6.0	6.0	6.0
of little importance	2	78	20.3	20.3	26.2
important	3	106	27.5	27.5	53.8
very important	4	104	27.0	27.0	80.8
extremely important	5	74	19.2	19.2	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.332	Std dev	1.172		

v14 Importance of "prior information about the resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	37	9.6	9.6	9.6
of little importance	2	99	25.7	25.7	35.3
important	3	104	27.0	27.0	62.3
very important	4	108	28.1	28.1	90.4
extremely important	5	37	9.6	9.6	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.023	Std dev	1.144		

v15 Importance of "communications with nationals"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	22	5.7	5.7	5.7
of little importance	2	97	25.2	25.2	30.9
important	3	97	25.2	25.2	56.1
very important	4	123	31.9	31.9	88.1
extremely important	5	46	11.9	11.9	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	

Mean 3.192 Std dev 1.115

V16 Importance of "internal transport facilities and cost"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	20	5.2	5.2	5.2
important	3	28	7.3	7.3	12.5
very important	4	282	73.2	73.2	85.7
Extremely important	5	55	14.3	14.3	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.966	Std dev	.651		

V17 Importance of "service standards"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	76	19.7	19.7	19.7
important	3	109	28.3	28.3	48.1
very important	4	67	17.4	17.4	65.5
extremely important	5	133	34.5	34.5	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.668	Std dev	1.145		

V18 Importance of "medical facilities at resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	27	7.0	7.0	7.0
important	3	93	24.2	24.2	31.2
very important	4	96	24.9	24.9	56.1
extremely important	5	169	43.9	43.9	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	4.057	Std dev	.980		

V19 Importance of "adventures"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	33	8.6	8.6	8.6
of little importance	2	55	14.3	14.3	22.9
important	3	122	31.7	31.7	54.5
very important	4	42	10.9	10.9	65.5

extremely important	5	133	34.5	34.5	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.486	Std dev	1.321		

V20 Memories to bring back home

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	29	7.5	7.5	7.5
of little importance	2	80	20.8	20.8	28.3
important	3	74	19.2	19.2	47.5
very important	4	139	36.1	36.1	83.6
extremely important	5	63	16.4	16.4	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.330	Std dev	1.191		

HOUSEHOLDINCOME

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	2300.00	3	.8	.8	.8
	2340.00	1	.3	.3	1.0
	2600.00	1	.3	.3	1.3
	2650.00	1	.3	.3	1.6
	2800.00	1	.3	.3	1.8
	2830.00	1	.3	.3	2.1
	2890.00	1	.3	.3	2.3
	2900.00	1	.3	.3	2.6
	2980.00	5	1.3	1.3	3.9
	2990.00	1	.3	.3	4.2
	3000.00	17	4.4	4.4	8.6
	3030.00	1	.3	.3	8.8
	3040.00	6	1.6	1.6	10.4
	3050.00	14	3.6	3.6	14.0
	3060.00	1	.3	.3	14.3
	3070.00	3	.8	.8	15.1
	3080.00	3	.8	.8	15.8
	3090.00	6	1.6	1.6	17.4
	3100.00	27	7.0	7.0	24.4
	3120.00	4	1.0	1.0	25.5
	3140.00	2	.5	.5	26.0
	3160.00	5	1.3	1.3	27.3
	3180.00	4	1.0	1.0	28.3
	3190.00	4	1.0	1.0	29.4
	3200.00	25	6.5	6.5	35.8
	3210.00	4	1.0	1.0	36.9
	3240.00	10	2.6	2.6	39.5
	3270.00	6	1.6	1.6	41.0
	3300.00	31	8.1	8.1	49.1
	3310.00	2	.5	.5	49.6
	3320.00	12	3.1	3.1	52.7
	3350.00	15	3.9	3.9	56.6
	3360.00	3	.8	.8	57.4
	3380.00	6	1.6	1.6	59.0
	3390.00	10	2.6	2.6	61.6
	3420.00	3	.8	.8	62.3

3490.00	3	.8	.8	63.1
3500.00	1	.3	.3	63.4
3600.00	10	2.6	2.6	66.0
3650.00	2	.5	.5	66.5
3670.00	2	.5	.5	67.0
3680.00	4	1.0	1.0	68.1
3700.00	9	2.3	2.3	70.4
3800.00	4	1.0	1.0	71.4
3810.00	2	.5	.5	71.9
3840.00	2	.5	.5	72.5
3850.00	5	1.3	1.3	73.8
3870.00	3	.8	.8	74.5
3900.00	7	1.8	1.8	76.4
3940.00	2	.5	.5	76.9
3960.00	2	.5	.5	77.4
4050.00	1	.3	.3	77.7
4350.00	1	.3	.3	77.9
4390.00	1	.3	.3	78.2
4500.00	1	.3	.3	78.4
4600.00	2	.5	.5	79.0
4680.00	2	.5	.5	79.5
4800.00	1	.3	.3	79.7
4850.00	2	.5	.5	80.3
4890.00	1	.3	.3	80.5
4900.00	2	.5	.5	81.0
4950.00	1	.3	.3	81.3
5010.00	1	.3	.3	81.6
5080.00	1	.3	.3	81.8
5100.00	4	1.0	1.0	82.9
5140.00	2	.5	.5	83.4
5200.00	5	1.3	1.3	84.7
5300.00	6	1.6	1.6	86.2
5320.00	2	.5	.5	86.8
5350.00	1	.3	.3	87.0
5380.00	1	.3	.3	87.3
5390.00	1	.3	.3	87.5
5430.00	1	.3	.3	87.8
5470.00	2	.5	.5	88.3
5490.00	1	.3	.3	88.6
5500.00	2	.5	.5	89.1
5570.00	1	.3	.3	89.4
5670.00	1	.3	.3	89.6
5750.00	1	.3	.3	89.9
5800.00	4	1.0	1.0	90.9
5840.00	1	.3	.3	91.2
5860.00	1	.3	.3	91.4
5870.00	1	.3	.3	91.7
5900.00	3	.8	.8	92.5
5980.00	1	.3	.3	92.7
6000.00	4	1.0	1.0	93.8
6040.00	3	.8	.8	94.5
6050.00	1	.3	.3	94.8
6090.00	2	.5	.5	95.3
6100.00	4	1.0	1.0	96.4
6200.00	1	.3	.3	96.6
6300.00	2	.5	.5	97.1
6350.00	1	.3	.3	97.4
6500.00	1	.3	.3	97.7
6600.00	2	.5	.5	98.2
6800.00	1	.3	.3	98.4
6850.00	1	.3	.3	98.7
6890.00	2	.5	.5	99.2
6900.00	2	.5	.5	99.7
7860.00	1	.3	.3	100.0
Total		385	100.0	100.0

Mean 3808.701 Std dev 1059.278

TRAVEL is travelling important to you?

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1.00	9	2.3	2.3	2.3
of little importance	2.00	25	6.5	6.5	8.8
important	3.00	204	53.0	53.0	61.8
very important	4.00	82	21.3	21.3	83.1
extremely important	5.00	65	16.9	16.9	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	3.439	Std dev	.925		

VACATION Is family vacation important?

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2.00	29	7.5	7.5	7.5
important	3.00	70	18.2	18.2	25.7
very important	4.00	156	40.5	40.5	66.2
extremely important	5.00	130	33.8	33.8	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	4.005	Std dev	.907		

FAMILY SIZE

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	1.00	27	7.0	7.0	7.0
	2.00	34	8.8	8.8	15.8
	3.00	98	25.5	25.5	41.3
	4.00	34	8.8	8.8	50.1
	5.00	32	8.3	8.3	58.4
	6.00	32	8.3	8.3	66.8
	7.00	43	11.2	11.2	77.9
	8.00	65	16.9	16.9	94.8
	9.00	20	5.2	5.2	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	4.878	Std dev	2.430		

AGE

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	28.00	4	1.0	1.0	1.0
	29.00	14	3.6	3.6	4.7
	30.00	13	3.4	3.4	8.1
	31.00	28	7.3	7.3	15.3
	32.00	18	4.7	4.7	20.0
	33.00	14	3.6	3.6	23.6

34.00	13	3.4	3.4	27.0
36.00	9	2.3	2.3	29.4
37.00	3	.8	.8	30.1
38.00	20	5.2	5.2	35.3
39.00	34	8.8	8.8	44.2
40.00	5	1.3	1.3	45.5
41.00	4	1.0	1.0	46.5
42.00	11	2.9	2.9	49.4
43.00	6	1.6	1.6	50.9
44.00	11	2.9	2.9	53.8
45.00	14	3.6	3.6	57.4
46.00	11	2.9	2.9	60.3
47.00	8	2.1	2.1	62.3
48.00	18	4.7	4.7	67.0
49.00	5	1.3	1.3	68.3
50.00	3	.8	.8	69.1
51.00	26	6.8	6.8	75.8
52.00	16	4.2	4.2	80.0
53.00	8	2.1	2.1	82.1
54.00	14	3.6	3.6	85.7
55.00	8	2.1	2.1	87.8
56.00	8	2.1	2.1	89.9
57.00	5	1.3	1.3	91.2
58.00	7	1.8	1.8	93.0
59.00	2	.5	.5	93.5
61.00	2	.5	.5	94.0
63.00	2	.5	.5	94.5
64.00	5	1.3	1.3	95.8
65.00	2	.5	.5	96.4
66.00	1	.3	.3	96.6
67.00	2	.5	.5	97.1
68.00	1	.3	.3	97.4
69.00	3	.8	.8	98.2
70.00	1	.3	.3	98.4
71.00	3	.8	.8	99.2
73.00	1	.3	.3	99.5
75.00	2	.5	.5	100.0
Total	385	100.0	100.0	

Mean 43.714 Std dev 10.588

Table 3

SUMMARY OF SURVEY RESULTS FOR SAUDI ARABIA

V1 Importance of "travelling expenses"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	41	10.6	10.6	10.6
important	3	87	22.6	22.6	33.2
very important	4	71	18.4	18.4	51.7
extremely important	5	186	48.3	48.3	100.0
	Total	385	100.0	100.0	
Mean	4.044	Std dev	1.066		

V2 Importance of "tourist packages"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	43	11.2	11.2	11.2
important	3	78	20.3	20.3	31.4
very important	4	66	17.1	17.1	48.6
extremely important	5	198	51.4	51.4	100.0
	Total	385	100.0	100.0	
Mean	4.088	Std dev	1.076		

V3: Importance of "natural scenes"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	25	6.5	6.5	6.5
of little importance	2	81	21.0	21.0	27.5
important	3	95	24.7	24.7	52.2
very important	4	106	27.5	27.5	79.7
extremely important	5	78	20.3	20.3	100.0
	Total	385	100.0	100.0	
Mean	3.340	Std dev	1.202		

V4 Importance of "Unique features"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	36	9.4	9.4	9.4
of little importance	2	99	25.7	25.7	35.1
important	3	108	28.1	28.1	63.1
very important	4	103	26.8	26.8	89.9

extremely important	5	39	10.1	10.1	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	3.026	Std dev	1.143		

v5 Importance of "family attractions"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	25	6.5	6.5	6.5
of little importance	2	94	24.4	24.4	30.9
important	3	99	25.7	25.7	56.6
very important	4	120	31.2	31.2	87.8
extremely important	5	47	12.2	12.2	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	3.182	Std dev	1.129		

V6 Importance of "weather"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	26	6.8	6.8	6.8
of little importance	2	39	10.1	10.1	16.9
important	3	260	67.5	67.5	84.4
very important	4	48	12.5	12.5	96.9
extremely important	5	12	3.1	3.1	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	2.951	Std dev	.787		

V7 Importance of "cost of accommodation"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	11	2.9	2.9	2.9
important	3	85	22.1	22.1	24.9
very important	4	112	29.1	29.1	54.0
extremely important	5	177	46.0	46.0	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	4.182	Std dev	.874		

V8 Importance of "cost of living at resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
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of little importance	2	23	6.0	6.0	6.0
important	3	94	24.4	24.4	30.4
very important	4	99	25.7	25.7	56.1
extremely important	5	169	43.9	43.9	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	4.075	Std dev	.959		

v9 Importance of "children attractions"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	30	7.8	7.8	7.8
of little importance	2	56	14.5	14.5	22.3
important	3	116	30.1	30.1	52.5
very important	4	47	12.2	12.2	64.7
extremely important	5	136	35.3	35.3	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	3.527	Std dev	1.311		

v10 Importance of "night entertainment"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	28	7.3	7.3	7.3
of little importance	2	79	20.5	20.5	27.8
important	3	76	19.7	19.7	47.5
very important	4	135	35.1	35.1	82.6
extremely important	5	67	17.4	17.4	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	3.348	Std dev	1.194		

v11 Importance of "knowlege of places to visit and see"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	42	10.9	10.9	10.9
of little importance	2	89	23.1	23.1	34.0
important	3	71	18.4	18.4	52.5
very important	4	136	35.3	35.3	87.8
extremely important	5	47	12.2	12.2	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	3.148	Std dev	1.221		

v12 Importance of "shopping bargains"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	51	13.2	13.2	13.2
of little importance	2	78	20.3	20.3	33.5
important	3	66	17.1	17.1	50.6
very important	4	123	31.9	31.9	82.6
extremely important	5	67	17.4	17.4	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.200	Std dev	1.309		

V13 Importance of "recommendations of relatives and friends"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	25	6.5	6.5	6.5
of little importance	2	78	20.3	20.3	26.8
important	3	108	28.1	28.1	54.8
very important	4	101	26.2	26.2	81.0
extremely important	5	73	19.0	19.0	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.309	Std dev	1.179		

V14 Importance of "prior information about the resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	41	10.6	10.6	10.6
of little importance	2	97	25.2	25.2	35.8
important	3	105	27.3	27.3	63.1
very important	4	106	27.5	27.5	90.6
extremely important	5	36	9.4	9.4	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	2.997	Std dev	1.154		

V15 Importance of "communications with nationals"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	119	30.9	30.9	30.9
of little importance	2	97	25.2	25.2	56.1
important	3	123	31.9	31.9	88.1
very important	4	46	11.9	11.9	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	2.249	Std dev	1.023		

V16 Importance of "internal transport facilities and cost"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	20	5.2	5.2	5.2
of little importance	2	38	9.9	9.9	15.1
important	3	272	70.6	70.6	85.7
very important	4	43	11.2	11.2	96.9
extremely important	5	12	3.1	3.1	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	2.971	Std dev	.737		

V17 Importance of "service standards"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	80	20.8	20.8	20.8
of little importance	2	106	27.5	27.5	48.3
important	3	66	17.1	17.1	65.5
very important	4	45	11.7	11.7	77.1
extremely important	5	88	22.9	22.9	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	2.883	Std dev	1.459		

V18 Importance of "medical facilities at resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	28	7.3	7.3	7.3
of little importance	2	96	24.9	24.9	32.2
important	3	96	24.9	24.9	57.1
very important	4	126	32.7	32.7	89.9
extremely important	5	39	10.1	10.1	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.135	Std dev	1.121		

V19 Importance of "adventures"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	211	54.8	54.8	54.8
of little importance	2	42	10.9	10.9	65.7
important	3	132	34.3	34.3	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	1.795	Std dev	.923		

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	32	8.3	8.3	8.3
of little importance	2	79	20.5	20.5	28.8
important	3	75	19.5	19.5	48.3
very important	4	137	35.6	35.6	83.9
extremely important	5	62	16.1	16.1	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.306	Std dev	1.203		

HOUSEHOLD INCOME

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	1000.00	2	.5	.5	.5
	1040.00	1	.3	.3	.8
	1050.00	2	.5	.5	1.3
	1090.00	1	.3	.3	1.6
	1100.00	1	.3	.3	1.8
	1140.00	1	.3	.3	2.1
	1200.00	2	.5	.5	2.6
	1300.00	4	1.0	1.0	3.6
	1340.00	1	.3	.3	3.9
	1350.00	1	.3	.3	4.2
	1450.00	1	.3	.3	4.4
	1500.00	3	.8	.8	5.2
	1600.00	4	1.0	1.0	6.2
	1650.00	1	.3	.3	6.5
	1680.00	1	.3	.3	6.8
	1700.00	1	.3	.3	7.0
	1750.00	1	.3	.3	7.3
	1800.00	5	1.3	1.3	8.6
	1830.00	3	.8	.8	9.4
	1850.00	1	.3	.3	9.6
	1870.00	1	.3	.3	9.9
	1890.00	4	1.0	1.0	10.9
	1900.00	5	1.3	1.3	12.2
	1980.00	5	1.3	1.3	13.5
	1990.00	3	.8	.8	14.3
	2000.00	17	4.4	4.4	18.7
	2030.00	1	.3	.3	19.0
	2040.00	8	2.1	2.1	21.0
	2050.00	11	2.9	2.9	23.9
	2060.00	1	.3	.3	24.2
	2070.00	3	.8	.8	24.9
	2080.00	3	.8	.8	25.7
	2090.00	6	1.6	1.6	27.3
	2100.00	28	7.3	7.3	34.5
	2120.00	3	.8	.8	35.3
	2140.00	2	.5	.5	35.8
	2160.00	5	1.3	1.3	37.1
	2180.00	4	1.0	1.0	38.2
	2190.00	6	1.6	1.6	39.7
	2200.00	24	6.2	6.2	46.0
	2210.00	4	1.0	1.0	47.0
	2220.00	1	.3	.3	47.3
	2240.00	10	2.6	2.6	49.9
	2270.00	6	1.6	1.6	51.4
	2300.00	32	8.3	8.3	59.7
	2310.00	2	.5	.5	60.3

HOUSEHOLD INCOME

2320.00	10	2.6	2.6	62.9
2350.00	14	3.6	3.6	66.5
2360.00	3	.8	.8	67.3
2380.00	5	1.3	1.3	68.6
2390.00	9	2.3	2.3	70.9
2420.00	2	.5	.5	71.4
2490.00	3	.8	.8	72.2
2500.00	1	.3	.3	72.5
2600.00	9	2.3	2.3	74.8
2650.00	2	.5	.5	75.3
2670.00	2	.5	.5	75.8
2680.00	2	.5	.5	76.4
2700.00	8	2.1	2.1	78.4
2800.00	2	.5	.5	79.0
2810.00	2	.5	.5	79.5
2840.00	2	.5	.5	80.0
2850.00	3	.8	.8	80.8
2870.00	2	.5	.5	81.3
2900.00	7	1.8	1.8	83.1
2940.00	2	.5	.5	83.6
2960.00	2	.5	.5	84.2
3010.00	1	.3	.3	84.4
3390.00	2	.5	.5	84.9
3470.00	3	.8	.8	85.7
3500.00	1	.3	.3	86.0
3600.00	2	.5	.5	86.5
3680.00	4	1.0	1.0	87.5
3800.00	3	.8	.8	88.3
3840.00	1	.3	.3	88.6
3850.00	1	.3	.3	88.8
3860.00	1	.3	.3	89.1
3890.00	3	.8	.8	89.9
3900.00	2	.5	.5	90.4
3950.00	1	.3	.3	90.6
3980.00	2	.5	.5	91.2
4000.00	2	.5	.5	91.7
4050.00	1	.3	.3	91.9
4080.00	2	.5	.5	92.5
4100.00	10	2.6	2.6	95.1
4200.00	4	1.0	1.0	96.1
4300.00	4	1.0	1.0	97.1
4320.00	3	.8	.8	97.9
4350.00	1	.3	.3	98.2
4380.00	1	.3	.3	98.4
4390.00	1	.3	.3	98.7
4570.00	2	.5	.5	99.2
4670.00	1	.3	.3	99.5
5040.00	1	.3	.3	99.7
5300.00	1	.3	.3	100.0
Total	385	100.0	100.0	

INCOME

Mean 2473.403 Std dev 766.437

VACATION Is family vacation important?

Valid Cum

Value Label	Value	Frequency	Percent	Percent	Percent
not important at all	1.00	4	1.0	1.0	1.0
of little importance	2.00	4	1.0	1.0	2.1
important	3.00	91	23.6	23.6	25.7
very important	4.00	174	45.2	45.2	70.9
extremely important	5.00	112	29.1	29.1	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	4.003	Std dev	.815		

TRAVEL Is travelling important to you?

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1.00	9	2.3	2.3	2.3
of little importance	2.00	41	10.6	10.6	13.0
important	3.00	183	47.5	47.5	60.5
very important	4.00	76	19.7	19.7	80.3
extremely important	5.00	76	19.7	19.7	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.439	Std dev	.998		

FAMILY SIZE

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	1.00	25	6.5	6.5	6.5
	2.00	27	7.0	7.0	13.5
	3.00	81	21.0	21.0	34.5
	4.00	31	8.1	8.1	42.6
	5.00	42	10.9	10.9	53.5
	6.00	42	10.9	10.9	64.4
	7.00	52	13.5	13.5	77.9
	8.00	65	16.9	16.9	94.8
	9.00	20	5.2	5.2	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	5.122	Std dev	2.365		

AGE

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	24.00	3	.8	.8	.8
	29.00	15	3.9	3.9	4.7
	30.00	12	3.1	3.1	7.8
	31.00	27	7.0	7.0	14.8
	32.00	21	5.5	5.5	20.3
	33.00	36	9.4	9.4	29.6
	34.00	36	9.4	9.4	39.0
	35.00	4	1.0	1.0	40.0
	36.00	8	2.1	2.1	42.1

37.00	8	2.1	2.1	44.2
38.00	18	4.7	4.7	48.8
39.00	33	8.6	8.6	57.4
40.00	7	1.8	1.8	59.2
41.00	12	3.1	3.1	62.3
42.00	7	1.8	1.8	64.2
43.00	8	2.1	2.1	66.2
44.00	9	2.3	2.3	68.6
45.00	8	2.1	2.1	70.6
46.00	1	.3	.3	70.9
47.00	10	2.6	2.6	73.5
48.00	9	2.3	2.3	75.8
51.00	4	1.0	1.0	76.9
52.00	10	2.6	2.6	79.5
53.00	8	2.1	2.1	81.6
54.00	9	2.3	2.3	83.9
55.00	8	2.1	2.1	86.0
56.00	5	1.3	1.3	87.3
57.00	5	1.3	1.3	88.6
58.00	9	2.3	2.3	90.9
59.00	3	.8	.8	91.7
61.00	3	.8	.8	92.5
63.00	3	.8	.8	93.2
64.00	4	1.0	1.0	94.3
65.00	4	1.0	1.0	95.3
66.00	3	.8	.8	96.1
67.00	5	1.3	1.3	97.4
68.00	1	.3	.3	97.7
69.00	3	.8	.8	98.4
70.00	1	.3	.3	98.7
71.00	2	.5	.5	99.2
73.00	1	.3	.3	99.5
75.00	2	.5	.5	100.0
Total	385	100.0	100.0	

AGE

Mean

41.730

Std dev

11.157

Table 4

SUMMARY OF SURVEY RESULTS FOR THE UAE

V1 IMPORTANCE OF "travelling expenses"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	42	10.9	10.9	10.9
of little importance	2	88	22.9	22.9	33.8
important	3	73	19.0	19.0	52.7
very important	4	141	36.6	36.6	89.4
extremely important	5	41	10.6	10.6	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.132	Std dev	1.201		

V2 Importance of "tourist packages"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	49	12.7	12.7	12.7
of little importance	2	75	19.5	19.5	32.2
important	3	64	16.6	16.6	48.8
very important	4	116	30.1	30.1	79.0
extremely important	5	81	21.0	21.0	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.273	Std dev	1.333		

V3 Importance of "natural scenes"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	25	6.5	6.5	6.5
of little importance	2	81	21.0	21.0	27.5
important	3	95	24.7	24.7	52.2
very important	4	106	27.5	27.5	79.7
extremely important	5	78	20.3	20.3	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.340	Std dev	1.202		

V4 Importance of "unique features"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	36	9.4	9.4	9.4
of little importance	2	99	25.7	25.7	35.1

important	3	108	28.1	28.1	62.1
very important	4	103	26.8	26.8	89.9
extremely important	5	39	10.1	10.1	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	3.026	Std dev	1.143		

v5 Importance of "family attractions"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	24	6.2	6.2	6.2
of little importance	2	94	24.4	24.4	30.6
important	3	101	26.2	26.2	56.9
very important	4	119	30.9	30.9	87.8
extremely important	5	47	12.2	12.2	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	3.184	Std dev	1.123		

v6 Importance of "weather"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	26	6.8	6.8	6.8
of little importance	2	38	9.9	9.9	16.6
important	3	261	67.8	67.8	84.4
very important	4	48	12.5	12.5	96.9
extremely important	5	12	3.1	3.1	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	2.953	Std dev	.786		

v7 Importance of "cost of accommodation"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	89	23.1	23.1	23.1
of little importance	2	117	30.4	30.4	53.5
important	3	62	16.1	16.1	69.6
very important	4	14	3.6	3.6	73.2
extremely important	5	103	26.8	26.8	100.0
		-----	-----	-----	
Total		385	100.0	100.0	
Mean	2.805	Std dev	1.518		

v8 Importance of "cost of living at resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	24	6.2	6.2	6.2
of little importance	2	96	24.9	24.9	31.2
important	3	99	25.7	25.7	56.9
very important	4	123	31.9	31.9	88.8
extremely important	5	43	11.2	11.2	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.169	Std dev	1.113		

v9 Importance of "children attractions"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	30	7.8	7.8	7.8
of little importance	2	57	14.8	14.8	22.6
important	3	115	29.9	29.9	52.5
very important	4	47	12.2	12.2	64.7
extremely important	5	136	35.3	35.3	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.525	Std dev	1.313		

v10 Importance of "night entertainment"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	27	7.0	7.0	7.0
of little importance	2	81	21.0	21.0	28.1
important	3	75	19.5	19.5	47.5
very important	4	135	35.1	35.1	82.6
extremely important	5	67	17.4	17.4	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.348	Std dev	1.192		

v11 Importance of "knowlege of places to visit and see"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	42	10.9	10.9	10.9
of little importance	2	90	23.4	23.4	34.3
important	3	70	18.2	18.2	52.5
very important	4	136	35.3	35.3	87.8
extremely important	5	47	12.2	12.2	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.145	Std dev	1.222		

V12 Importance of "shopping bargains"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	52	13.5	13.5	13.5
of little importance	2	77	20.0	20.0	33.5
important	3	66	17.1	17.1	50.6
very important	4	121	31.4	31.4	82.1
extremely important	5	69	17.9	17.9	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.203	Std dev	1.317		

V13 Importance of "recommendations of relatives and friends"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	25	6.5	6.5	6.5
of little importance	2	77	20.0	20.0	26.5
important	3	109	28.3	28.3	54.8
very important	4	102	26.5	26.5	81.3
extremely important	5	72	18.7	18.7	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.309	Std dev	1.175		

V14 Importance of "prior information about the resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	37	9.6	9.6	9.6
important	3	99	25.7	25.7	35.3
very important	4	104	27.0	27.0	62.3
extremely important	5	145	37.7	37.7	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.927	Std dev	1.008		

V15 Importance of "communications with nationals"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	0	1	.3	.3	.3
of little importance	2	22	5.7	5.7	6.0
important	3	96	24.9	24.9	30.9
very important	4	97	25.2	25.2	56.1
extremely important	5	169	43.9	43.9	100.0
		-----	-----	-----	

		Total	385	100.0	100.0
Mean	4.068	Std dev	.982		

V16 Importance of "internal transport facilities and cost"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	20	5.2	5.2	5.2
of little importance	2	37	9.6	9.6	14.8
important	3	273	70.9	70.9	85.7
very important	4	43	11.2	11.2	96.9
extremely important	5	12	3.1	3.1	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	2.974	Std dev	.736		

V17 Importance of "service standards"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	81	21.0	21.0	21.0
of little importance	2	105	27.3	27.3	48.3
important	3	66	17.1	17.1	65.5
very important	4	43	11.2	11.2	76.6
extremely important	5	90	23.4	23.4	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	2.886	Std dev	1.468		

V18 Importance of "medical facilities at resort"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1	27	7.0	7.0	7.0
of little importance	2	98	25.5	25.5	32.5
important	3	94	24.4	24.4	56.9
very important	4	127	33.0	33.0	89.9
extremely important	5	39	10.1	10.1	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	3.138	Std dev	1.120		

V19 Importance of "adventures"

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
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of little importance	2	33	8.6	8.6	8.6
important	3	55	14.3	14.3	22.9
very important	4	120	31.2	31.2	54.0
extremely important	5	177	46.0	46.0	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	4.145	Std dev	.963		

V20 Memories to bring back home

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
of little importance	2	29	7.5	7.5	7.5
important	3	80	20.8	20.8	28.3
very important	4	74	19.2	19.2	47.5
extremely important	5	202	52.5	52.5	100.0
		-----	-----	-----	
	Total	385	100.0	100.0	
Mean	4.166	Std dev	1.004		

HOUSEHOLD INCOME

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	2450.00	1	.3	.3	.3
	2900.00	1	.3	.3	.5
	2975.00	1	.3	.3	.8
	3245.00	1	.3	.3	1.0
	3335.00	1	.3	.3	1.3
	3470.00	5	1.3	1.3	2.6
	3485.00	1	.3	.3	2.9
	3500.00	13	3.4	3.4	6.2
	3545.00	1	.3	.3	6.5
	3560.00	4	1.0	1.0	7.5
	3575.00	9	2.3	2.3	9.9
	3590.00	1	.3	.3	10.1
	3605.00	3	.8	.8	10.9
	3620.00	3	.8	.8	11.7
	3635.00	4	1.0	1.0	12.7
	3650.00	22	5.7	5.7	18.4
	3680.00	2	.5	.5	19.0
	3710.00	1	.3	.3	19.2
	3740.00	5	1.3	1.3	20.5
	3770.00	4	1.0	1.0	21.6
	3785.00	4	1.0	1.0	22.6
	3800.00	15	3.9	3.9	26.5
	3815.00	4	1.0	1.0	27.5
	3860.00	10	2.6	2.6	30.1
	3905.00	6	1.6	1.6	31.7
	3950.00	24	6.2	6.2	37.9
	3965.00	1	.3	.3	38.2
	3980.00	10	2.6	2.6	40.8
	4025.00	11	2.9	2.9	43.6
	4040.00	3	.8	.8	44.4
	4070.00	4	1.0	1.0	45.5
	4085.00	6	1.6	1.6	47.0

4130.00	2	.5	.5	47.5
4235.00	2	.5	.5	48.1
4400.00	6	1.6	1.6	49.6
4475.00	2	.5	.5	50.1
4505.00	2	.5	.5	50.6
4520.00	3	.8	.8	51.4
4550.00	9	2.3	2.3	53.8
4700.00	1	.3	.3	54.0
4715.00	2	.5	.5	54.5
4760.00	2	.5	.5	55.1
4775.00	4	1.0	1.0	56.1
4805.00	1	.3	.3	56.4
4850.00	7	1.8	1.8	58.2
4910.00	2	.5	.5	58.7
4940.00	2	.5	.5	59.2
5075.00	1	.3	.3	59.5
5096.00	2	.5	.5	60.0
5490.00	2	.5	.5	60.5
5525.00	1	.3	.3	60.8
5585.00	2	.5	.5	61.3
5750.00	3	.8	.8	62.1
5890.00	2	.5	.5	62.6
5900.00	2	.5	.5	63.1
5970.00	2	.5	.5	63.6
5998.00	2	.5	.5	64.2
6007.00	2	.5	.5	64.7
6020.00	3	.8	.8	65.5
6200.00	1	.3	.3	65.7
6275.00	2	.5	.5	66.2
6335.00	1	.3	.3	66.5
6350.00	3	.8	.8	67.3
6425.00	2	.5	.5	67.8
6515.00	1	.3	.3	68.1
6620.00	2	.5	.5	68.6
6650.00	6	1.6	1.6	70.1
6700.00	1	.3	.3	70.4
6710.00	3	.8	.8	71.2
6800.00	11	2.9	2.9	74.0
6950.00	9	2.3	2.3	76.4
6980.00	3	.8	.8	77.1
7025.00	1	.3	.3	77.4
7070.00	1	.3	.3	77.7
7085.00	1	.3	.3	77.9
7145.00	3	.8	.8	78.7
7200.00	2	.5	.5	79.2
7205.00	1	.3	.3	79.5
7235.00	1	.3	.3	79.7
7250.00	6	1.6	1.6	81.3
7355.00	2	.5	.5	81.8
7505.00	2	.5	.5	82.3
7625.00	1	.3	.3	82.6
7700.00	8	2.1	2.1	84.7
7760.00	1	.3	.3	84.9
7790.00	2	.5	.5	85.5
7805.00	3	.8	.8	86.2
7850.00	3	.8	.8	87.0
7970.00	1	.3	.3	87.3
8000.00	6	1.6	1.6	88.8
8060.00	3	.8	.8	89.6
8075.00	3	.8	.8	90.4
8135.00	2	.5	.5	90.9
8150.00	8	2.1	2.1	93.0
8300.00	2	.5	.5	93.5
8450.00	2	.5	.5	94.0
8525.00	1	.3	.3	94.3
8750.00	2	.5	.5	94.8
8900.00	4	1.0	1.0	95.8
9200.00	1	.3	.3	96.1
9275.00	3	.8	.8	96.9
9335.00	3	.8	.8	97.7
9350.00	6	1.6	1.6	99.2
10790.00	3	.8	.8	100.0

		Total	385	100.0	100.0
Mean	5341.187	Std dev	1870.548		

VACATION is family vacation important?

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1.00	14	3.6	3.6	3.6
of little importance	2.00	109	28.3	28.3	31.9
important	3.00	84	21.8	21.8	53.8
very important	4.00	82	21.3	21.3	75.1
extremely important	5.00	96	24.9	24.9	100.0
	Total	385	100.0	100.0	
Mean	3.356	Std dev	1.231		

TRAVEL is travelling important to you?

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
not important at all	1.00	17	4.4	4.4	4.4
of little importance	2.00	53	13.8	13.8	18.2
important	3.00	167	43.4	43.4	61.6
very important	4.00	42	10.9	10.9	72.5
extremely important	5.00	106	27.5	27.5	100.0
	Total	385	100.0	100.0	
Mean	3.434	Std dev	1.158		

FAMILY SIZE

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	1.00	29	7.5	7.5	7.5
	2.00	60	15.6	15.6	23.1
	3.00	110	28.6	28.6	51.7
	4.00	41	10.6	10.6	62.3
	5.00	43	11.2	11.2	73.5
	6.00	30	7.8	7.8	81.3
	7.00	31	8.1	8.1	89.4
	8.00	37	9.6	9.6	99.0
	9.00	4	1.0	1.0	100.0
	Total	385	100.0	100.0	
Mean	4.122	Std dev	2.128		

Value Label	Value	Frequency	Percent	Valid Percent	Cum Percent
	28.00	4	1.0	1.0	1.0
	29.00	16	4.2	4.2	5.2
	30.00	14	3.6	3.6	8.8
	31.00	30	7.8	7.8	16.6
	32.00	20	5.2	5.2	21.8
	33.00	12	3.1	3.1	24.9
	34.00	15	3.9	3.9	28.8
	36.00	10	2.6	2.6	31.4
	37.00	3	.8	.8	32.2
	38.00	19	4.9	4.9	37.1
	39.00	35	9.1	9.1	46.2
	40.00	4	1.0	1.0	47.3
	41.00	4	1.0	1.0	48.3
	42.00	12	3.1	3.1	51.4
	43.00	7	1.8	1.8	53.2
	44.00	12	3.1	3.1	56.4
	45.00	15	3.9	3.9	60.3
	46.00	9	2.3	2.3	62.6
	47.00	9	2.3	2.3	64.9
	48.00	18	4.7	4.7	69.6
	49.00	5	1.3	1.3	70.9
	50.00	4	1.0	1.0	71.9
	51.00	25	6.5	6.5	78.4
	52.00	16	4.2	4.2	82.6
	53.00	9	2.3	2.3	84.9
	54.00	14	3.6	3.6	88.6
	55.00	10	2.6	2.6	91.2
	56.00	7	1.8	1.8	93.0
	57.00	5	1.3	1.3	94.3
	58.00	7	1.8	1.8	96.1
	59.00	3	.8	.8	96.9
	61.00	2	.5	.5	97.4
	63.00	1	.3	.3	97.7
	64.00	3	.8	.8	98.4
	65.00	1	.3	.3	98.7
	66.00	1	.3	.3	99.0
	67.00	1	.3	.3	99.2
	69.00	1	.3	.3	99.5
	71.00	2	.5	.5	100.0
	Total	385	100.0	100.0	
Mean	42.712	Std dev	9.680		

APPENDIX 2.
QUESTIONNAIRE USED IN THE STUDY

جامعة وولنجونغ باستراليا
قسم التسويق

**University of Wollongong
(Australia)**

Department of Marketing

استبيان
خاص بدراسة طلب دول مجلس التعاون الخليجي على السياحة

A Questionnaire On The GCC Demand For Tourism

By

صاحب الاستبيان

Abdulla M. Alhemoud

عبدالله محمد عبدالله الحمود

This questionnaire aims at determining The main variables which affect the GCC citizens' decision to select a Particular tourist resort and finding Out whether these citizens will be Interested to visit Australia as a tourist Destination.

يهدف هذا الاستبيان الى الوقوف على اداء مواطن دول مجلس التعاون الخليجي بخصوص اختيار اماكن السياحة وما اذا كان هؤلاء المواطنين لديهم ميول لزيارة استراليا كمنطقة سياحية

This questionnaire is divided into four Sections. Section one is concerned with The relevant variables affecting the Consumers' decision to select a particular Tourist resort. Section two concentrates On the demand for Australian tourist Resorts. Section three collects some Demographic information about the Respondents. Section four is concerned with the tourist resorts visited by GCC consumers in 1998.

وينقسم الاستبيان الى ثلاثة اجزاء يتعلق الجزء الاول منه باهم المتغيرات المؤثرة في قراءات مواطن دول مجلس التعاون بينما يتناول الجزء الثانى الطلب على السياحة باستراليا ويختص الجزء الثالث بالخصائص الديمغرافية للمالى الاستبيان

القسم الرابع يتحدث عن زائرى دول مجلس التعاون للمناطق السياحية عام ١٩٩٨

This questionnaire is designed in a way That will ensure complete confidentiality.

يتميز هذا الاستبيان بسرية تامة حيث لا يمكن الاستدلال على هوية من شارك في ملئه .

Section One

القسم الاول .

Main variables which determine the decision to select a particular tourist resort.

اهم المتغيرات التي تؤثر في قرار مواطن دول مجلس التعاون الخليجي عند اختيار مكان سياحي معين

How important are the following variables when selecting a particular resort destination?

١- الى اي حد تعتبر العوامل المذكورة ادناه هامة عند اختيار مكان سياحي معين ؟

Please insert a check mark [] in the relevant box.

رجاء وضع علامة صح في الخانة المناسبة :

Code	العوامل Variables	غير هام على الاطلاق Not Important At All. (1)	قليل الاهمية Of Little Importance (2)	هام Important (3)	هام جدا Very Important (4)	هام للغاية Extremely Important (5)
V1	تكاليف السفر Cost of Traveling	1 []	2 []	3 []	4 []	5 []
V2	وجود صفقات سياحية Existence of Tourist Packages	1 []	2 []	3 []	4 []	5 []
V3	المناظر الطبيعية في الاماكن السياحية Natural Scenes at Resort	1 []	2 []	3 []	4 []	5 []

Code	العوامل Variables	غير هام على الإطلاق Not Important At All. (1)	قليل الاهمية Of Little Importance (2)	هام Important (3)	هام جدا Very Important (4)	هام للغاية Extremely Important (5)
	الخصائص الفريدة في المكان السياحي Unique Features of the Resort.	1 []	2 []	3 []	4 []	5 []
V4						
	جاذبيات الاسرة Family Attractions	١ []	٢ []	٥ []	٤ []	٣ []
V5						
	الطقس Weather	١ []	٢ []	٥ []	٤ []	٣ []
V6						
	تكلفة السكن Cost of Accommodation	1 []	2 []	3 []	4 []	5 []
V7						
	تكلفة المعيشة Cost of Living	١ []	٢ []	٥ []	٤ []	٣ []
V8						
	جاذبيات الاطفال Children Attractions	1 []	2 []	3 []	4 []	5 []
V9						

Code	العوامل Variables	غير هام على الاطلاق Not Important At All. (1)	قليل الاهمية Of Little Importance (2)	هام Important (3)	هام جدا Very Important (4)	هام للغاية Extremely Important (5)
V10	التسلية بالمساء Night Entertainment	١ []	٢ []	٥ []	٤ []	٣ []
V11	المعلومات المسبقة عن الاماكن التي يجب زيارتها في المنطقة السياحية Knowledge of Places to Visit & See	1 []	2 []	3 []	4 []	5 []
V12	الصفقات التسويقية Shopping Bargains	١ []	٢ []	٥ []	٤ []	٣ []
V13	توصيات الاقارب والاصدقاء Recommendations Of Relatives and Friends	1 []	2 []	3 []	4 []	5 []
V14	المعلومات المسبقة عن المنطقة السياحية Prior Information About the Resort	1 []	2 []	3 []	4 []	5 []

Code	العوامل Variables	غير هام على الإطلاق Not Important At All. (1)	قليل الاهمية Of Little Importance (2)	هام Important (3)	هام جدا Very Important (4)	هام للغاية Extremely Important (5)
V15	سهولة الاتصال بسكان المنطقة السياحية Communications With Nationals At the Resort	1 []	2 []	3 []	4 []	5 []
V16	توافر المواصلات الداخلية وتكلفتها بمكان السياحة Internal Transport Facilities & Cost	1 []	2 []	3 []	4 []	5 []
V17	مستوى الخدمات Service Standards	١ []	٢ []	٥ []	٤ []	٣ []
V18	توافر الخدمات الطبية في مكان السياحة Medical Facilities At the Resort	1 []	2 []	3 []	4 []	5 []
V19	المخاطر التي يمكن القيام بها Adventures	١ []	٢ []	٥ []	٤ []	٣ []
V20	الذكريات التي تحملها عند العودة Memories to Bring Back Home	1 []	2 []	3 []	4 []	5 []

2) How Important is Travelling to you and your Family?

٢- هل يعتبر السفر هام بالنسبة لك ولاسرتك ؟

- 1) [] Not Important at all.
غير هام على الاطلاق
- 2) [] Of Little Importance
قليل الاهمية
- 3) [] Important
هام
- 4) [] Very Important
هام جدا
- 5) [] Extremely Important
هام للغاية

3) How Important is a Family Vacation to you?

٣- هل تعتبر اجازة الاسرة بالغة الاهمية ؟

- 1) [] Not Important at all.
غير هام على الاطلاق
- 2) [] Of Little Importance
قليل الاهمية
- 3) [] Important
هام
- 4) [] Very Important
هام جدا
- 5) [] Extremely Important
هام للغاية

Section Two

القسم الثاني

Selecting Australia as a Tourist Resort

اختيار استراليا كم منطقة سياحية

Would you be interested in visiting Australia as a tourist resort/destination?

هل ترغب في زيارة استراليا كم منطقة سياحية

1) [] No
لا

2) [] Yes
نعم

If the answer to the above question is (NO), what are the main reasons for this?

إذا كانت الاجابة على السؤال اعلاه لا فما هي اهم الاسباب التي تمنعك من زيارة استراليا ؟

Code

V21 [] Distance
بعد المسافة

V22 [] Cost of travelling
تكلفة السفر

V23 [] Not Much is Known about Australia.
عدم وجود اى معلومات عن استراليا

V24 [] Other Close by destinations should be Visited First.
هناك اماكن اقرب من استراليا نحتاج للزيارة اولا

Code

V25 [] We do not know anyone who visited Australia.
لا نعرف احد سبق وزار استراليا

V26 [] The Weather in Australia during the Vacation is not very suitable
طقس استراليا وقت العطلات غير مناسب

V27

[] Australia is a big Country which is
Hard to see in one visit.

استراليا قارة كبيرة يصعب التعرف على اماكنها السياحية في زيارة واحدة

V28

[] Australia was never recommended by
Relatives or friends.

لم يسبق اوصى احد من الاقارب او الاصدقاء بزيارة استراليا

V29

[] Australia is somewhat isolated.

استراليا دولة منعزلة لحد ما

V30

[] The Gulf Community in Australia is
Very small, and very few Gulf tourists
Visit Australia yearly.

لا توجد جمالية خليجية كبيرة تعيش في استراليا او تزورها سنويا

Section Three

القسم الثالث

Some Demographic Variables

بعض العوامل الديمغرافية

Code

Sex	[] Female انثى	[] Male ذكر	Sex الجنس
Age	(.....) Years سنة		Age العمر
Fsiz	(.....) Individual فرد		Family Size عدد افراد الاسرة
Income	(\$.....) دولار		Monthly Household Income \$US دخل الاسرة الشهرى

SECTION FOUR

القسم الرابع

Tourist Resorts Visited By GCC Consumers in 1998

المناطق السياحية التي زارها سواح مجلس التعاون عام ١٩٩٨

1) Did you visit any resort in 1998?

هل زرت أي مقر سياحي في عام ١٩٩٨؟

Yes ____ نعم

No ____ لا

If your answer to the above question is “yes”, which country did you visit?

إذا كانت الاجابة على السؤال السابق نعم أي بلد قمتم بزيارته؟

2) How long did you stay? ما هي مدة الإقامة في بلد الزيارة ؟

Less than a week _____ أقل من اسبوع

One-Two weeks _____ اسبوع - اسبوعين

Two-Four weeks _____ اسبوعين - اربعة اسابيع

Four-Six weeks _____ اربعة اسابيع - ستة اسابيع

Two-Three Months _____ شهرين - ثلاثة شهور

Over three Months _____ أكثر من ثلاثة شهور

3) How do you rate the tourist resort, which you have visited in terms of the following attributes?

كيف تقيم مقر السياحة الذي زرتة طبقا للخصائص الآتية ؟

I. Travelling Costs: تكاليف السفر

- ___ 1. Extremely low منخفضة للغاية
- ___ 2. Very Low منخفضة جدا
- ___ 3. Low منخفضة
- ___ 4. Average متوسطة
- ___ 5. High مرتفعة
- ___ 6. Very high مرتفعة جدا
- ___ 7. Extremely high مرتفعة للغاية

II. Living Expenses تكاليف المعيشة

- ___ 1. Extremely low منخفضة للغاية
- ___ 2. Very Low منخفضة جدا
- ___ 3. Low منخفضة
- ___ 4. Average متوسطة
- ___ 5. High مرتفعة
- ___ 6. Very high مرتفعة جدا
- ___ 7. Extremely high مرتفعة للغاية

III. Degree of Comfort درجة الراحة

- ___1. Extremely comfortable مريح للغاية
- ___2. Very comfortable مريح جدا
- ___3. Comfortable مريح
- ___4. Neither comfortable nor uncomfortable متوسط من الراحة
- ___5. Uncomfortable غير مريح
- ___6. Very uncomfortable غير مريح جدا
- ___7. Extremely uncomfortable غير مريح للغاية

IV. Endowment with Attractions and Adventures

نواجه امّا كن اجتذاب المخاطرة

- ___1. Extremely rich غنى للغاية
- ___2. Very rich غنى جدا
- ___3. Rich غنى
- ___4. Neither rich nor poor ليس غنى او فقير
- ___5. Poor فقير
- ___6. Very poor فقير جدا
- ___7. Extremely poor فقير للغاية

V. Entertainment. التسلية

- ___1. Extremely entertaining ملى للغاية
- ___2. Very entertaining ملى جدا
- ___3. Entertaining ملى
- ___4. Neither entertaining nor dull متوسط التسلية
- ___5. Dull غير ملى
- ___6. Very dull غير ملى جدا
- ___7. Extremely dull غير ملى للغاية