Tourism, travel risk and travel risk perceptions: a study of travel risk perceptions and the effects of incidents on tourism

Yeganeh Morakabati

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List of abbreviations

CDPA	Camp David Peace Agreement
EC	European Commission
ETA	Statistical Package for Social Science
GDP	Gross Domestic Product
IAST	International Academy for the Study of Tourism
KTB	Kenya's Tourism Board
OECD	Organisation for Economic Co-operation and Development
PCA	Principal Factor Analysis
SEG	Socio Economic Groupings
SPSS	Statistical Package for Social Science
TIA	Travel Industry Association of America
UA	Uncertainty Avoidance
UK	United Kingdom
UN	United Nations
UNWTO	World Tourism Organisation
US	United States
USA	United States of America

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Abstract

When major incidents occur, whether in the form of natural disasters (for example, Tsunamis, hurricanes) or man-made incidents (such as acts of terrorism or war), there is an impact on travel flows and patterns. These impacts can be in the form of the volume of tourists that flow to a particular area, the characteristics of those tourists and/or the expenditure they make whilst there. The time required for destinations to recover from such incidents and the loss of tourism receipts depends upon a variety of factors such as the nature of the incident, the response of the destination to the incident and the impact that such events have on the travel risk perceptions of tourists.

The purpose of this research is to examine the nature, magnitude and direct impacts of a selection of incidents and the time recovery period. Case studies of high profile events such as those that occurred in Egypt, Indonesia, Kenya, Spain, the UK and the USA have been selected because of the relative importance of the events and, to include a broad range of destination types.

The incidents that have occurred will be examined through secondary data drawing heavily on related journal articles and the analyses of data that are published by the UNWTO, the World Bank and the relevant national governments. The literature analyses will look at the research that academics have undertaken when looking at specific incidents that occurred in the case study areas and in terms of their effects on tourism in general and to the areas involved. Data from published statistics will be used to examine tourist arrival trends prior to the incidents, immediately following the incidents and the time period needed for the level of tourism activity to be restored to where it was likely to have been if the incident had not happened. Although the incidents are examined as individual case studies the analyses will also take a chronological approach to examine whether the impacts of major incidents diminishes with exposure to such events. That is, did the earlier terrorist attacks have a greater impact because of their novelty and therefore enhanced shock effect compared with later events even though the latter may have been of greater magnitude?

The secondary analyses will also examine aspects such as whether there is a difference in impact if the incidents are specifically targeted at tourists in general rather than tourists of a particular nationality.

Whenever events occur they may influence the perception of travellers in terms of the potential risks they face. Therefore, the thesis will move on to look at travel-related risks and how they may impact on the travel decisions of tourists, particularly non-business or discretionary tourists. There is a variety of risks that may influence the travel decisions of tourists including those relating to physical harm, financial loss and also the risk of dissatisfaction from their travel experience. The different types of risks that may influence travel decisions will be examined together with demographic characteristics of the travellers in order to explore whether there are differences in risk averseness between travellers from different countries of origin, age groups, gender, education and occupation. This aspect of the analysis will be driven by primary data analysis in the form of a questionnaire (physical and on-line) that uses both quantitative and qualitative instruments to determine travellers' travel-related risk perceptions and identify regions and countries that are felt to be high risk destinations by type of risk.

The perceived risks will also be compared with actual risks as identified by insurance company claims data. Although limited in scope, this aspect of analysis will seek to identify whether travel-related risk perceptions mirror actual risks or whether they are driven by other factors such as media coverage of events.

Using the man-made risks as the identifier, the regional aspects of travel-related risk will then be focused to one region of the planet in particular. This region is the Middle East plus some selected countries that share the same issues in relation to tourism development. Countries in this area have been beset by man-made incidents that have deterred the development of tourism in spite of the attractiveness of the region in terms of climate, heritage and culture. A comparative analysis is undertaken to look for commonalities and factors that explain the lack of tourism development in some countries.

Using the findings from the secondary and primary data analyses the potential future of the region in general and Iran in particular will be examined using the Delphi technique by drawing upon the collective wisdom of some experts in tourism who have an understanding of tourism development in difficult political areas.

Finally the research will attempt to pull all of these strands together to see if there are any identifiable guidelines that may help our understanding of travel related risks and whether there are any lessons that can be learned to inform the policy makers in troubled areas.

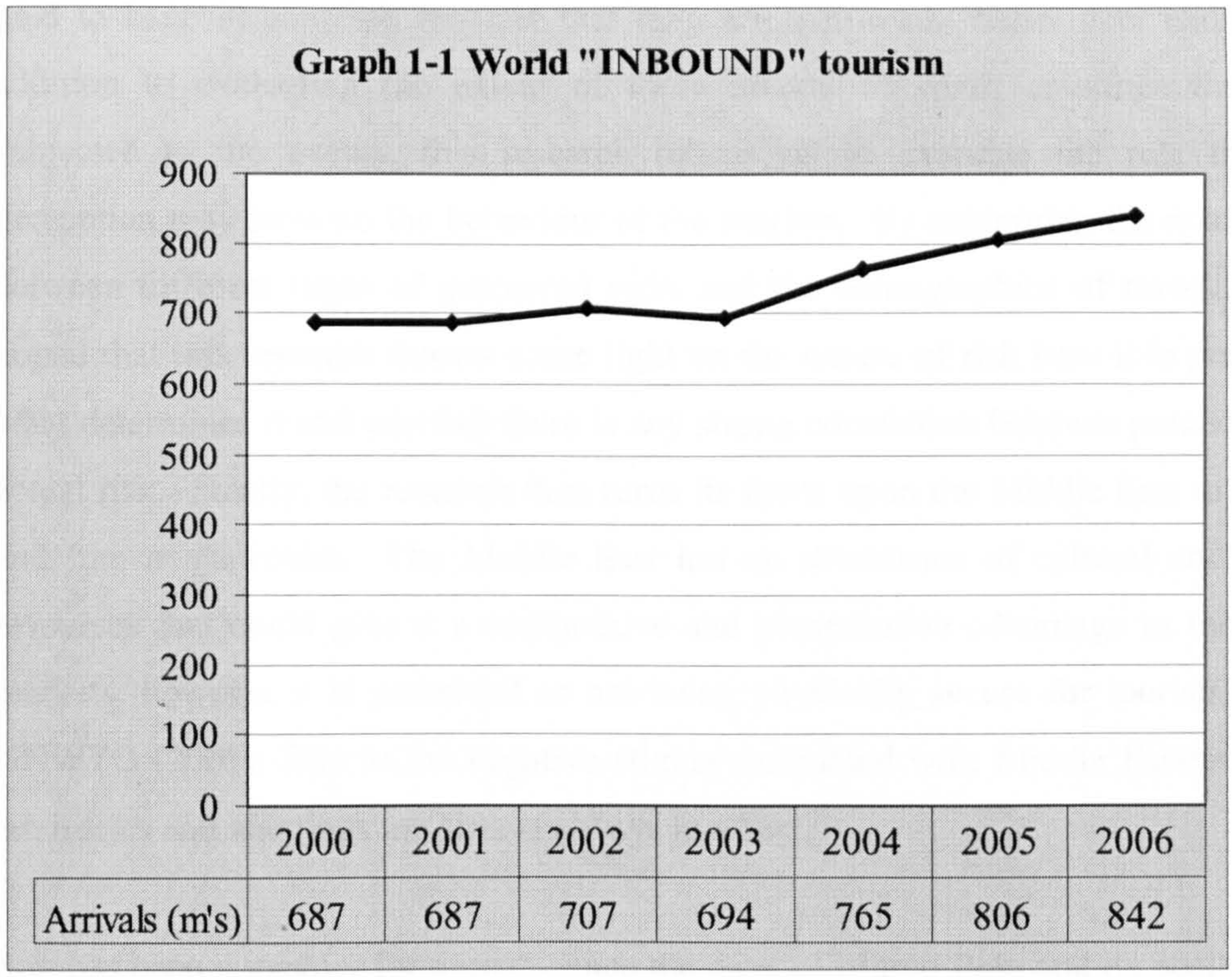
Chapter one

Introduction

Introduction

The desire of people to experience different places is not new, but today's tourism has seen this desire grow to unprecedented levels (Kanso, 2005). Travel was once limited to only the prosperous, but has now become commonplace for hundreds of millions of people. There are many factors that could be cited as being responsible for this strong growth in tourism and they tend to fall into one or more of the following categories; economic factors; political factors and technological factors. There are also factors, particularly economic and political, that are working against this strong growth in tourism activity. More recently, some of the negative factors, such as natural disasters, disease and acts of terrorism, have managed to capture global headline status and cause the growth in tourism activity to stutter. Such negative factors not only interrupt the flow of tourists in the short run, they can also bring with them far-reaching impacts on the future development of tourism in a country. Although it seems that potential tourists may have a relatively short-lived memory, the implications for investment in the industry may be a different matter. As has been documented in a number of cases (e.g. Rome and Vienna in 1985) terrorism is a real obstacle to tourism expansion (Wahab, 1996); terrorism not only reduces tourism activity but also relocates tourism and has an impact on long-term investment in tourism (Wall, 1996).

These factors that work against the flow and growth of tourism include terrorism, natural disasters, health scares, oil price rises, exchange rate fluctuations and economic and political uncertainties WT0 (2006). In spite of the obstruction of various negative events in recent years the number of travellers crossing national boundaries increased from a mere 23 million in 1950 to 842 million in 2006, corresponding to an average annual growth rate of 7 % (UNWTO, 2007). Much of this growth can be attributed to the development of transportation and communications.



Source: adapted from UNWTO (2007)

Once one turns attention away from global tourism trends and instead looks at regional and country trends, issues regarding aspects such as safety and security can be seen to have seriously curtailed tourism development in some areas/countries. Indeed, discretionary or leisure tourism can be highly affected by security issues, and the tourist's behaviour and destination choices are significantly determined by the tourist's perceptions of security, risk and safety (Edgel, 1990; Hall 1994; Pizam and Mansfield 1996; Wahab et al. 1996; Clements and Georgiou 1998; Sonmez and Graefe 1998; Sonmez et al. 1999; Ioannides and Aposopolos 1999; Poon and Adams 2000; Cooper, 2001; Hall, Timothy and Duval 2003; Aktas et al. in Theohold 2005). Risk, real or perceived leads to changes in the level of anxiety and uncertainty in the mind of a would-be traveller with respect to particular destinations (Douglas and Mills 2006). More importantly, from studying risk and travel, some authors have found differences in the perception of risk among tourists (Douglas and Mills 2006). Furthermore, it seems that some travellers tend to be more risk averse than others.

The primary purpose of this research is multifaceted. It is to examine the effects of extraordinary events on tourism flows around the world. These events are varied but

tend to have in common the fact that they are man-made rather than natural. In addition to evaluating the extent of these effects on those countries that were subjected to the events, this research moves on to examine the role that risk perception may have on the behaviour of the tourists. By examining the relationship between different types of perceived risks and the demographics of travellers it is hoped that this research throws some light on the nature of risk how it is perceived, what determines it and whether there is any strong correlation between perceived and actual risk. Finally, the research then turns its focus upon the Middle East in general and Iran in particular. The Middle East has an abundance of cultural and natural resources that could give it a competitive and comparative advantage in the tourist markets, however it is perceived as not being physically secure for tourists to visit UNWTO (2001). Due to the negative stigma associated with Middle Eastern travel, advisories and warnings are almost always in effect.

Iran has been a magnet for tourists since the days of Marco Polo and its position as a land bridge between Asia Minor and Asia proper have made it an essential point of transit or sojourn for thousands of world travellers every year. The country's natural beauty, rich culture and diverse climate can give the destination wide appeal. However, the political environment has obscured the significance of tourism in the country. Following the political change in 1979, there has been a drastic shift in tourist demand away from Iran and in favour of its competitors. Experts believe that while Iran has some of the world's most important tourist attractions listed by UNESCO, pilgrimage sites, coastal areas, mountains, deserts and rivers, these impressive resources have remained untapped due to the state's lack of attention to the tourism industry.

1.1 The rational for research

The main driving force for choosing this topic of enquiry is the observation that the Middle East has so much to offer tourism in terms of heritage and culture, not to mention climate and leisure facilities, but has failed to attract the absolute growth in tourism enjoyed by other regions of the world. Once this area of research came to mind it was hard to ignore the negative aspects associated with traveling to the region that must deter visitors from outside the region. This led the researcher to examine the ways that serious events, such as bombings and shootings have affected the flow

of tourism activity in different areas of the world. Could differences in impact be explained and how long did it take different countries to recover from the effects of the incidents?. This leads the research into the area of what influences people when they are making their travel decisions. If it really is a concern for physical safety that deters people from traveling to, say, the Middle East, then how are these risks perceived and is there any way to explain the affects of these travel risk perceptions by analyzing the responses of travelers?

It is hoped that this research will help draw out a set of guiding principles that will help people understand the various relationships tested throughout the literature review and analyses of this thesis. Such insight and principles could then be used in the planning and policy processes of countries or regions affected by these serious incidents.

1.2 The Research aim

To investigate travel risk perceptions and the effects of incidents on tourism.

1.3 The Research objectives

The main objectives of this research are:

- To examine the literature with respect to travel risk;
- To determine the effects of major incidents on travel to specific destinations;
- To explore the differences in recovery time and to attribute such differences to factors such as the nature of the incidents or the marketing response of destinations;
- To evaluate the work that has been done in determining risk perceptions;
- To study the travel risk perceptions of travellers from different backgrounds;
- To examine the differences between the perceived risks and actual risks of specific destinations;

- To explore the effects of perceived travel risk on future travel (using Delphi Technique)

1.4 Research Hypotheses

1. That major incidents such as natural and man-made disasters affect tourism activities differently according to the level of tourism development in the affected destination;
2. That travel related risk perceptions are influenced by the demographics of the traveller;
3. That the previous experience of tourists is more important in determining travel related risk perceptions than any other factor;
4. That travel-related risks are a major determinant of the travel decisions made by tourists;
5. That travel related risk associated with political unrest is more significant than any other form of travel related risks as a driver of travel decisions;
6. That there are significant differences between the different regions of the world and the perceived travel-related risks;
7. That travel related risk perceptions are highly correlated with actual travel related risks;
8. That the Middle East region's tourism development has suffered because of the perceived level of travel-related risk;
9. That it is the travel-related risk perception of Iran that hinders the development of tourism activities in that country.

Using hybrid methods will help create the platform to examine and resolve the aims and objectives of this thesis. The quantitative methods will be based on a questionnaire survey and the qualitative research will involve the Delphi technique using globally acclaimed experts in the field of tourism.

Thesis structure

Chapter 1 provides the background to the research topic under investigation, giving an insight into tourism growth and negative events and travel related risk, the rationale for the research, and identifies the aim and objectives.

Chapter 2 presents a through review of the body of knowledge related to the research topic. It introduces the concept of the tourism system and its key components, the relationship between tourism and political stability, in the light of political violence, terrorism and war on tourist behaviour and the tourism industry.

Chapter 3 explores the impact of terrorism attacks in terms of revenue, arrivals and the recovery periods on three selected case of study in developing countries namely Egypt, Indonesia and Kenya.

Chapter 4 examines the impact of terrorism in developed countries in terms of arrivals and the expenditure of tourists and contrasts the recovery period and impact with the impact in developing countries that was examined in chapter 3. The selected cases are the USA 9/11 attacks, Madrid bombings and suicide attack in UK (London Transport System).

Part two

Chapter 5 The purpose of this chapter is firstly to look at the current literature about tourism in Middle East in general and Iran in particular. The chapter addresses pressing issues and impacts of political impediments that may be responsible for the relatively poor development of tourism in the region and in Iran.

Chapter 6 The purpose of this chapter is to explore the concept of risk, as it applies to tourists when making decisions with respect to travel and to explore how perceptions of risk may impact on the travel decisions of tourists, particularly for the non-business or discretionary tourists.

Part three

Chapter 7 presents the research methodology underpinning the thesis and outlines the chosen research method, the primary and the secondary data collection techniques along with the reasons behind their use.

Chapter 8 This chapter examines the questionnaire survey, and explains the various methods that have been chosen to analyse the data in greater detail and the outcome of that research.

Chapter 9 presents the results of the Delphi Exercise and analyses the results in the context of the questionnaire survey results and the indications provided by the literature analyses.

Chapter 10 Conclusion, discusses the key study findings, through the literature review and the primary research. It also qualifies the research that has been undertaken by explaining the limitations of the study. Finally, the thesis ends with recommendations and suggestions for further research avenues.

Chapter 2
Literature review

Introduction

This chapter introduces the concept of the tourism system and its key components, the relationship between tourism and political stability, in the light of political violence, terrorism and war, on tourists' behaviour and that of the tourism industry. It also looks at the place of risk, largely that arising from political violence and/or terrorism within the tourism system and how this affects the operation of the tourism system in host destinations.

A recurring theme within tourism and security literature is that a successful tourism industry requires political stability. Tourism analysts seem to share the view that international visitors are aware of and concerned about issues that influence their personal safety (Poon and Adams 2000; Edgel 1990) and that tourism only can thrive under peaceful conditions (Pizam and Mansfield 1996).

Political instability is endemic in much of the developing world. Insufficiency, shortages, remnants of colonialism and proxy wars of the superpowers set the stage for random violence, ethnic conflict, revolution and acts such as hostage taking. At the same time, the antiquities, culture, flora and fauna associated with the less industrialized societies make tourism a seemingly attractive option in nations with all too few alternatives (Ritcher, 1989 in Harrison 1992).

Sun, sand, sea and sex, the four s's, are often seen as the core of a developing nation's appeal (Cick, 1989, in Harrison, 1992, p 308). A fifth is even more critical: security. Tourism as a discretionary activity is incredibly vulnerable to political stability. Even major natural disasters, such as earthquakes or hurricanes, do not have the lasting and devastating impact associated with political unrest, with subsequent media coverage visitor numbers and expenditure can fall drastically (Smyth 1986). Considering that within the *purchase-on-faith* world of tourism perception is reality, the implications of any security/safety issue can prove disastrous to a destination (Santana 2001).

Depending on the source of political stability, a developed nation may be able to exercise effective damage control or contain the political upheaval so that tourists are out of harm and relatively unaware of problems. The developing nation has far fewer

resources with which to cope perhaps because of the lack of economic diversity often found in non-industrialised countries. In such circumstances, tourism is not one among many industries, but often the chief or leading industry. Secondly, developing countries rarely have a domestic base for tourism with which to cushion seasonality or to absorb some spare tourism capacity when international tourism falters (this aspect will be examined in the case of Indonesia and Egypt, chapter 3). Thirdly, if or when political instability occurs, the developing nation's ability to cope is far less (Harrison, 1992).

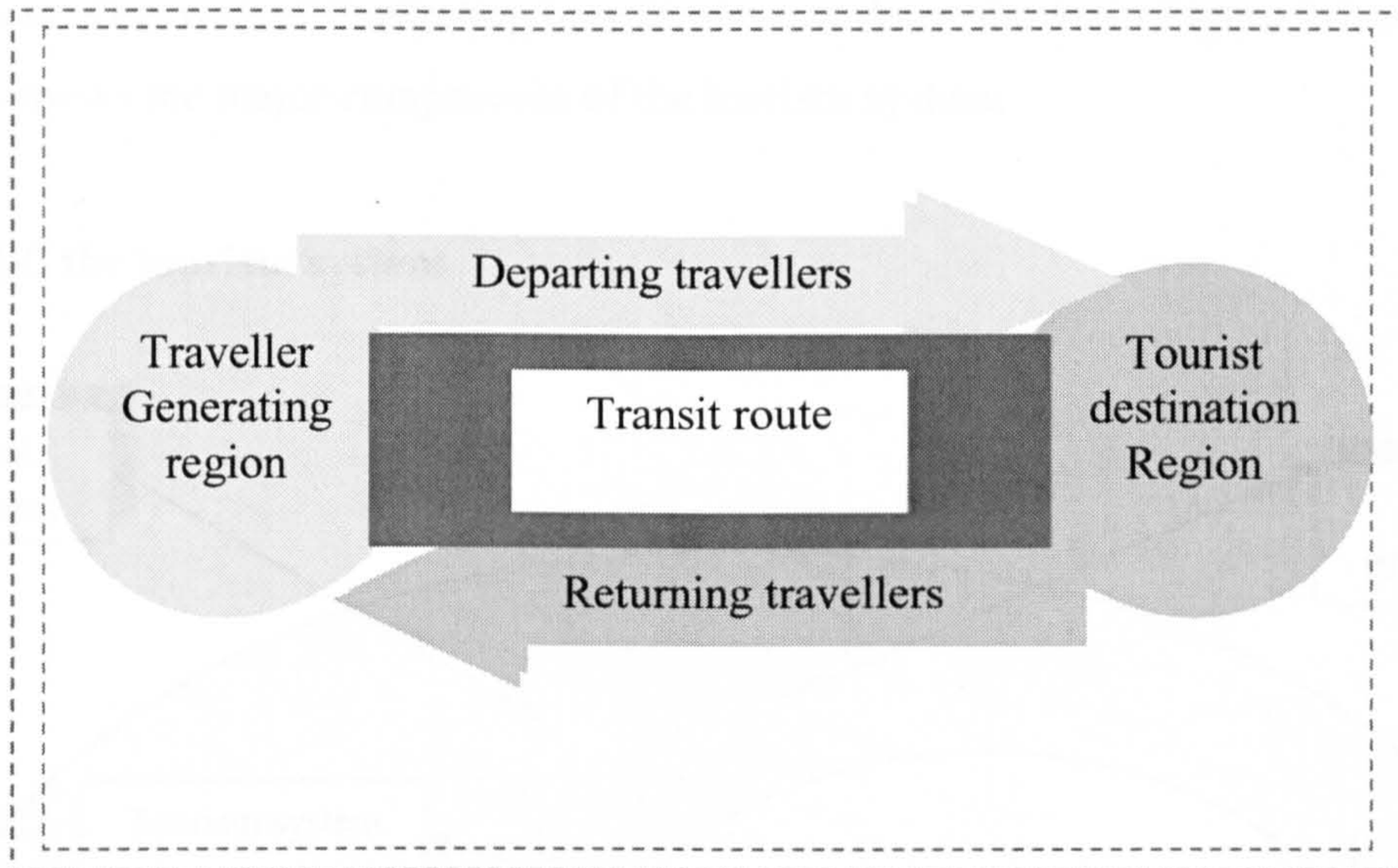
2.1 Tourism system and development

A system can be defined as a group of consistent, interdependent and interacting essentials that together form a single purposeful structure. Among other characteristics systems tend to be hierarchical, in that they consist of subsystems and are themselves part of a larger structure (Oppermann et al.2000). Leiper (1995) has defined the tourism system (see figure 2-1) with five interdependent core elements as follows:

- At least one tourist
- At least one –tourist-generating region
- At least one transit routes region
- A travel and tourism industry

The traveller–generating region represents the generating market for tourism and, in a sense, provides the *push* to stimulate and motivate travel. The *pull* factors, on the other hand, energise the whole tourism system and, in this way, create demand for travel within the generating region.

Figure 2-1 a basic tourism system

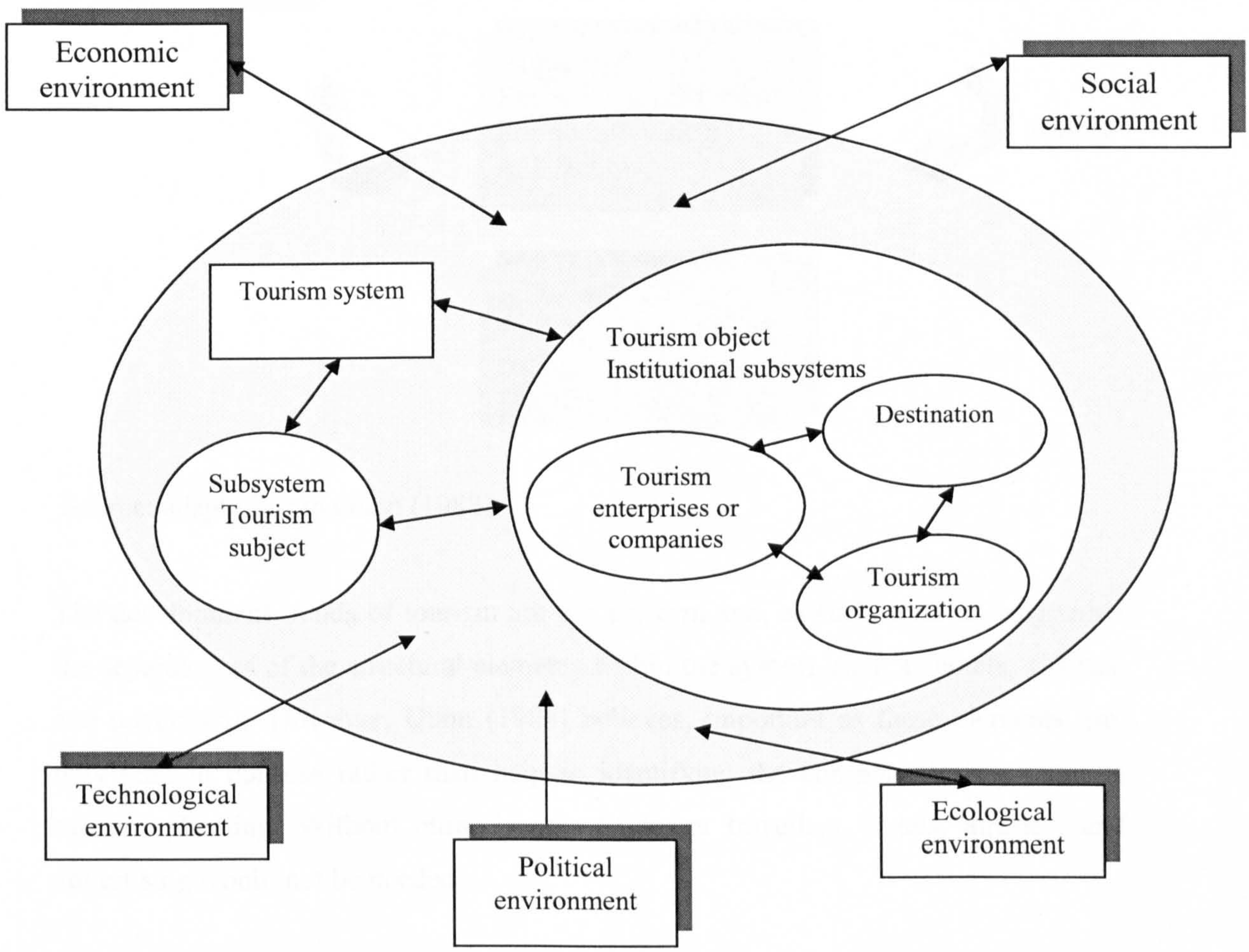


Source: adapted from Leiper, 1990 in cooper et al.(2003)

Additionally, there are many environmental and external systems (socio- cultural, economic, political, physical, and so on) in which the tourism system is entrenched (see Figure 2-1). The dynamics or energies of the system are reflected in the passage of a tourist from their normal place of residence to a destination, via a transit region. The dependencies and interdependencies are also paramount. The tourism system can be seen to be supported by a variety of external systems, including the oil industry (providing fuel for the transportation), agriculture (supplying food to restaurants) and the government (formally managing the access process to the destination country). These external factors can have a significant effect on the formation of a tourism system. For example destruction of an island airport by a hurricane or earthquake can hinder the establishment of a tourism system on the island albeit temporarily. The dynamic effects are not one way, tourism systems can also influence the external environments where, for example, tourism may be used to stimulate a destination's economy, or to open the way for the improvement of diplomatic relations between countries.

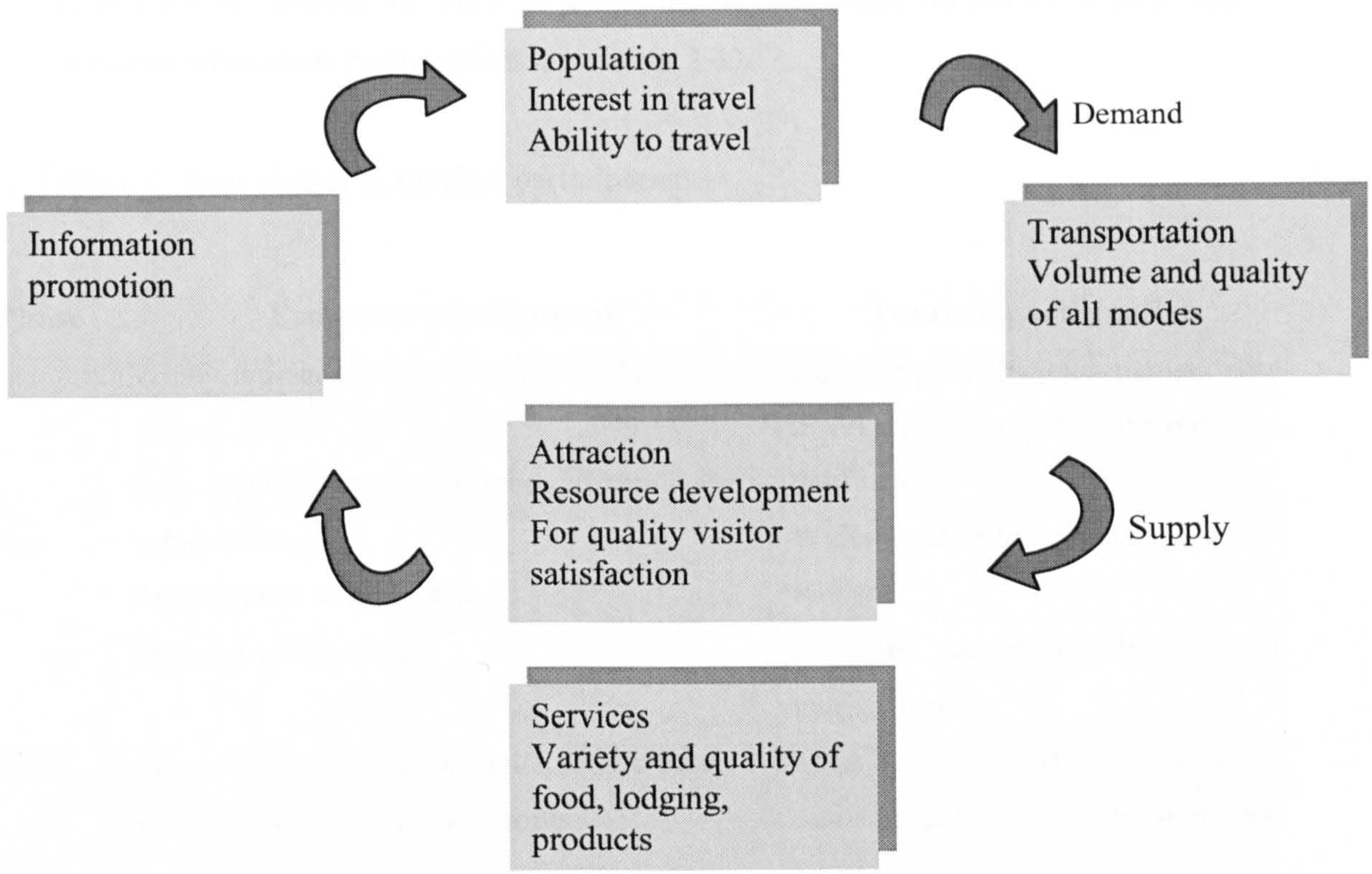
According to Gunn (1988) any one small part of tourism, such as a change in market preference or international currency exchange, can upset the rest of the system. Within tourism there are several important components whose functions greatly affect one another. One way of illustrating how tourism works is shown in Figure 2-2 and 2-3, which shows the major components of the tourism system:

Figure 2-2 the tourism system



Source: from Kaspar (1998 in Glasser 2003)

Figure 2-3 The functioning tourism system



Source: adapted from Gunn (1988)

The development trends of tourism are not uniform and, as such, tend to exaggerate the separateness of the structural elements within the system, such as hotels, airlines, and advertising. However, Gunn (1988) believes, important as these elements are, they tend to confuse rather than help in identifying the components important to tourism planning. Without attractiveness to tempt travellers, hotels, airlines, and advertising would not be needed.

2.2 Factors associated with increased tourism demand (push factors)

The single most important economic factor associated with an increased demand for tourism is probably the level of wealth in a particular country. Tourism tends to be highly income elastic so that the range and volume of tourism increases as a society becomes more economically developed and discretionary household income becomes available to an ever-increasing proportion of the population. Economic wealth is most commonly measured by the per capita Gross National Product (GNP), or the total

value of all goods and services produced by the country in a given year divided by the total resident population. In terms of economic development, Burton (1995) defines four phases of tourism participation (see Table 2-1).

Table 2-1. Four phases of tourism participation

Phase	Economic development	Tourism participation
One	Mainly subsistence –based and pre-industrial rural, agrarian large gap between poor masses and small elite	No mass participation a tourism elite travel to domestic and international destination
Two	Industrializing Rapid growth of urban area Growing middle class	Widespread participation in domestic tourism Increased scope of international tourism by elite
Three	Almost industrialized population mostly urban Middle class becoming dominants	Mass participation in domestic tourism, and increase in short haul international tourism Elite turns towards long-haul international tourism
Four	Fully industrialized, 'high tech' orientation Mostly urban High levels of affluence throughout the population	Mass participation in domestic and international(long haul and short – haul) tourism

Source: adapted from Burton1995 in Oppermann et al. 2000.

According to Burton's model (1995) phases three and four include the most important traveller generating regions. If this is true it is worthwhile looking at the type of tourism generated by these two phases and types of tourism generated by these regions.

2.2.1 Social factors

If one had to identify the major social trends that have influenced participation in tourism, it would include the increase in unrestricted time, its changing distribution and the shift in the way that society perceives this use of time. In phase one situations, the regularity of life is largely dictated by necessity, the seasons and the weather. Phase two societies tend to move away from this domination of nature and are instead characterized by an artificially constructed system. In this world the direction and constraints are such that leisure and rest are structured into rigorous segments of clock time, where participation in leisure is determined by work and school timetables and alarm clocks.

The amount of time that people are at work is clearly of importance to the development of the tourism industry, but even more important has been the introduction of the 5 day working week, facilitating overnight stays, as well as the concept of annual paid holidays.

2.2.2 Demographic factors

As any parent knows, children are expensive in terms of both time and money! Therefore, small family size is usually associated with higher levels of discretionary time and household income. If the per capita GNP and fertility rates of the world's countries are examined, a strong inverse relationship between the two can readily be identified. That is, fertility rates tend to fall as affluence increases. Modern birth control methods, driven on by material desires can explain this in part and so too can the decline in mortality and morbidity rates, making it less important to have so many children to continue the family. Also of great importance is the entry of women into the workforce and the removal of children as an important source of labour Oppermann et al. (2000).

All things being equal, a larger population base equates with a larger overall incidence of tourism activity. Burton's (1995) Phase Four societies tend to have large and stable populations, as compared with the earlier phases of development. Increases in life expectancy brought about by better diet and the technological advances of the

industrial and post-industrial eras. In the 1850s the life expectancy of males in the UK was just 40 years and the corresponding figure for females was 44 years. Today the average life expectancy for someone born in England and Wales in 2004 is 78 years. In a Phase Two society, such as that of Australia in 1901 men and women could expect a lifespan of just 55 and 59 years, respectively. This meant that the average male worker survived for only 5 years following retirement. Today life expectancy in Australia is similar to that of the UK being marginally higher in 2004 at 80.26 years. Thus, the average worker can look forward to 15 or 20 years of survival on leaving the workforce.

Furthermore, another push factor that stimulates engagement in tourism activities is urbanisation. This may, in part be a result of urban congestion, over-crowding and a loss of environmental quality but it may also be because of a correlation between urbanisation, higher levels of discretionary income and education, and lower family size.

2.2.3 Technological factors

Technological change may at one be seen as both a push factor and a pull factor. Aspects of technological change can increase the desire of people to travel (push) and at the same time make them more aware of the attractiveness of particular destinations (pull). Technological change also impacts on Leiper's tourism system by effectively shortening the effective or economic distance between origin and destination, or even making the journey an attraction in itself. The development of high efficiency and convenient forms of transportation (air travel) has clearly influenced the development of tourism and its distribution across regions.

An adequate infrastructure (transportation facilities and services, water supply, electric power, swage and solid waste disposal, drainage, and telecommunication etc) is necessary for the successful development of tourism. The lack of infrastructure can be problematical to the development of tourism in less developed countries and regions (Heraty, 1989 in Inskeep 1991).

Information technologies have also played an important role in the diffusion of tourism. Computerized reservation system (CRS), for example, are now the norm among travel agencies and carriers, providing greater flexibility, integration with other components of the industry and improved cost effectiveness Poon (1993).

2.2.4 Political factors

According to Gunn (1988), 'politics and foreign policy have much to do with international tourism'. A review of tourism politics generally suggest that the dimensions and results of tourism planning will be influenced most by the nation's ideology and its interpretation for overall social, political, and economic goals (DeKadt, 1979, p.33). In general one would expect the policies and practice for tourism to reflect the overall policies and practices of the nation as a whole. The roles of government bodies and their private sector counterparts will all, to some extent, be determined by the policies and practices and so too will the relative level of dependence on tourism. According to Cooper et al. (2003); Opperman et al. (2000); Gunn (1988) political factors have an effect on travels properties in a variety of ways, these include:

- The degree of government involvement in promoting and providing facilities;
- Control level of prosperity for travel overseas by limiting the amounts of foreign currency that can be taken out of the country;
- Government restrictions also include visa and passport controls as well as taxes for travel. (Cooper et al. (2003); Opperman et al. (2000); Gunn (1988).

For many years the United States' opposition to the political ideologies of China and Cuba and Libya was manifested by the prohibition of travel to such countries. Today, the United States is more relaxed in its opposition to these countries and new destinations have been subject to restrictions including travel to Iran, and North Korea. Further political complexities are exhibited by international organizations that foster tourism development, such as UNWTO or the Pacific Area Travel Association, and the Caribbean Tourism Association. If one examines the recent era of terrorism that has captured the media attention and distracted tourism flows, the underlying

problems can be associated with the policies and practices of both sending and receiving countries and regions. Ronkainen (1983) argues that political factors seem to offset the benefits created by the development of the technological factors.

2.3 Pull factors influencing a destination

The Pull factors are distinct from push factors as they are focused on the supply or destination side of the tourism equation rather than on tourism demand. As with the push factors, the use of the term 'pull' is figurative, since, of course, there is no actual physical pulling of tourists into a destination, or pushing of tourists out of a particular origin region Oppermann .et al (2000). Furthermore, as with all forms of motion, once in play it is sometimes difficult to distinguish between where a motion is a result of pull or push forces. It could be argued that the desire to escape (a push factor) is really a pull factor because it relies on there being somewhere to escape to!

One very important implication of this geographical differentiation between supply and demand is that, generally speaking, destinations are better positioned to exert influence over the pull factors than they are over the push factors. For example, a destination cannot significantly influence whether some other country evolves into a tourist-generating country, but it can make tangible efforts to develop its supply of attractions and create an attractive environment to appeal to potential visitors from that originating country.

The destination is a key feature within the tourism system, acting as the main motivating factor to stimulate tourism activity. The volume, value and type of tourism will depend on many factors such as quality, diversity, accessibility of the location and the attractions, accommodation and facilities offered. The destination is at the receiving end of the tourism system and consequently benefits and/or suffers from the events that take place.

- Geographic proximity to a market
- Accessibility to markets
- Availability of attraction
- Cultural links

- Availability of services
- Affordability
- Pro-tourism policies
- Positive image
- Peace and stability

2.3.1 Geographic proximity to a market

The number of visitors from an originating region to a destination is dependent on the economic distance separating the two. The economic distance may be longer or shorter than the geographical distance depending on the ease and cost of travel between the two regions. In general though there may be a strong correlation between economic and geographical distance as manifested in higher transportation costs and extended travel times. In addition, the volume of traffic is likely to be proportional to the size and prosperity of the origin market, with large and wealthy markets generating larger flows (Opperman et al. 2000). While tourism managers, of course, cannot change the geographical location of their destination relative to the market, distance can serve as an incentive to pursue strategies that will offset the tourism consequences of this distance.

2.3.2 Accessibility to markets

The effects of distance can potentially be counteracted by developments that make destinations more accessible to origin regions. This issue can be addressed in terms of infrastructure accessibility, subsidisation of transport and the development of tourism products that will appeal to travellers whose primary concern is not cost and political accessibility. Whether or not a suitable degree of physical accessibility can be maintained depends on many factors, including the availability of resources, physical barriers and the ability to coordinate business with other destinations and intervening jurisdictions in the transit region to establish effective air, land and sea linkages (Opperman et al. 2000).

Political accessibility refers to the conditions under which visitors are allowed entry into a destination. It is clearly critical to the success of international tourism. The right to allow or deny entry to potential arrivals is a basic sovereign prerogative of all states, and in some cases this right has been eroded or conceded altogether as a result of bilateral or multilateral treaties. For instance, permanent residents of Australia and New Zealand share the right to reside in each other's country for an indefinite period of time. Political access is one of the pull factors over which destination countries can exercise a high level of control, it is also a control that carries with it little or no direct cost for allowing access can be changed almost immediately and a little or no direct monetary cost to government. However, the consequential costs (economical and political) of restricting access may, perhaps, be quite significant.

According to Inskeep (1991), some countries may want to control tourism flows in order to limit outside influences on their religious and cultural systems, while other countries may wish to develop tourism rapidly for economic reasons. With respect to the former, it may be felt by the government that there are aspects of tourism that run contrary to the principles of Islamic law, in which case certain types of tourists and tourism activities may be deemed undesirable. According to Gunn (1988) in many regions, ideological stress sometimes reduces the efficient functioning of the tourism system. Polarized and antagonistic approaches to development versus conservation can slow and even deny tourism development. Even when planning, design, and management practices can reduce the level of conflict, they are not given a chance to do so because of heated ideological arguments.

2.3.3 Availability of attractions

There is widespread agreement among tourism researchers that attractions, because of their crucial role in drawing tourists, are one of the most important components of the tourism sector, and a major factor around which the development of a destination will depend (Gunn 1988; Inskeep 1991, Opperman et al. (2000); Cooper et al.(2003)).

In terms of the influence exercised within the destination itself, attractions range from those over which little control, other than conservation, can be exerted to those which are entirely 'created'. Examples of the former include spectacular natural features

such as forests, canyons or waterfalls or significant heritage/historical sites. Such features exist independent of any tourism activity and it is simply a matter of how those responsible for the management of tourism are able to exploit the available opportunities presented. On the other hand, destinations may, and often do, create attractions in order to introduce a tourist flow and/or to augment existing attractions. Examples may include such attractions as major theme parks (such as Disneyland) or in the case of natural attractions such as the Niagara Falls and the Gold Coast, where outstanding inherent natural attractions are augmented by theme parks, shopping opportunities and other attractions.

A final point to be made here about attractions is that the demand for them is not only vulnerable to events that alter perceptions of travel risk, such as political instability, they are also vulnerable to changes in fashion and social values, suggesting that the ability of a destination to manipulate the incoming tourist flows will always be subject to a demand–side factors beyond its control Opperman et al .(2000).

The extent of political stability of an area and popular perception of political stability, whether realistic or not, by the potential tourist markets is a significant factor in attracting tourists. Several destinations have and still do experience low volume tourism due to political disturbances, or concern by potential tourists about being affected by political disturbances, even though there have not been any specific problems in those particular destinations. A pattern of terrorist actions in particular areas can also be a deterrent to tourist travel in those places, or tourists may be reluctant to use particulars types of transportation that have experienced terrorist attacks Hall (1994).

Leisure tourism is a discretionary activity, and most tourists will not spend their hard-earned money to go to a destination where their safety and well being may be in danger. In this sense, when the attractiveness of a destination has been damaged or perceived negatively, the pull factors for these specific destinations and the role of tourism marketing staff and managers is far more difficult, particularly if they are in an early stage of development.

2.3.4 Cultural links

A desire to seek out unusual venues has certainly been one of the most important motivating forces for tourism throughout history. However, in spite of this, travel is still more likely to occur between countries that share similar elements of culture, such as language and religion (Burton 1995). In part, this is because of the increased probability that people will travel to culturally familiar countries and subsequently foster VFR tourist flows between their old and new countries. Furthermore, the tendency of destinations to attract culturally similar markets attests to the importance of convenience and risk-minimization factors in tourism travel. From a travellers point of view, regional travel or travel to similar destinations (as they may not be the same) may minimise their perceptions of risk as it reduces the uncertainties and numbers of unknowns in the travel decision equation.

2.3.5 Availability of services

Another pull related factor is associated with the level of services (quantity and quality) that is available at a specific destination. Tourists will tend to avoid attractions if associated services are not available or of poor quality. The importance of transportation accesses, the presence of adequate tourism-related facilities such as accommodation and related facilities and visitor bureaus are all obvious but vital services that have to be in place. At a broader destination level the presence of basic services non-specific to tourism, such as policing and medical facilities, may also be critical as they can help reassure the tourist that travel-related risks, such as crime or health, are being minimised or at least mitigated if the worst should happen. The private sector usually responds to the tourism-related elements, while public sector authorities tend to provide the general services. In general, the tourism generating countries are able to offer a superior level of general service provision because of their greater wealth and higher level of physical development Opperman et al. (2000) and therefore one could argue that it is the relative provision (from the point of view of their norm to the provision within the destination) of such services that will determine the level of risk perceived by tourists.

2.3.6 Affordability

Tourism, like most goods and services, is faced with a downward sloping demand curve. Therefore, all other factors being equal, a reduction in cost will generate an increase in the number of tourist arrivals to a destination. The cost of living in a destination region relative to an origin area is another important factor, since a high proportion of total trip costs are normally incurred within the destination. Many travellers from the more affluent countries are attracted to LDCs such as Indonesia or Thailand because of the low relative costs of locally-provided goods and services. Because of this price effect, the tourist flows are usually highly sensitive to significant exchange rate fluctuations.

Although destination may have little short-term influence over the cost of living differential between originating country and destination, they may have some degree of influence over exchange rate stability, as national government can and sometimes do intervene in the money markets, instigate currency revaluations, etc., when such actions are deemed to be in the national interest Opperman et al. (2000). Again stability reduces uncertainty and therefore reduces the financial risk for potential tourists. Therefore, destinations that exhibit exchange rate stability may find it easier to maintain their tourism flows, all other things being equal.

2.3.7 Pro-tourism policies

The pull effect of a destination can be positively influenced by the introduction and reinforcement of pro-tourism policies by the government. It can take place in different ways among the local population to promote a welcoming attitude toward visitors, in order to create a positive market image. Countries such as Thailand and the Solomon Islands positively encourage this image to attract tourists to their destinations. However, a brief search on Google will show that many destinations not normally perceived as friendly also stress the friendliness of their destination in an attempt to mitigate bad publicity or image. Even where there is an innate friendliness, however measured, associated with a destination, this can be countered over night by random acts of violence. Other pro-tourism measures available to governments include the

easing of entry requirements and the reduction or elimination of tourism-related taxes, duties and other costs incurred by tourists or the tourism industry.

2.3.8 Positive market image

Like any individual, the tourist's knowledge of the world is made up of experience, learning emotions and perceptions. Such awareness described as knowledge results in a specific image of the world. This image is critically important to an individual's preference, motivation and behaviour towards tourist products and destinations, as it will provide a 'pull' effect resulting in different demand schedules (Glaesser, 2001). This knowledge and image will also be coloured by the perception of travel-related risk for various destinations. There are various kinds of definitions adopted to describe the world image in different fields. The UNWTO defines image to be:

- The artificial imitation of the apparent from of an object;
- From resemblance, identity;
- Ideas, conceptions held individually or collectively of the destination.

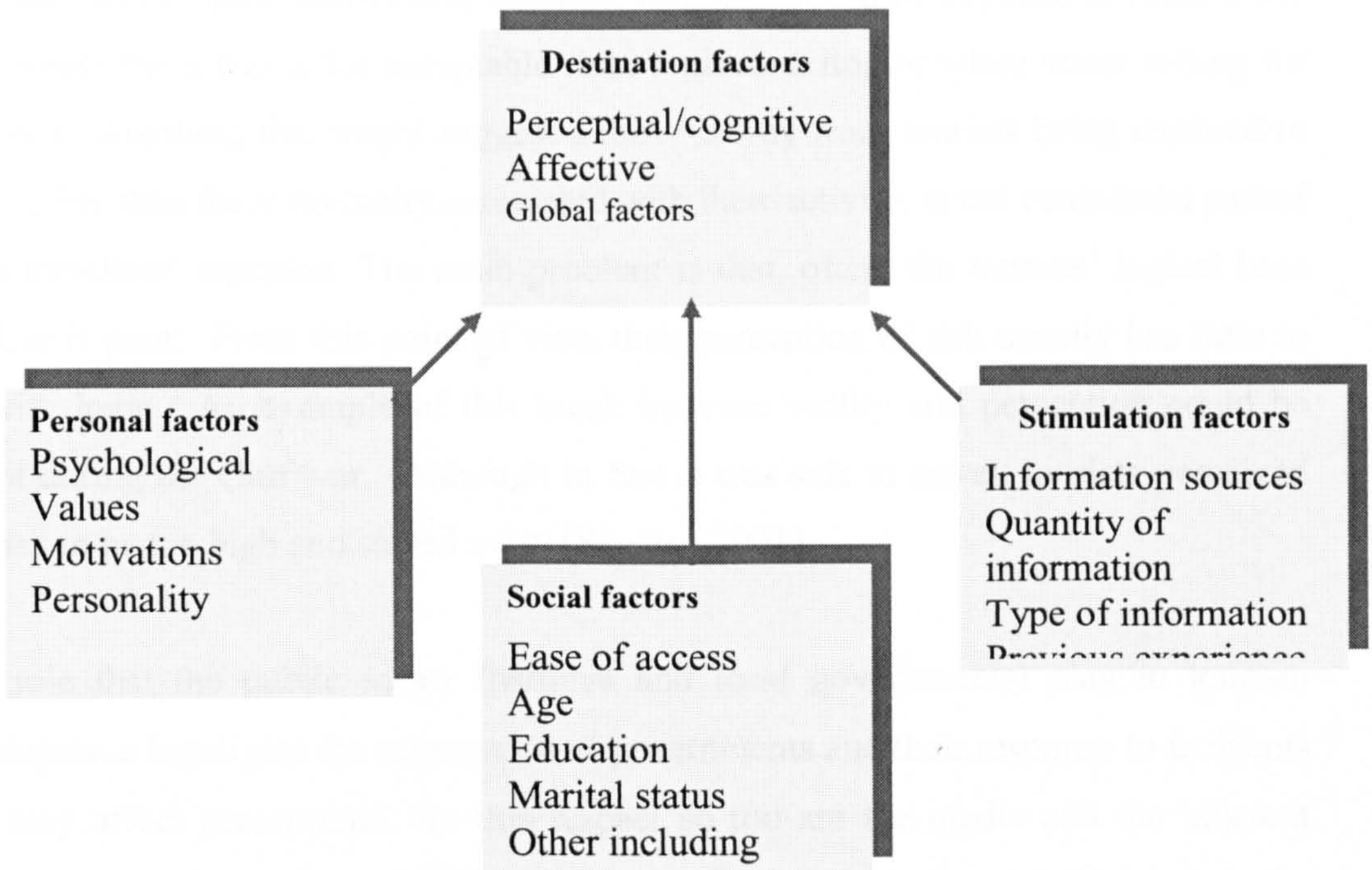
Trommsdorff (1990, p.121) describes image as 'a multidimensional construct made up of denotative and connotative product characteristics, which simultaneously reflects the structure of a one dimensional attitude phenomenon'. If the attitude towards characteristics was illustrated along a good-bad range, 'the image has characteristics on several dimensions, namely the subjective impressions of the product's individual (non–material) characteristics'. Image may be defined as the sum of beliefs, attitudes and impressions held by a person or group of people towards some phenomenon (Crompton 1979; Baloglu and Brinberg 1997). In general, images can be either descriptive or evaluative (Walmsly and Jenkins 1993). Images are of immense importance in discretionary forms of tourism such as recreational vacations, where the destination is not predetermined by business demands or social necessities. This is because the product, at least for the first-time visitor, is an intangible one that cannot be directly experienced prior to its consumption. In these cases, potential visitors must rely on their images in choosing one destination over another.

According to Glaesser (2003), the general image of a country is built routinely and separately of whether the country in question is a holiday destination. The image is a result of general information that the consumer continually takes in during their everyday life. It is the constant news stream of political, economic and social events as well as the impressions that have been gained about the country's products when actively seeking a destination. The result is a non-tourism specific country image. The term country image used in the following can be seen as being synonymous with destination image. As a rule, however, this image is closely related to political or geographical borders with which the country's characteristic details are particularly emphasized (Meyer, 1981; Fakeye and Crompton, 1991 in Glaesser 2003).According to Mayerhofer (1995, p.142), country image particularly influences the following area:

- Population characteristics,
- Countryside,
- Cultural aspect,
- Landmarks,
- Food and beverages,
- Famous personalities,
- The country's competence as product and service manufacturer
- Representative products of the country.

Glaesser (2003) argues that a country's image is also formed dependent on the respective political system and the relationship with other nations. In that sense, a national component of consumers has to be taken into account for the country's image assessment, similar to the cultural difference of risk assessment previously discussed. Many tourists consider Iraq and Afghanistan to be high risk destinations due to the lasting political tensions. Therefore, they prefer products from 'free' countries to those from 'un-free' countries (Lebrenz, 1996; Sonmez and Graefe, 1998) or judge products from more developed countries to be of a higher quality (Lebrenz 1996). All of these factors may be considered, to some extent, stereotyping destinations into risk categories, but it is this process that often prevails when individuals consciously or sub-consciously assess their travel risks. Baloglu and McCleary (1999) define the categories of factors which influence destination image (see Figure 2-4).

Figure 2-4 Influences of destination image



Source: adapted from Baloglu and McCleary (1999) in Beirman (2003)

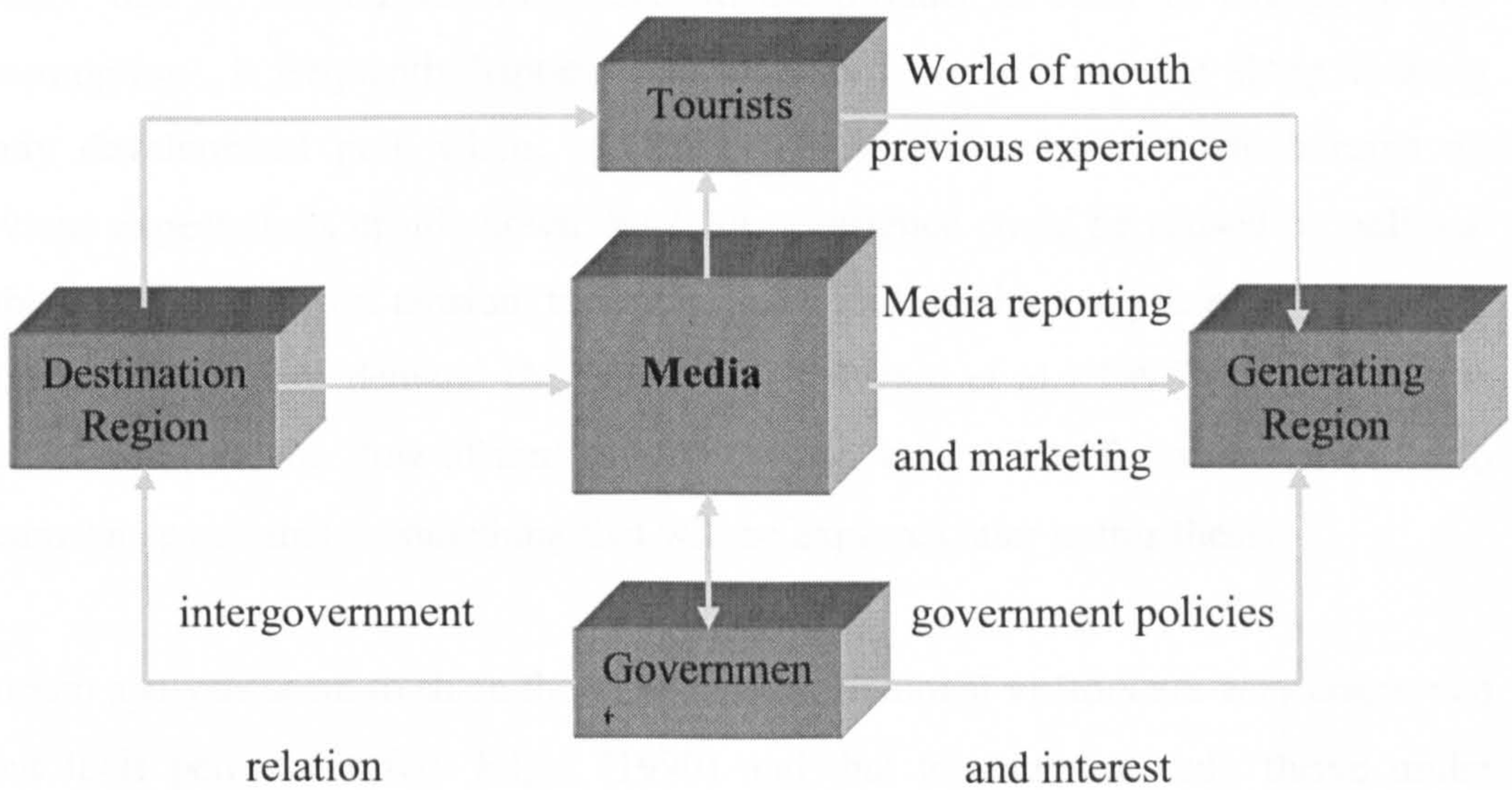
The potential tourist must be aware that a destination exists. This is generally not a problem for well known destination countries such as the United States, France, Italy or the UK but it is a major problem for the more obscure countries such as Namibia, Surinam or Qatar. Next, it is vital that the awareness of the potential destination is of a positive nature. The issues of political stability and political relations within and between states are extremely important, because of the intangible nature of the travel experience; tourism depends heavily on positive images (Chon 1991;Echtner and Ritchie 1991; Gartner 1993; Bramwell and Rawling 1996; Dann 1996). Random acts of terrorism limit travel activity until the public's memories of the publicized incidents fade. Repetitive acts of terrorism, however, can tarnish a destination's image of safety and attractiveness and put at risk its entire tourism industry. As far as the tourism originating country is concerned the perceived risk of a particular destination is everything because it is that perception that will influence demand.

It can be argued that there may be more likelihood of being involved in acts of violence and other incidents at home where the statistical odds are much greater than, say, being mugged in London's street or murdered in Egypt. However, the reality is

that tourists travel in order to experience travelling attributes such as relaxation, pleasure, peace, calm, enjoyment, comfort, etc., and not to be exposed to risks, other than where the travel is for acceptable risks such as skiing or white water rafting for instance. Anything that might suggest a move a way from tourists being exposed to risks, other than those normally associated with their activity, is not considered part of most travellers' equation. The main problem is that, often, the tourists' logical base for fear is poor. From this point of view their perception of risk usually has little to do with logic. An example of this break between reality and perception could be Egypt during the Gulf war. Although in fact it was safe to travel, tourists perceived the risk to be too high and stayed away (Santana 2001).

The role that the public sector (national and local governments) play in tourism development highlights the importance of governments and their response to incidents that may affect perceptions. In this respect so too are the media and the inherent tourists' perceptions of a destination in determining the effective attitude towards the political characteristics of a destination and its tourist image (see Figure 2-5).

Figure 2-5 Political instability, violence and image-making process



Source: adapted from Hall. ,et al. (1994) in Pizam et al. (1996).

A study of three major tourism offices dealing with major crisis which affected their destination (Hong Kong after Tianamen Square student massacre in china; Fiji, after a

bloodless military coup in 1987; and San Francisco, after the Loma Prieta earthquake in 1989) revealed that a crisis can very quickly cripple the travel industry (Cassedy 1992). In these cases the crises to the industry were ones of perception and it was observed that they could be just as devastating, if not more so, than the physical damage created by the crises. The industry suffered because people lost their confidence in the destination as an attractive and safe place to visit and stay in, safety *mis*-perception can indeed be a formidable issue for destinations.

2.3.9 Peace and stability

The relationship between tourism and peace has two dimensions. On the one hand, tourism can be vital force for world peace (UNWTO, 1980) and on the other, tourism needs peace for its development and prosperity. The nature of the concept of peace is very diverse. One definition says that within the context of tourism, peace applies to the concept of harmonious relations (Var et al. (1994) in Pizam et al. (1996)).

The tourist market is sensitive to the existence of social or political instability within destinations because of the simultaneity of production and consumption of the tourism product, that is, consumers must travel to the product in order to engage in this 'consumption'. It frequently happens that tourism demand is running along a strong steady development path when, suddenly, a new factor appears which turns all previous expectations upside down. Such an occurrence could be caused by political problems (war, political tension, terrorism, etc.), and can have a powerfully negative influence on tourism demand (Mihalic 1996 in Pizam et al. (1996)). However, the effects of this on the flow of tourism activity can vary wildly from circumstance to circumstance and this is something that will be explored later in this thesis.

Tourism analysts seem to share the view that international visitors are very concerned about their personal safety Edgel (1990) and that tourism can only thrive under peaceful conditions Pizam et al. (1996). People travel for many different reasons. Regardless of their purpose of travel, their decision to travel is based on several psychological traits, such as desire for adventure, peace, comfort, education/experience and so forth. However, none of those desires have the capacity to over-rule one of the most basic human desires – that of safety. It is important to

emphasise that the safety in this case refers not only to actual safety but, more importantly, to perceived safety. An examination of the growing body of literature that analyzes the relationship between tourism activity and politically motivated violence, (and any other situations that reduce the feeling of security at a destination) indicates that they all severely inhibit tourism (Ryan 1993; Mansfeld, 1995; O'Sullivan, 1996; Sonmez 1998; Wahab 1996; Hall and O'Sullivan, 1996).According to Ritcher and Waugh, 1986, p, 231:

> "Tourism may decline precipitously when political conditions appear unsettled. Tourism simply chooses alternative destinations. Unfortunately, many national planners either do not understand or will not accept the fact that political serenity, not scenic or cultural attractions constitute the first and central requirement of tourists".

Moreover, as far as tourism is concerned security issues always have spillover effects. That is, tourists tend to associate a security incident not just with a specific location, but with an entire region. According to Ritcher and Waugh (1986) the negative effect of instability on tourism is not necessarily confined to a central war zone or even to the period of actual conflict. Ritcher and Waugh (1986) demonstrated the destabilizing impacts of the Sri Lankan civil war upon tourism in India and Maldives, and of the war in Afghanistan on tourism in Pakistan. Accordingly, and not surprisingly, significant declines in the number of tourist arrivals have occurred during periods of warfare in the Middle East (Mansfeld 1994).

In many cases, it is a question of being guilty by association, as shown by fact that the tourist market extends what is happening in Iraq to the entire Middle East region. Similarly, the un-informed potential tourist may apply a national stereotype to all destinations within a particular region, perceiving all people in Middle East to be strictly Muslims or even practise it. Such extensions and stereotypes can, of course, complicate the ability of tourist destination managers and marketers to project a positive image to the tourism market.

Some authors argue that, on a macro scale, the low growth in international stay-over arrivals in the Middle East that was recorded in 1991, was only in part attributable to the Gulf War itself, and was also because of the market insecurity that was generated in the month preceding the conflict (French 1991; Watkins 1991). While Wahab

(1996, p 176) suggested that it is important to note that tourists are not discouraged from travelling altogether when there is a crisis of some form, but rather deflected to other destinations. Thus, when some event deters tourists from visiting one particular destination, other destinations, whether proximate or far away, may well benefit. Turkey is an example of drawing benefits as result of war, and political tension in Middle East since 1979 (BBC, 21.09.05). Santana (2001) argues that a change in the primary purpose of travel could happen because of security issues. Generally speaking, the strength of the effect on the destination subject to crises may be dependent on the strength or uniqueness of its attraction. For instance, a cultural destination like Egypt or capital city like London cannot be easily substituted whereas destinations that simply rely on the '4s' can find that their products are replicated in many other destinations and can be easily substituted.

Political instability refers to circumstances where conditions and mechanisms of government and its rule are challenged by elements operating from outside of the normal operations of the political system (Hall et al. 1996). When challenge occurs from within a political system and the system is able to adapt and change to meet demands on it, it can be said to be stable. If the forces for change fail to be satisfied from within a political system, the use of non-legitimate activities such as protests, violence, or even civil war to seek change may render the political situation unstable. Political instability, whenever it occurs (particularly when it is accompanied by acts of violence or hostility of any kind) is likely to have a damaging effect on the tourism industry (Ritcher and Waugh 1986; Lea and Small 1988; Millman 1989; Mansfeld 1995; Bar-On 1996; Vukonic 1997 in Wahab et al.(2001); Santana 2001). The development of a successful tourist industry depends largely on political stability (Mansfeld 1995; Sunmez 1998; Teye 1998; Hall and O'Sullivan 1996). Political instability can take a number of forms including: international wars, civil wars, coups, terrorism, riots, religious and ethnic conflicts, political and social unrest, and strikes (Hall, 1996).

The increasing economic disparity between developed and developing countries and its consequences such as poverty, increasing state debt, population explosions and inadequate living standard have contributed significantly to the instability of some regions. These factors have led to local wars and crises, ethnic and religious conflicts,

and resulted in regional arms races and the proliferation of weapons of mass destruction. Consequently, it has become a major threat to local, regional, and international security. Instability and a state of disorder in some regions have also encouraged drug trafficking and international organized crime. Regions that have been affected, among others, are the Balkans, some regions of the former Soviet Union such as Uzbekistan, some parts of Africa and Asia, some countries in Latin America, and some parts of the Middle East. All of these factors and resulting states will hinder tourism development in general and increase perceived and actual risk levels associated with international travel and tourism. It is important to emphasise that terrorism may also result from political instability (Hall and O'Sullivan 1996; Vukonic 1997; Sonmez 1998).

Political instability is believed to have strong adverse effects on economic prosperity. However, to date, the evidence on this matter is scarce, probably because it is difficult to know how economies would have evolved in absence of political conflict Abadie, et al.(2003). An extensive VAR study of the macroeconomic effects of terrorism (Blomberg et al. (2004a) and Blomberg et al. (2004b) used a panel set with annual observations for 177 countries from 1968 to 2000. It controls for the interactions between terrorism and other forms of internal and external conflict and it is therefore able to differentiate between types of political disruption. On average, terrorism (captured by the ITERATE data) is found to depress economic growth in a market. However, this effect is considerably smaller and less persistent than that exerted by, say, external wars and/or internal conflicts. Frey et al. (2004) concluded that the negative association between terrorism and economic growth is small and statistically insignificant for advanced (OECD) economies, which are most affected by terrorism.

Given that tourist destinations may offer easily substituted products, crisis–hit regions are usually left with the difficult, long, and always expensive task of rebuilding their image and regaining the trust of travellers. The resilience and ability to cope with the crisis situation and to attract tourists back, is largely dependent on their stage of tourism development. It is also sometimes dependent upon the level of diversification of the local economy, its strength and the scale and nature of disaster.

2.3.9.1 War, coups and revolution; their impact on tourism

War is defined as the clash of arms among countries (Lexicon 1987 in Pizam et al.(1996)). Since the tourist product is inextricably connected to the destination, some of its fundamental components are its attractions, such as natural and socio-cultural factors (Kaspar, 1991). According to Burkart and Medlik (1974, p 193 in Pizam et al. (1996) attractions may be defined as those elements in the tourist product which determine the choice of the tourist to visit one destination rather than another. In the case of war, the war itself with all its dimensions becomes part of the tourist product. Normally the state of war reduces the destination's level of attractiveness and, in some cases, tourist demand may even drop to zero. The war disrupts both sides of tourism, supply and demand. Teye (1988) described the following impacts of war on tourism:

- Borders are closed for land, air and sea transport (although it could be only some portion of the borders);
- Foreign authorities recommend that their citizens do not travel to War – stricken states for reasons of personal safety;
- Maltreatment of tourists travelling to a state involved in war;
- Adverse publicity through the international media;
- "Blacklisting" by tour operators and travel agents.

On the side of tourist supply, there are two types of impact: the one influencing tourism development and the other influencing the existing tourists supply. The related consequences are:

- Development plans are reduced or cancelled (if any development plans exist);
- Loss of investment capital from abroad;
- Loss of tourism infrastructure;
- Destruction of game parks due to excessive poaching;
- Consequence on night life (curfews);
- Military blackmail;
- Emergence of a foreign–currency black market.

Vukonic (1993) also describes the problem of war refugees, which can destroy the demand for a certain destination. In war conditions, the population may flee from the conflict area and be relocated in tourist areas, but this has several consequences for tourism:

- Letting rooms for refugees precludes letting them to tourists;
- Long-term accommodation of refugees in hotels results in damage or loss of quality to hotel equipment and facilities;
- After the hotels are vacated by the refugees, they have to be refurbished which involves additional capital spending and prevents their use for a further period;
- The presence of refugees in tourist destinations has a negative impact and tourists may try to avoid them.

Although the first Gulf (1991) War was limited in that it did not involve the whole world (Vukonic, 1993), it did have a strong negative impact on the growth and development of international tourism (Impact of the Gulf Crisis on International Tourism, 1991). According to the UNWTO, the number of tourists fell by 1.4% for the first time after a nine-year period of constant growth, and international traffic from Japan and United States was reduced by 2%.

At the same time, the development of tourism was being influenced by another factor, economic recession was hitting most of the major tourist–generating countries. Archer (1994) suggests that this factor was even more significant than the effects of the war. Not only were the tourist flows to the Mediterranean, Europe and the Middle East reduced but the influence of the Gulf War and economic recession was even felt by the Australian tourist industry (Row, 1993), and even American domestic tourism such as Hawaii and Florida was affected (Goelner 1992; Anderson and Anderson,1992). The Gulf War kept Americans from taking holidays. It affected both leisure and business travel (Jusko 1991), but the war itself had a short-term impact on international travel. During 1990, the threat of war and international terrorism caused a substantial decline in international tourism. However, when the war ended, tourists did not return immediately to the Middle East because they had already booked their holiday elsewhere. In a destination not only does it reduce the number of visitors to

the destination itself, but indirectly reduces the volume of transit tourism, and, in so doing, affects neighbouring countries. Tourist flows inside the region may be redirected from affected countries toward other competing countries such as the impact of War Balkan (Vukonic, 1993).

However not all types of tourism destinations suffered equally from the decline in tourist demand. The magnitude of the effect may be determined by a host of factors, such as the stage of tourism development (where in the tourism area lifecycle the destination is located) such as that proposed by Butler (1980) and Plog (1983); and the motivation for travel, perhaps the type of tourism most sensitive to being influenced by war is leisure tourism. Such influences could be seen in the case of Slovenia. The decline in the total nights spent in Slovenia was 49 percent; whereas the volume of nights spent in health resorts declined by only 19 percent, the number of nights spent in sea resorts fell by 52 percent; the number of nights spent in mountain resorts fell by 36% and other tourist destinations by 45 percent. Clearly fears over personal safety affect the level of demand for particular tourism products (see Teye, 1988). However, the impact of war or conflict may leave sites that become an attraction later. When the war is over, the sites become part of historical memory for a certain destination; however, this aspect of the effects of incidents and events is outside the scope of this research.

In conclusion, war undoubtedly brings with it negative effects on the level of tourism activity (Michlic 1996 in Pizam et al.(1996)). In most cases, it causes reorientation of tourist flows. The impact is not over after war has run its course and the particular destination may suffer well into the future due the negative image toward the destination.

2.3.9.1.1 Terrorism: definition, patterns and causes

Definitions of terrorism have not yet gained universal acceptance (Sonmez and Graefe(1998). The US Department of State has provided some definitions in terms that are generally used and applied when terrorism is discussed. For the US Department of State *the term terrorism means premeditated, politically motivated violence perpetrated against non-combatant targets by sub-national groups or*

clandestine agents usually intended to influence an audience. The term international terrorism has been defined as terrorism involving citizens or the territory of more than one country, and the term terrorism group as any group practising, or that has significant subgroups that practise, acts of international terrorism (1999 in Wahab et al. (2001)). Weinburg (2005) suggested:

"Terrorism is a tactic rather than an ideology. It's a way of -- a largely theatrical way to influence the behaviour of a variety of different audiences... So terrorism can be used for purposes of freedom fighting, along with any number of other political objectives".

According to Enders et al. (2001):

"Terrorism is a premeditated use or threats of use of extra normal violence or brutality by sub-national groups to obtain a political, religious, or ideological through intimidation of a huge audience, usually not directly involved with the policy making that the terrorist seek to influence".

Key ingredients of the definition include underlying political motives, the general atmosphere of intimidation, and the targeting of those outside of the decision making process. Terrorists often choose their target in a way that appears to be random so that everyone feels at risk, when getting on a plane, entering a federal building, or strolling through a market square. Business people, military personnel, tourists, and everyday citizens, rather than politicians, are generally the target of terrorist attacks.

Terrorism is not a new fact and has been used as a political weapon in virtually all parts of the globe. Sendero Luminoso(Peru), the IRA (Northern Ireland), ETA(Basque Separatist Group-Spain), the Red Bridge (Italy), the Fundi (Algeria), the Abu Nidal organisation (Iraq), the Hizbollah (Lebanon), the Khemer Rouge (Cambodia) and the Al-Qaeda are just a few examples of some well–established terrorist organisations.

Terrorism causes have been attributed to religious fanaticism, political instability, chronic economic problems, famine and disease, environmental problems, demography, lack of opportunities, lack of education, civil unrest, wars and guerrillas, and poverty among others. Nevertheless, there is little evidence to suggest that poverty, as well as lack of education or injustices are direct root causes of terrorism (Robenstain, 2002). According to Krueger and Malekova (2002), terrorists in the

Middle East have not only enjoyed a living standard above the poverty line, but normally had a secondary education. Von Hipple (2002) adds that the hijackers of 9/11, who attacked the USA, were neither poor nor uneducated, acknowledging that they even qualified to take flight lessons and acquire the technical skills to accomplish their task. The finding of both Von Hipple (2002) and Krueger and Malekova (2002) confirm previous research results (such as that found by Pizam and Smith, 2002) which suggest that terrorist acts are often rooted in deep social, political and sometimes religious motives. Krueger and Malekova (2002) come to the conclusion that 'terrorism (is) more accurately viewed as a response to political conditions and the long term standing feelings of indignity and frustration' (2002).

According to Sanatana (2001) the globalization process, provides the right conditions and environment for terrorism to flourish and become more deadly. Globalization has excluded more nations than it has included in the ways of development and prosperity. This has led to unprecedented levels of unemployment and economic hardship in many parts of the world and a sense of discontent and resentment towards some nations and peoples.

The terrorist groups are not generally viewed internationally as a single group but according to US Department of State, in 1988 seven countries were identified as sponsors, in different ways, of terrorism activities: Cuba, Iran, Iraq, Libya, North Korea, Sudan and Syria (US Department of State 1999). The US Department of State made it clear that the majority of the most violent terrorist attacks would not have been possible without such state sponsorship. State sponsorship mainly provides safe haven facilities, financial support, weapon, training, logistic support and the use of diplomatic facilities.

Ritcher and Waugh (1986, p238) have recognized that the relationship between terrorism and tourism is important not just because the problem is new, but also because the political and economic ramifications are huge and likely to grow larger. Because of its international visibility, tourism is a ready-made target for terrorist groups who are seeking to gain publicity for their objectives. Acts of terrorism are immediate, sudden events, which invariably involve a great number of agents in responding to the incidents and large media coverage and inspections. Frey et al

.(2004) suggest that it remains an open question whether tourists' reaction to the threat of terrorism is rational.

2.3.9.2 Tourism as the indirect victim of political instability

Tourism is extremely vulnerable to what tourists perceive to be political instability or a lack of personal safety. Examples are the student protests in Beijing's Tianamen Square 1989 or the wars in Bosnia- Herzegovina Although the duration of political violence may have been short lived, the long –term implications for tourism can last for many years, affecting the confidence not only of tourists but also potential investors in the tourism industry (Hall, 1994).

2.3.9.3 Tourists as a target: tourism as the direct victim of political instability

Tourists have become a frequent target of terrorist acts in recent years generating high levels of profile in the media (Frey et al. 2004). Most of the violence has played on tourism motivations, generating fear and insecurity among travellers and creating a major barrier to travel and thus a limitation on the growth of the industry. In addition to the openly stated fear of personal harm, there is often a lack of interest in travel, which can mask an underlying fear. In these circumstances, the possibility of terrorism, however remote, will significantly affect tourism demand (Buckley and Klemm, 1993.p 191 in Pizam et al.(1996); Santana 2001). From a general point of view, terrorist activity may only cause a slight decline in the volume of tourist activity provided that tourists are not explicitly defined as the target. This situation changes suddenly, however, if the terrorist acts leads to tourist casualties (Wilkinson 1993; Sonmez,1998a). Different circumstances can be distinguished either where the tourists are identified as a symbol of the originating state, or as a part of the economic system of the destination. Whilst, in the first situation, the group of endangered people can be clearly defined, this is more difficult in the second case, where almost every tourist can be the target of an attack (Glaesser 2003).

Sonmez and Graefe (1998) found that many terrorist incidents are primarily focused on the tourism industry. In this context newspapers suggested that after the Bali bombings the question was whether tourists were 'scapegoats' and soft targets

(Korneliues, 2002) or whether the tourism industry itself is provocative and provocative enough to lead to violent responses including, in extreme cases, terrorist acts (Faz,2002).

According to Sanata (2001) in the case of terrorism, tourists may be the very target of terrorist actions. With increasing numbers travelling, terrorist groups, political guerrilla groups etc., have seen in the tourism industry the opportunity they need for directing the attention of the international community to their causes. Blowing up aircraft full of passengers, hostage taking, kidnapping, gunning down tourists, and targeting tourism facilities, are just a few examples of criminal acts directed at the industry in recent years. This is not, however, the sole privilege of developing or third world countries' or regions. Within the main developed blocs in the world, these kinds of activities involving tourists are still happening and in some cases intensifying (9/11/01 New York and Washington, Madrid bombings 11/03/04, London Bombings 07/07/05.

Frey et al. (2004) argue there is a simple rationale for these attacks. Individuals planning their holidays are less likely to choose a destination with higher threats of terrorist attacks. Host countries providing tourism services, which can be easily substituted, are, therefore, negatively affected by terrorist attacks to a substantial extent. The expected response of tourists as a result of bombing, shooting and kidnapping is for tourists to stay away thereby inflicting severe economic damage to the state. The nature of the threat posed to tourists, then, is quite different from that of political instability. Domestic tensions rarely involve tourists and tourist involvement is usually by coincidence rather than by design. Therefore one would expect there to be differences in the level of risk averseness with respect to acts of terrorism and more general political instability.

Some academics argue that terrorism could be a reaction to irresponsible tourism development (Aziz 1995, p.93, for Egypt). Hall (1994a) believes that attacks on tourists or tourist facilities can be used by terrorist to achieve a range of tactical, strategic and ideological objectives. One of the most common reasons for terrorist attack is to gain publicity. When a tourist is kidnapped or killed, the situation is instantaneously dramatized by the media, which also helps the political conflict

between the terrorists and the establishment. Terrorists achieve the exposures they crave (Richter 1983) and the media increases its circulation or ratings and of course, the losers include society as well as those destinations which suffer as a result of the negative images such coverage spawns.

Santana (2001) argues that terrorist attacks on the tourism industry are often justified on the basis that the tourists or tourist facilities represent a threat to their culture, value system, religious convictions or because they represent capitalism. Egypt, with respect to attacks on tourists, is an example of how tourists and tourists' facilities can be targeted by terrorist organizations in an attempt to achieve ideological objectives and to strengthen their claims to political legitimacy by making the incumbent government yield to their demands (discussed more fully in chapter 3).

Terrorist groups aim their actions at ordinary people, although their ultimate target remains the political authorities that they hope to force into meeting their demands (Long 1990, Wardlaw 1982 in Norris et al. 2003). Fear or perceived risk plays an important role in this process. 'Terrorists hope to sow the seeds of public disaffection with government, weaken public support for tough antiterrorism policies, and disrupt social ties through the creation of fear and anxiety '(Wardlow 1982). Wardlow added:

> "While the primary effect of terrorism is to create fear and alarm, the objectives may be to gain concessions, obtain maximum publicity, provoke repression, break down social order, build morale in the movement".

In Eastern Turkey in 1993, members of the Kurdestan Worker's party seeking the establishment of a separate Kurdish state kidnapped a number of tourists. Australian, French and British tourists were abducted and held hostage in order to raise the profile of the Kurdish separatists in the world media. More recently, in October 2002 attacks in a night club on Bali claimed the lives of more than 200 international tourists. Terrorist attacks on tourists can also be used to punish nationals of a country which supports the government which the terrorists are trying to overthrow or which is in opposition to their own activities. For example, Ritcher and Waugh (1986) note that attacks on American tourists may be viewed as a form of punishment of the United State government for its foreign–policy decisions and military actions. Whatever the aim the results are often indistinguishable.

According to Hall (1994a), tourism is affected by terrorism through two means. First, terrorist activities can damage a destination or country's tourist industry by creating an image of lack of safety. The deterrent effect of terrorism on tourists in a particular country may benefit the tourist industries in competing destinations. On the other hand, tourists may fear that terrorism could spill over into countries previously not involved and therefore abstain from visiting neighbouring countries. This is happening in the Middle East, (Frey et al, 2004).

Secondly, tourists or tourists' facilities, such as airport terminals (Sri Lanka airport or aircraft, attacks on 9/11), may themselves be subject to attack (Luxor, Egypt 1997). Tourist facilities are logical targets of terrorist violence because they afford opportunity and relative safety for terrorists to act (Ritcher and Waugh, 1986, p233). Estimated impacts of terrorism on tourism vary considerably, because the structure of the tourism industry and terror campaign differs, not only from country to country, but also over time (Frey et al. 2004). The trends analysis also suggests that there is persistence in each of the incident series, high and low levels of terrorism tend to come in wave or cycles. The shock to a system because of an incident is not permanent, so that there its impact is one of being a declining trend toward a long-term mean. Enders and Sandler (1999) and Enders, Parise, and Sandler (1992) argue that logistically composite events such as skyjacking, large suicide car bombings, and assassinations will have longer cycles than less sophisticated events. Drakos and Kutan (2003) argue that the estimated impacts of terrorism vary considerably, because the structure of the tourism industry and terror campaigns differ from destination to destination or within a destination over time

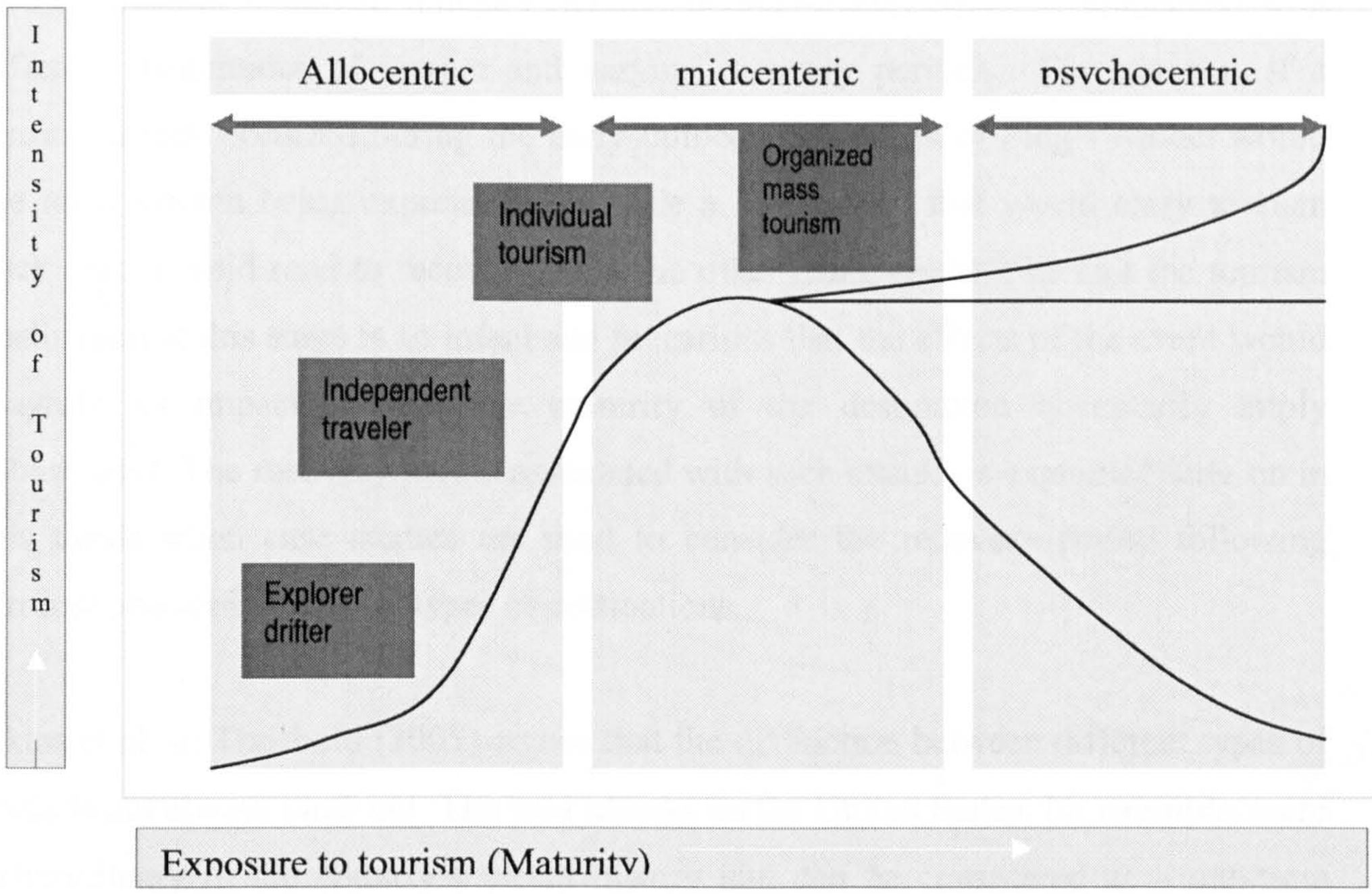
This makes it difficult to construct a unified framework within which one can study the impacts. Instead, it emphasizes the importance of differentiating between different types of attacks. The location of an attack whether it takes place in an urban or rural area, the number of casualties and the market structure (Drakos and Kutan 2003). Invariably, the net result is that the industry's profitability is affected due to both travellers' responses to the event and the enormous amount of effort the industry has to exercise to lure tourists back. The following are examples of the nature of the impacts:

- Employment in destination countries and businesses in generating countries may be hurt (tour operators, travel agents, hoteliers, ...);
- Neighbouring countries may also lose inbound tourists;
- Airlines suffer from low demand and when they are involved there may be legal disputes over compensation or damage claims from victims of incidents, or awards for loss of life;
- Due to its economic significance, tourism is immensely important politically for both developed and developing nations. Whenever international terrorism occurs, its impacts are seldom localized and it has repercussions on the whole country, or region, as well as on political relations between countries.

Although short-term impacts of terrorist attacks are relatively easy to predict, the long-term effects depend on a large array of issues and are more difficult to anticipate. There follow some examples of long–term influences (Cooper 1991; Glaesser, 2001):

- How events are perceived by the public and tourism trade;
- The stage of development (see Figure 2-6);
- The strength of the industry (see Figure 2-6);
- The kind of product (how easily it can be substituted, Pyramids in Egypt , Eiffel Tower in Paris or pilgrimage destination like the events of Haj in Maka);
- The level of government commitment to the industry;
- The determination of law enforcement agencies to contain and/or eliminate threats;
- Type and intensity of incident.

Figure 2-6 The approach to studying socio – cultural impact of tourism



Source: from Butler and Plog in Cooper et al. (2005).

According to Plog (2001) most destinations follow a predictable, but uncontrolled development pattern from birth to maturity and finally to old age and decline. At each stage the destination appeals to a different psychographic group of travellers, who determine the destination's character and success. According by Plog (2001) destinations can be placed on the psychographic curve based on the types of people who visit.

McKercher (2005) however, "argues that destinations serve many markets simultaneously. Each market evolves through its own life cycle at different rates, with some in the new stage while other may be in the expanding, stable or tired stages". Therefore, he suggested that if a destination can exist simultaneously at multiple points along its life cycle continuum, depending on the perspective of different markets visiting it, then it cannot be said any destination is at a definite life cycle stage.

Depending upon which school of thought one accepts, it could be argued that shocks to a destination's tourism industry (natural or man-made) could be associated with different magnitudes of impact and varying recovery periods. For instance, if a terrorist attack occurred during the early (allocentric) stages of Plog's Model would the rapid growth being experienced provide a momentum that would carry tourism back onto a rapid road to recovery? On the other hand, could it be that the tourism destination at this stage is so infant and precarious that the effects of the event would magnify its impact? Does the maturity of the destination necessarily imply robustness? The recovery period associated with such attacks is examined later on in this thesis when case studies are used to consider the recovery period following terrorist attacks in different types of destinations.

Aktas et al. in Theobold (2005) argues that the distinction between different types of crisis is not always clear cut. The 9/11 attacks on the United States, for example, were extraordinary in the country's recent history and can be considered as a one-time event. But the impacts on tourism industry were considerable. When the 9/11 terrorist attacks happened, tourism growth had already experienced a slow down. The magnitude of the decrease in tourism activity was partly because of the deterioration in economic conditions affecting chief North American, European and Asian economies at the same time with worldwide economic growth dropping to 2.5 per cent in 2001, down from 4.7 per cent in 2000, with some economies even slipping into an economic slump for part of the year. The terrorist attacks of 9/11 severely provoked the situation and as a result, for the first time since 1982 (the time of the second oil crisis, martial law in Poland, the Falklands war and the conflict between Israel and Lebanon) the worldwide number of international tourist arrivals showed an absolute decrease (UNWTO, 2002). However, the later terrorist attacks on Madrid on 11.4.2004 or London attacks (2005) had less of an impact on the market.

Conclusion

The primary focus of this chapter was first, to introduce the tourism system, and secondly to examine the impact of political impediments on tourism motivation and to start to draw attention to the factors that influence perceived travel risk. The emerging global economy and communications networks, of which the internationalization of

tourism is an integral part, make tourism increasingly vulnerable to the effects of political instability and political violence. When tourism ceases to be agreeable due to real or perceived risks, tourists implement their freedom and power to avoid risky situations or destinations (Hall, 1994; Wahab, 1996; Wall, 1996, p145; Wahab et al. (1996); Pizam 1999, Sonmez 1999; Sonmez et al. (1999); Cooper, 2001; Aktas et al. in Theobold 2005).

Some believe that while natural disasters can obstruct the flow of tourism, terrorism risk tends to frighten the travelling public more severely. Violent protest, social unrest, civil war, terrorist actions, the perceived violations of human rights, or even the mere threat of these activities can all serve to cause tourists to alter their travel behaviours Hall(1994).

Protection from the ramifications of terrorism can occur at different levels. As a form of protective behaviour, travellers can alter their destination choices; modify their travel behaviour; or if they decide to continue with their travel plans, acquire information on terrorism, political turmoil, heavy crime, and health risks (Norton 1987; Reeves 1987; Chandler 1991; Englander 1991; Fedarko 1993; Fletcher 1993; Hagerty 1993; Pelton and Aral 1995). Those who decide to travel despite risks are advised by various sources (i.e., travel magazines, government advisories, Internet) to avoid displays of wealth, to keep a low profile, to vary daily routines during lengthy business trips, and to fly economy class-since hijackers are known to prefer first class to establish their temporary headquarters (D'Amore and Anuza 1986). If the potential costs of travel appear to be more important than the benefits, the traveller can decide to stay home. Unfortunately, for destinations overwhelmed with terrorism or political disorder the solution is far more complex. Attacks on tourists and actual or perceived political instability could create negative tourist images of a destination, which may take years to overcome, and as such this provides a different landscape of risk to that associated with natural disasters.

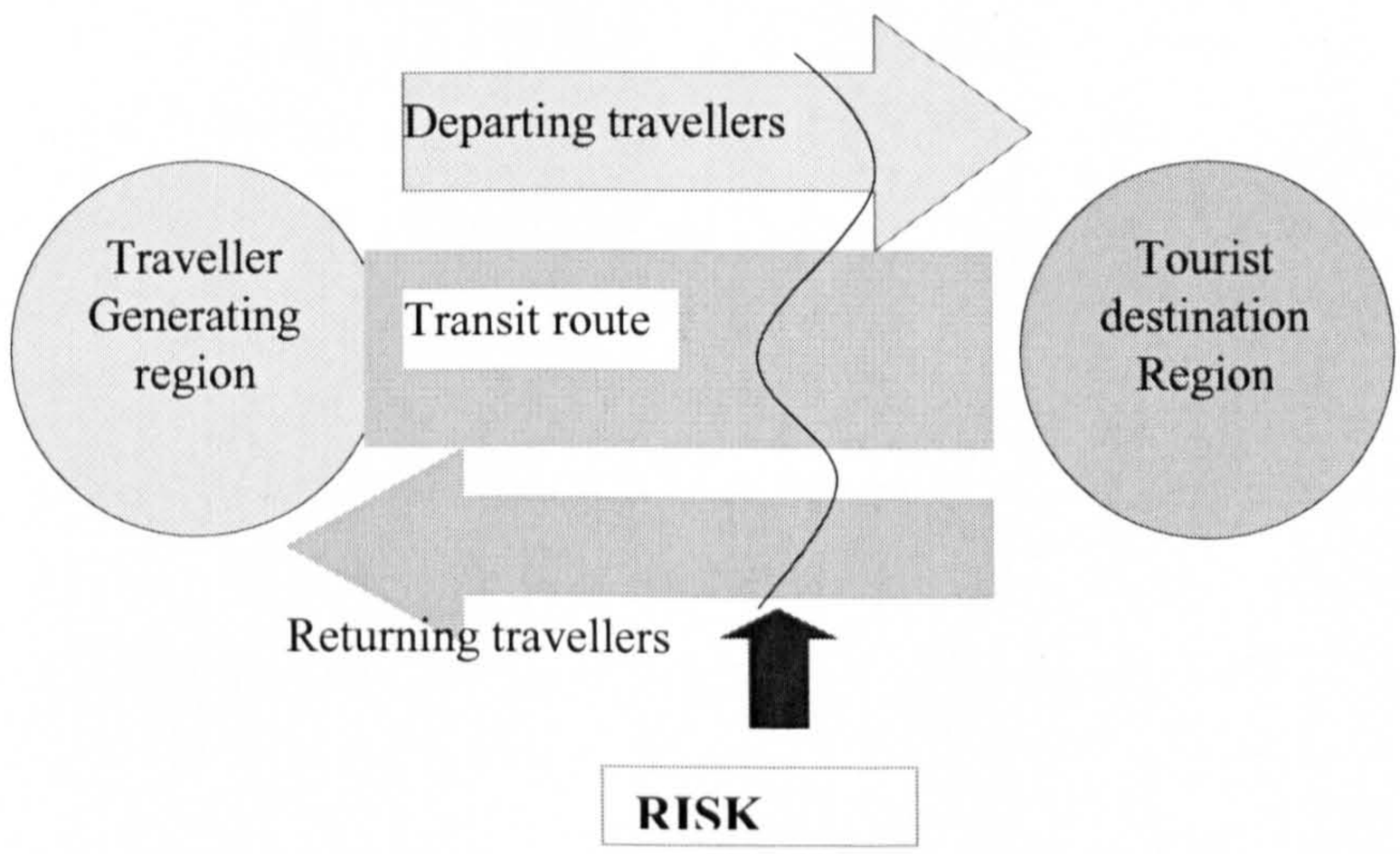
However, the repercussions of a tourism crisis are likely to damage all destinations, the period of recovery can vary for each and the impact is dependent on many factors. This is very important, particularly in developing countries, where the lack of capital and infrastructure makes it more difficult to cope with difficulties. Although it seems

that potential tourists have a relatively short memory, the implications for investment in the industry may be a different matter.

The next two chapters investigate the impact of acts of terrorism in recent years. Examining cases studies both from developing and developed countries in detail mainly to identify the impact on tourism arrivals and revenue as result of such attacks and the recovery periods and the response that has been taken by destinations to restore tourism confidence.

In terms of the effect of travel-related risk on Leiper's system of tourism, Figure 2-7 reproduces Leiper's diagram with a fracture that separates the originating country from the destination. The fracture can be seen as a hurdle or threshold limit imposed by travel-related risks. The greater the level of risk, the greater the barrier to travel and at some level of risk travellers will find it simply too high to scale and they will seek alternative destinations where the passage is less risky. The precise level at which the threshold level of risk will stop travel will depend upon the region and its image, the country and its image, the level of risk averseness of the traveller (which may also in part be determined by the culture/country from which they originate) and the nature of the risks. These are all aspects that will be explored in the following chapters.

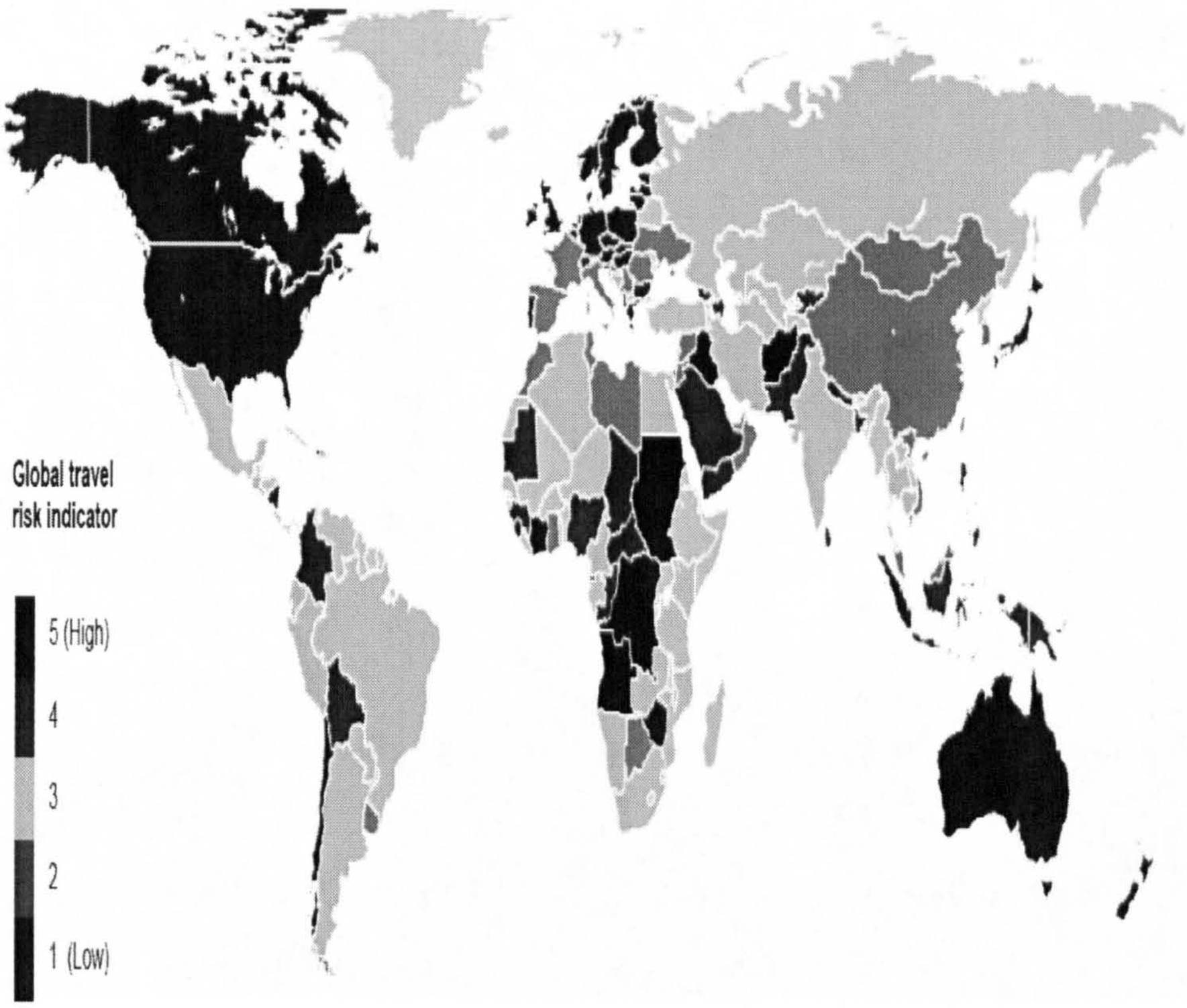
Figure 2-7 Leiper's Tourism System with Risk introduced.



When tourists make their travel decisions one aspect of that decision will focus on travel risk. In some tourists this may be considered to be a positive aspect but for the majority the exposure to risk will be considered a negative element. There are many types of risks to which tourists may be exposed. Some may be product related in the sense that often for first- time visitors the purchase is made on a bit of knowledge and a lot of faith and it may transpire that they do not enjoy the result of their decision. There are risks in relation to finance in that the traveller may find that the cost of their travel far exceeds their original estimates. There are also travel risks relating to physical harm, through ill-health, natural disasters, crime or political unrest and terrorism. Travellers will be informed of various risks through media exposure or from travel advisories issued by their governments. Such information is, again, partial in that often only the more spectacular or major incidents are brought to the media's attention.

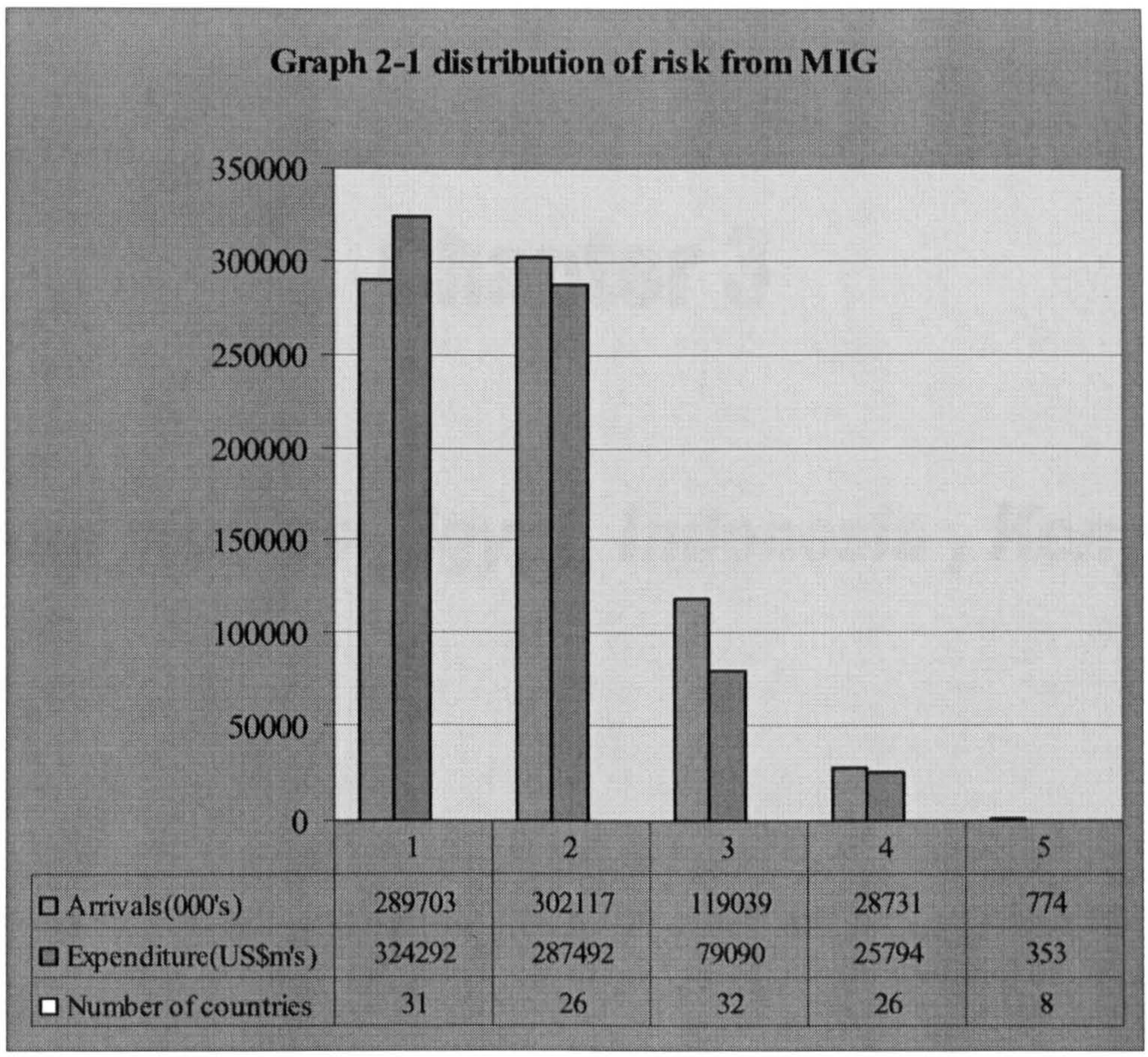
This research examines a variety of these risks, although it does focus in a large part on the risks associated with acts of terrorism or political unrest. Map 2-1 shows the travel risks around the world as seen through the analyses of Merchant International Group Ltd. The map is based upon an analysis of a variety of risks relating to political unrest, terrorist acts, natural disasters, contagion and violent crime. Although it represents only a subset of the areas examined in this research, it does demonstrate the enormity of travel risk on a global scale from a geographical point of view.

Map 2-1 Global Risk Indicator



Source adapted from: Merchant International Group Ltd available

However, if one looks at the level of travel risk from the point of view of tourism flows, it paints a very different picture. Graph 2-1 shows the volume of tourism activity, in terms of arrivals and expenditure in relation to the level of travel risk. It can be seen that more than 80% of arrivals are in countries where the travel risk is relatively low, scoring either 1 or 2 and that 85% of tourism expenditure is similarly distributed. Those countries that are subject to high levels of travel risk (4 or 5) have little in the way of tourism flows from a global perspective. To some extent this may be expected since areas that are considered to be risky are unlikely to attract large numbers of visitors and their associated spend. On the other hand, it is difficult for countries with this perceived level of risk to carry tourism through its development inertia which is worrying, particularly if the perceptions are misplaced.



This research will examine the literature, implement and analyse a survey of travellers and confirm the findings of that primary research using a Delphi Panel of tourism experts. It can be seen from Graph 2-1 that much of the Middle East, Africa and South America is considered to be subject to high or very high travel risks and an attempt is made here, using selected case studies, to determine the effects of risk on tourism flows and how governments respond.

Chapter 3

Case studies (Egypt, Indonesia , Kenya)

Introduction

The previous chapter explored the place of risk in the tourism system and in particular, the risk associated with political unrest and terrorism. This chapter takes the issue forward to look at the effect of political and terrorist incidents on tourism activity in some selected developing countries. In this way it will be possible to look at the variety of forms that such acts have taken and the impacts of events on the countries that are subjected to these events. The following chapter examines three case study countries from high income countries (USA, UK and Spain) in order to examine the effects of terrorist attacks and recovery times in those countries.

3.1 The case study selection

A variety of approaches were considered to find the most appropriate countries to be included as case studies. Countries were categorised by GDP levels, then by the proportion of GDP attributable to tourism receipts and finally by whether or not they had experienced terrorist attacks or political upheavals over recent times. None of these filters worked perfectly to provide a good distribution of case study countries, causing the researcher to consider exception rules for each filter. However, after much deliberation it was decided to take a cruder but, hopefully, more informative selection of countries from the developing world. The case study countries chosen are Egypt, Indonesia and Kenya. The reason for the inclusion of these three countries is that they all fall into the category of low to lower-middle income countries, all of them receive significant tourism receipts in relation to GDP and all of them have been subjected to terrorist attacks of varying magnitude. Additionally, there is one country from Africa, one from the Middle East and from South Asia Pacific region. This provides a good geographical and cultural spread with respect to developing countries.

Indonesia was subject to a series of incidents, which included one of the deadliest attacks directed at tourists in modern history (Beirman, 2003). Furthermore, Bali is Indonesia's principal tourist destination and although tourism only accounts for 3.5 percent of GDP in Indonesia, it is a major provider for the local economy of Bali. Egypt has been chosen because, for five consecutive years in the 1990s, it struggled

with *al-Gema al-Islam*iya, a terrorist group that targeted and killed many tourists. Egypt has also been selected as a case study because of the uniqueness and therefore the attraction pull of its heritage (Essner and Laurance, 2003). From the Pyramids of Giza to the Aswan Dam, Egypt is a well-known beneficiary of international tourism. Furthermore, Egypt is an Arab country that has had difficulties in managing a fundamental Islamic undercurrent that uses terrorism as a tool to intimidate the state to further a cause. Kenya has been selected as a case study because although the target of terrorist activities was deliberately tourists, the acts were aimed at a narrow spectrum of tourists, namely the Jewish tourism super infrastructure and Israeli tourists.

3.2 Terrorism and Developing Countries

According to the World Tourism Organisation (UNWTO), tourism is the main source of income for almost 40% of the world's countries (Quinn, 2003). It is most important in the developing world where economic growth is most complicated and necessary (Sinclair and Tsegaye, 1991). It is also apparent that in many areas, where the traditional economic base is barely capable of satisfying basic life, tourism could bring new opportunities of income and economic diversification (Wilson, 1994). However, often the lack of political stability i.e. War, terrorism and other man-made issues prevent tourism from fulfilling its potential.

Terrorism as a tactic for attempting to influence political issues and demands seems unlikely to disappear in the foreseeable future (Weinberg, 2005). A series of terrorist attacks in recent years have left no doubt that terrorism has become an ever-increasing threat and that the terror threat is not confined to one area, it is global in nature (Cameron, 2005). The depressing effect of terrorism on economic growth and on the tourism industry in particular, appears to be most significant for developing countries, where the lack of diversity in their economic activities and planning compounds the problems created.

In the previous chapter, the literature was reviewed in an attempt to understand better the impact of political tension, war and terrorism on the tourism industry and tourist behaviour. This chapter analyses the interface of destinations' coping mechanisms

and tourism, with a particular focus on the process within developing countries. The case study countries are compared with respect to their stage of tourism development, the implications of the crisis and the responses that were made to it.

There are 208 (World Bank, 2006) countries in the world, nearly all of which benefit to some extent from tourism. However, not all of the countries benefit equally. Two of the case study selections were from a sample of countries whose receipts from tourism were in excess of one billion US dollars in 2004 (Egypt and Indonesia) which according to definition of UNWTO indicator is expenditures of international inbound visitors including payments made to national carriers for international transport. This indicator also includes any other prepayments made for goods/services received in the destination country (Essner, 2003). The final developing country used as a case study, Kenya, fell marginally short of this threshold (with tourism receipts amounting to 0.8 US$ m). Table 3-1 puts these three countries into context, showing tourism activity, in terms of receipts, for 50 countries. It can be seen that these 50 countries, in terms of tourism receipts, are a disparate group from the point of view of the magnitude of the receipts (ranging from 66.5 US $m to 1.9 US $m but extended to 0.8 US $m to include Kenya).

Table 3-1 Top 50 destinations plus Kenya (US$ million)

Rank	Countries	2002	2003	2004	Rank	Countries	2002	2003	2004
1	USA	82.4	71.9	66.5	26	**Egypt**	3.7	4.5	6.1
2	Spain	31.7	39.6	45.2	27	Poland	4.2	4.0	5.8
3	France	32.3	36.5	40.8	28	Denmark	4.7	4.2	5.6
4	Italy	26.6	31.2	35.6	29	R.O. Korea	5.9	5.3	5.6
5	Germany	19.2	23.1	27.6	30	South Africa	2.9	5.1	5.6
6	UK	20.3	22.6	27.2	31	Russia	4.1	4.5	5.2
7	China	20.3	17.4	25.7	32	Singapore	4.4	3.7	5.0
8	Turkey	11.9	13.2	15.8	33	New Zealand	3.0	3.9	4.9
9	Austria	11.2	13.9	15.3	34	**Indonesia**	5.2	4.0	4.7
10	Australia	8.5	10.3	12.9	35	India	2.9	3.5	4.7
11	Greece	9.7	10.7	12.8	36	Ireland	3.0	3.8	4.2
12	Japan	3.4	8.8	11.2	37	Czech republic	2.9	3.5	4.1
13	Switzerland	7.8	9.1	10.4	38	Taiwan	4.5	2.9	4.0
14	Netherlands	7.7	9.1	10.2	39	Hungary	3.7	4.0	4.0
15	Thailand	7.9	7.8	10.0	40	Morocco	2.6	3.2	3.9
16	Canada	10.8	10.8	9.7	41	Egypt	4.3	3.8	3.7
17	Hong kong	7.5	7.1	9.0	42	Luxemburg	2.4	2.9	3.6
18	Belgium	6.9	8.1	9.1	43	Norway	2.1	2.6	3.0
19	Mexico	8.3	8.4	8.9	44	Israel	2/0	2.0	2.3
20	Malaysia	7.1	5.9	8.1	45	Syria	1.4	1.4	2.2
21	Portugal	5.7	6.5	7.7	46	Bulgaria	1.1	1.6	2.1
22	Macao	4.2	5.1	7.4	47	Cyprus	1.8	1.9	2.0
23	Croatia	3.8	6.3	7.0	48	Philippine	1.5	1.5	2.0
24	Saudi Arabia	5.7	5.6	6.5	49	Finland	1.5	1.8	2.0
25	Sweden	4.0	5.2	6.1	50	Tunisia	1.5	1.5	1.9
					51	**Kenya**	0.51	0.61	0.80

Source: Adapted from UNWTO (2006)

However, to set tourism activity further into context, it is not only the volume of tourism receipts that needs to be examined, it is the proportion of GDP attributable to those receipts as this gives a crude indication of the significance of tourism to those countries. By looking at those countries that are highly dependent to those that are not highly dependent upon tourism receipts (using a percentage of GDP of 3.0 % as a threshold) the list of 50 countries shown in Table 3-1 can be reduced to only 28 (see table 3-2).

Table 3-2 List of countries in which international tourism receipts account for 3 percent or greater of GDP

Rank	country	%	Rank	country	%
1	Macao	40.2	15	Thailand	5.5
2	Bahamas	33.2	16	Spain	5.4
3	Cyprus	20.3	17	Morocco	5.3
4	Jamaica	17.0	18	Hong Kong	4.5
5	Dom. Rep	14.6	19	Malaysia	4.5
6	Croatia	12.5	20	Portugal	4.5
7	Syria	8.6	21	**Egypt**	7.0
8	Tunisia	7.1	22	**Kenya**	3.2
9	Singapore	7.3	24	Poland	3.9
10	Greece	7.3	25	new Zealand	3.7
11	Hungary	7.1	26	Porto Rico	3.7
12	Costa Rica	6.3	26	Ireland	3.6
13	Austria	6.0	27	**Indonesia**	3.5
14	Czech Rep.	5.5	28	Philippines	3.3

Source: adapted from UNWTO and World Bank (2007)

Table 3-2 shows that the case study countries fall into last 8 in terms of their ranking with respect to receipts as a percentage of GDP.

Finally, since, in part, the purpose of this study is to examine the impact and responses of destinations with respect to acts of terrorism, the selection also has to consider those countries that were subject to terrorist attacks. This criterion reduces the number of developing countries in the framework down to a list of just seven that could be eligible for inclusion in this study (see table 3-3). While each case contains unique characteristics, there are a number of common elements that apply. All of the events resulted in a significant downturn in tourism numbers to the destination and created a climate of fear and concern about its overall safety and viability (Biermann, 2003). In all cases, a marketing strategy was required to restore confidence in the destination.

Table 3-3 The case studies candidates.

Country	Year	Terrorism attacks
Egypt	1992-1197	Several terrorist attacks against tourists including that at Luxor
Philippine	2000	Explosions in Manila targeting a train, a bus, the airport, a park near the U.S. Embassy and a gas station, killing 22 people
Tunisia	2002	The bombing of an historic Tunisian synagogue on the resort island of Djerba with a gas truck, kills 21 people, mostly German tourists.
Indonesia	2002-2004	Three deadly bomb attack including the Bali bombings (2002) J.W. Marriott (2003) and the Jakarta embassy bombing (2004)
Morocco	2003	Suicide bomb attack in Morocco's largest city, Casablanca, targeted a Jewish Community Centre, a Spanish restaurant and social club, a hotel and the Belgian consulate which killed at least 41 people and injured a further 100.
Kenya	2002	Suicide attack in Paradises Hotel in Mombassa which Killed 15 people
Turkey	2003	Bomb attacks on the British consulate and the HSBC bank headquarters in Istanbul on 20.11.03, which left at least 27 dead and up to 400 injured. The explosions followed the suicide bomb attacks against two synagogues in Istanbul that killed 25 people 5 days earlier.

Source: adapted from fox news and BBC news

One of the main economic criterions for classifying a country is Gross Domestic Product. Each economy is classified as low income, middle income (subdivided into lower and upper middle), or high income. Other measures based on geographic region, exports and levels of external debt are used (see table 3-4). Economies meeting a certain threshold (either low-income or middle income) are generally referred to as developing countries (Essner and Laurance, 2003). Adejuwon (2000) defined a developing country as a country with a growing economy whose general development is not yet mature. It is neither a potential industrialized country nor a classified manufacturing country. According to the definition of the World Bank, developing countries are low and middle-income countries in which most people have a lower standard of living with access to fewer goods and services than do most

people in high-income countries. However, this is not an exact science and there are many exceptions to the rule, including, for example, the oil-exporting countries where the level of GDP per capita may be extraordinarily high but the level of economic development is very narrow and limited.

Table 3-4 Case studies data profile

	Years	Kenya	Egypt	Indonesia
GDP	2004	16.1b	78.8 b	5.1b
	2005	18.00b	89.3 b	5.6b
Exports	2004	26.2	28.9b	31.3b
	2005	24.7	31.7b	37.7b
situation		L.I	L.M/L.I*	L.M/S.I**

Source: Adapted World Bank (2007)

* Lower middle income, less indebted.

**Lower middle income, severely indebted.

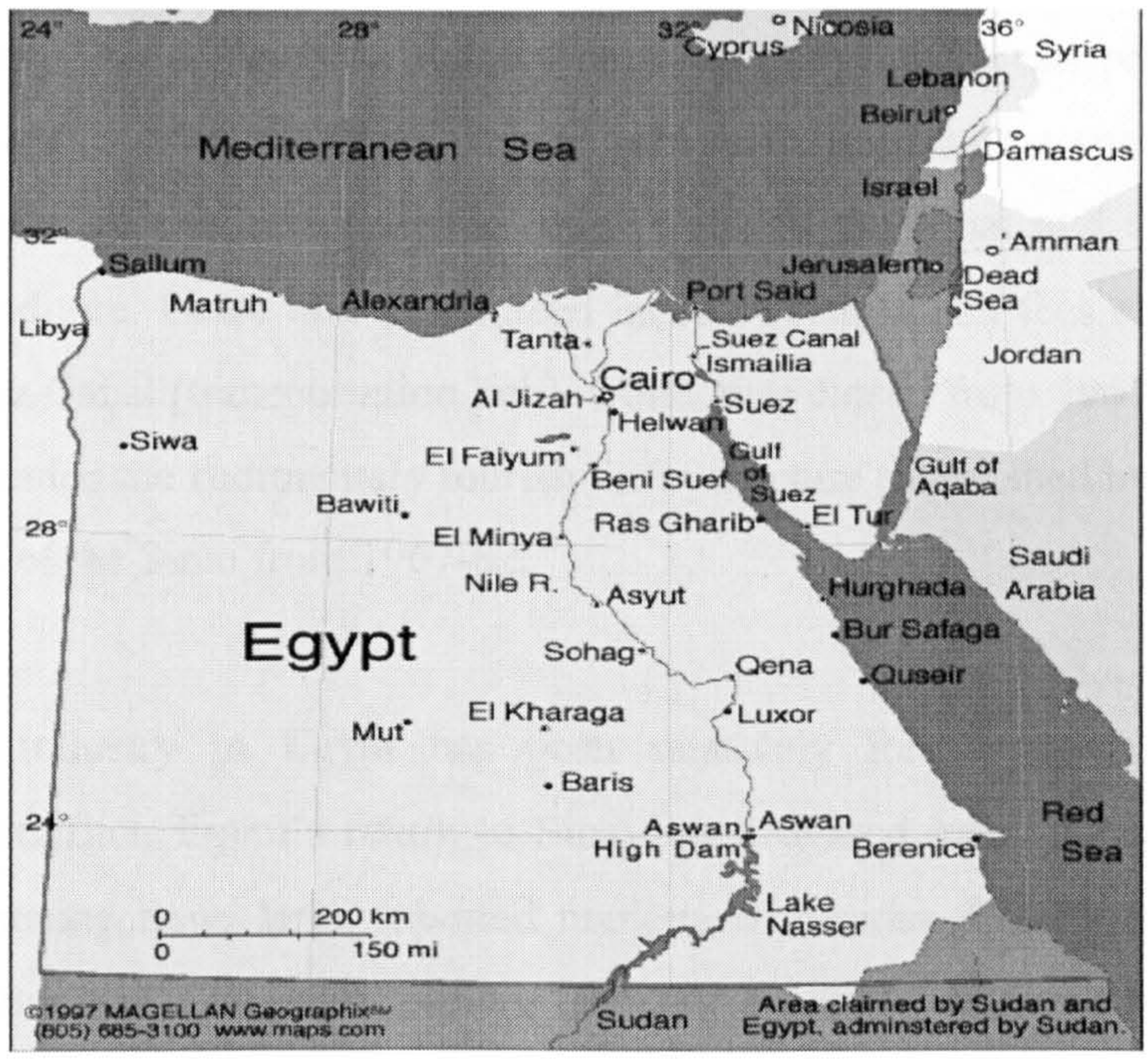
According to research conducted by the WTTC (2004) the variables that are used to define or characterise a crisis event include:

- Consumer confidence - in respect to international arrivals, personal travel and tourism, and business travel;
- Timing - in respect to tourism seasonally;
- Shock factor - in respect to intensity/duration of the event;
- Geographic Spread – localised, national, regional or global;
- Infrastructure needs - in respect to damage and pace of rebuilding
- Government Response – with respect to recovery programmes, marketing and promotion.

3.3 Egypt: brief background

Egypt, although often considered to be Middle East, is located in Northern Africa, bordering the Mediterranean Sea, between Libya and the Gaza Strip, and the Red Sea north of Sudan, and includes the Asian Sinai Peninsula (CIA 2005, see map 3-1). Egypt is part of the Mediterranean basin, the world's top destination area, which attracts one out of every three tourists travelling in the world (UNWTO ,2005).

Map 3-1 Egypt.



Source: adapted from http://www.factmonster.com/atlas/country/egypt.html

Tourism is the country's second biggest source of income after the revenue received from the Suez Canal (BBC, 23.07.05) and accounted for 7% of total GDP in 2004. Egypt is the second most popular destination in the Middle East after Saudi Arabia. However, in terms of leisure tourism it ranks first. Even globally Egypt is a significant tourism destination, ranking 26 out of 190 countries in the world for tourism receipts in 2004 (see table 3-1). The main attraction for tourists to Egypt are the site of ancient Egypt, Cairo and its environs, Luxor, Karnak, Abu Simbel, temples and tombs along the Nile River and the Mediterranean port city of Alexandria. However, the Egyptian tourism industry has actively promoted other destinations within Egypt, including Hurghada on the Red Sea, the Sinai Peninsula and parts of the western desert. The completion of Israel's removal from Sinai in 1982 led to considerable private and government tourist investment, which facilitated the development and establishment of several high-quality tourism resorts in the Sinai, which are popular among tourists from Europe and neighbouring Israel (Beirman, 2003). Egypt also has started to combine a series of proposals aimed at the water sports and "sun and sea" markets,

based on its rich and diverse natural heritage, which is ideal for such kind of products (UNWTO, 2005).

The 1979 Camp David Peace Agreement between Egypt and Israel presented many economic benefits to Egypt. These include self–sufficiency with respect to oil since most of Egypt's oil production comes from wells in the Sinai and a reduction in military expenditure. Peace also guaranteed income from transit fees charged for the use of the Suez Canal (transportation hub), which was closed from 1967 to 1975. The Egyptian expanded the rudimentary tourism infrastructure established by Israel during its occupation of the Sinai from 1967-82.

The tourism industry in Egypt has been relatively free from the impacts of international conflict. Egypt's return to Sinai has provided many economic benefits for Egypt, opening new, large inbound markets of curious Israelis followed by a substantial growth in European tourism (Beirmann, 2003), while at the same time Egypt has started to receive funds from the United States.

These policies were broadly unpopular with Egyptians (Middle East Desk, 2007) and many Arab countries, which opposed the Egyptian–Israel accord, subjected Egypt to political isolation. Consequently, tourism from the Arab world slumped during this period. However, following the assassination of President Anwar Sadat in October 1981 and his replacement by the more politically cautious Hosni Mobarak, Egypt was, again, gradually accepted within the Arab world. Domestically, the CDPA between Egypt and Israel remained a traditional source of opposition for many regimes both within and outside Egypt. The Muslim brotherhood, which had long believed Egypt to be a state that observed Islamic law, began to reassert itself following the agreement. According to Essner (2003) in the late 1970s the al-*gema'a al-islamiya* began inciting revolution and intimidating the state into adopting *shari'a* law, a fundamentalist form of Islam. *Al-gema'a al-islamiya* targeted government officials, Coptic Christians, policemen, officers from the State Security Intelligence and tourists. Beirman (2003) argues that a significant portion of its funding has come from foreign governments, including Iran. The researcher believes however, if the Beirmann (2003) assumption

is right it had to be after the revolution (1979) and considering that the *Al-gema'a al-islamiya* was established years before the Iranian revolution (1970) this seems unlikely.

The Iraqi invasion of Kuwait in August 1990, and the subsequent Gulf War in January and February of 1991 had a negative impact on tourism for all countries in the Eastern Mediterranean and Middle East. Egypt who had long supported the Iraqi government during the war between Iran and Iraq, committed a substantial military force in support of the U.S.A led coalition, which expelled Iraqi forces from Kuwait. It was the largest Arab force in the coalition, which included Syria, the Gulf States, Saudi Arabia and Morocco. However, there was some vocal Islamic opposition to Egypt's Gulf War involvement (Beirmann, 2003).

Twenty-first century Egypt has made considerable progress in marketing a more diverse image of the destination. The Egyptian Tourist Authority, while recognising the overriding attraction of 'Ancient Egypt', has sought to market *alternative Egypt* in an attempt to appeal to niche markets, including conferences and conventions, eco-tourists, war veterans and their descendants, among others. The decentralisation of infrastructure and tourist attractions spreads the economic benefit of tourism throughout the country.

3.3.1 Attacks against tourists 1992-1997

Egypt, for five consecutive years in the 1990s, struggled with *al-Gema al-Islam*iya, a terrorist group that targeted tourists in order to decimate the tourism industry and cripple the country's economy (See Table 3-5). According to Essner (2003), the group demanded that the Egyptian government introduce Sharia law, sever diplomatic relations with Israel, convince the U.S to free spiritual leader Sheikh Omar Abd al Rahman, free other Islamist leaders and end the trials by military courts.

Table 3-5 The number of attacks against tourists 1992-1997

Attacks by *al-Gema 'al –islamiya* against tourist from 1992 to 1997	
October 1992	British nurse killed in bus attack near Cairo
February 1992	Two tourists killed outside a Cairo hotel (one French, one US)
October 1993	One US and one French tourists killed outside a Cairo hotel
March 1994	One German tourist killed on a Nile boat
September 1995	Two Germans and two Egyptians killed in Red Sea resort city of Hurghada
October 1995	One British killed and one wounded with one Egyptian killed and five wounded in an attack on a tourist mini-van in the Nile Valley
April 1996	Eighteen Greek tourists killed and sixteen wounded in an attack on a tourist Coach near the Pyramids at Gaza.(it is believed the Greeks were incorrectly assumed by their attackers to have been Israelis)
September 1997	Ten German tourists killed in an attack outside the Egyptian Museum in Cairo
November 1997	Fifty-eight tourists massacred in the area of the Luxor Temple. Victims included: French, Swiss, British and Japanese nationals

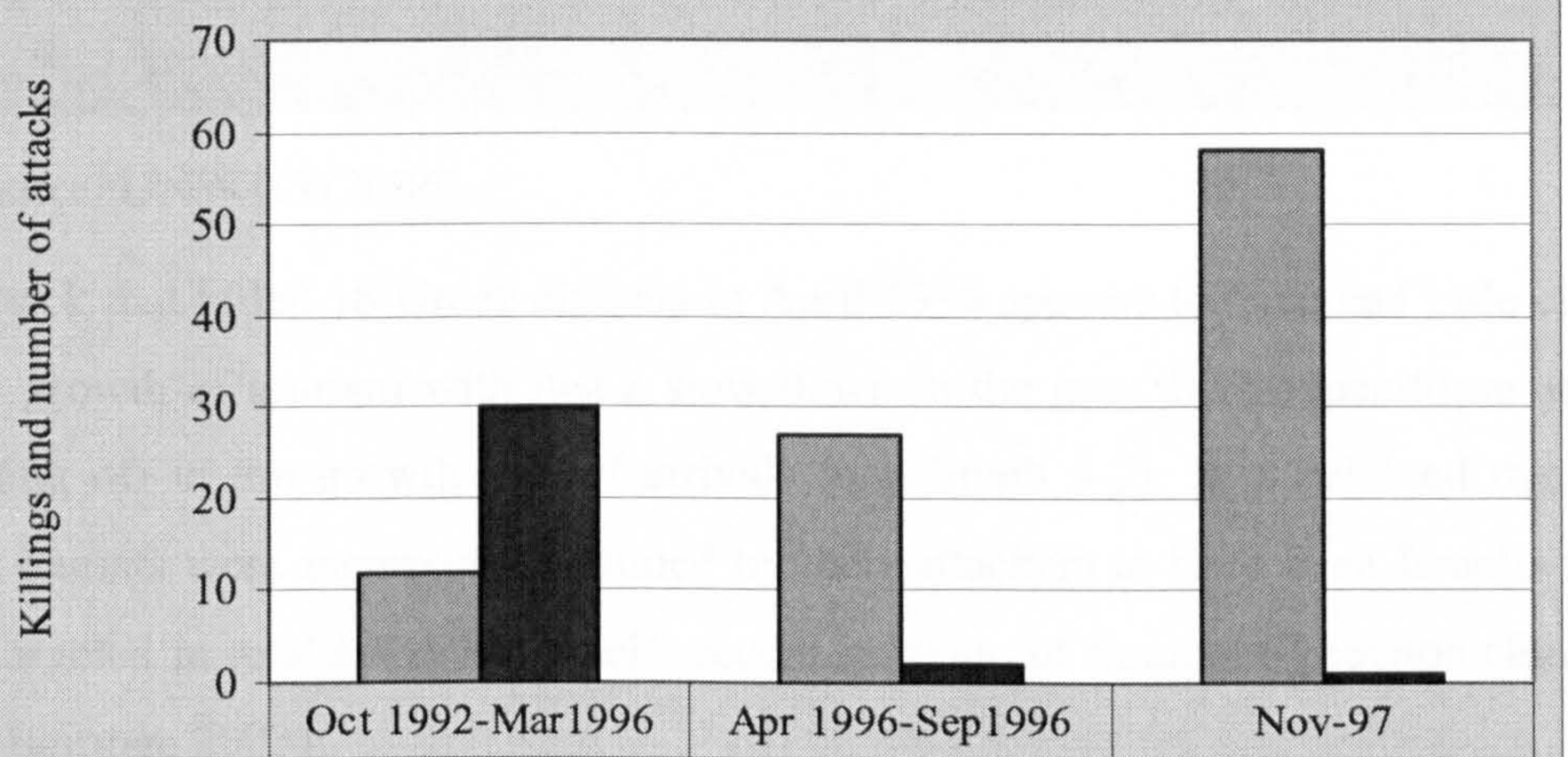
Source: adapted from Beirman (2003)

Beirman (2003) believes many Islamists resented what they saw as the culturally intrusive influence of mass tourism on Egypt's society in general, and on Islamic goodness and performance in particular. The Islamists were aware that tourism represented a major source of foreign exchange earnings for Egypt and for the Egyptian government. Thus, undermining the tourism industry would lead to a decline in Egypt's existing low standard of living, and fuel social and political discontent, which might lead to the overthrow of the Egyptian political leadership. Finally, members of al–islamiyya and Jihad believed that the economic benefits which tourism brought to Egypt were monopolised by a small Egyptian elite and did not filter down to the average person.

3.3.2 Impact of the attacks

The Luxor massacre was the last major Islamic attack against tourists in Egypt during the twentieth century and resulted in the death of 58 international tourists – Egypt's most deadliest attacks. The numbers of people killed exceeded those who died during the whole two–decade history of *al-Gema 'al –islamiya* (Essner, 2003). The attacks achieved a great deal of notoriety through the extensive media coverage that was afforded it. However, the attacks were also subject to worldwide condemnation, even from Islamic States like Iran, while the thousands of Egyptian people who were dependent on tourism for their livelihoods (especially in Luxor) were deprived of their incomes. Graph 3-1 shows the inverse relationship between the number of attacks and the number of resulting deaths during the 1990s.

Graph 3-1 Comparision of Effectivness of Al-Gama al-Islamya attacks

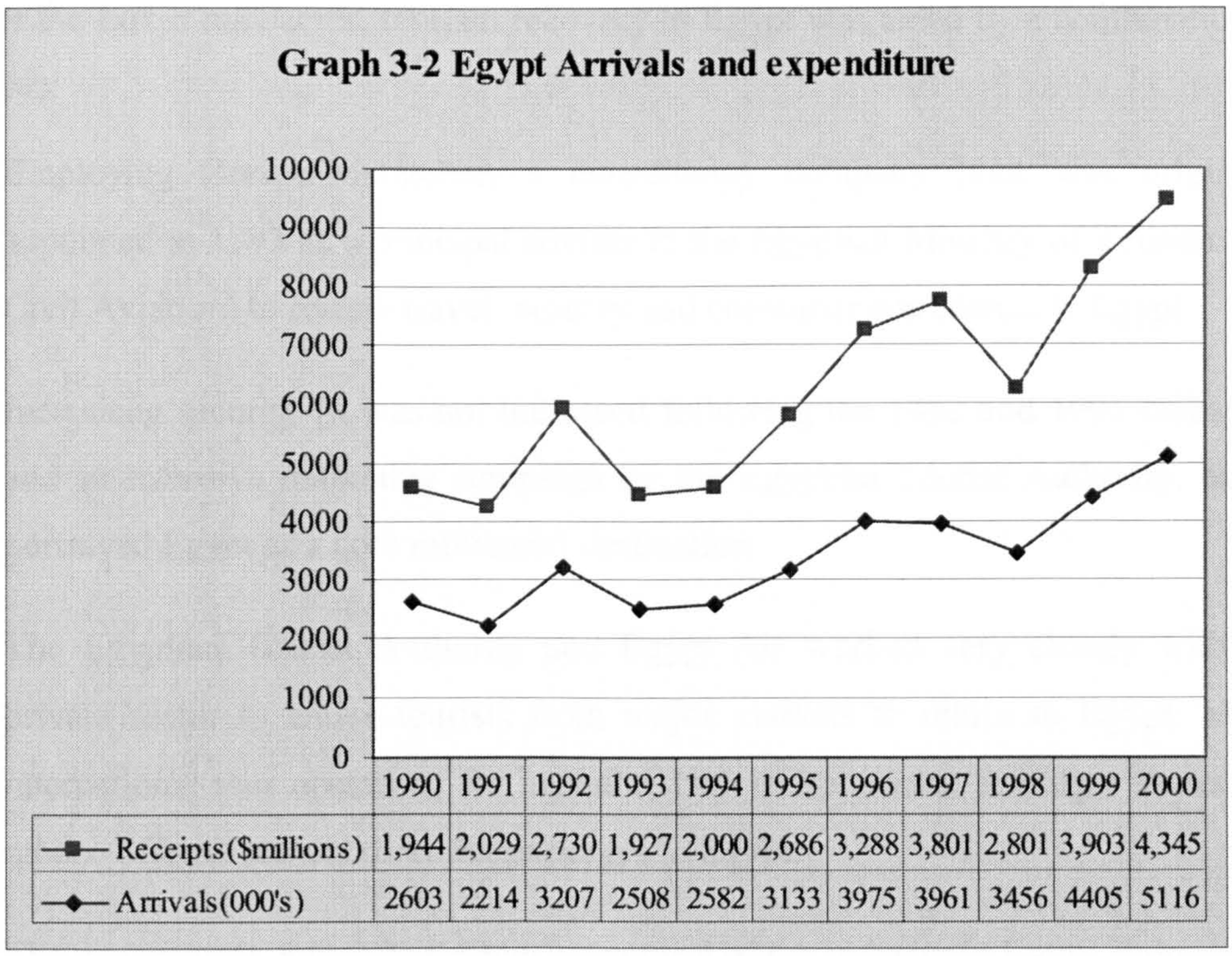


	Oct 1992-Mar1996	Apr 1996-Sep1996	Nov-97
Killing	12	27	58
Attack	30	2	1

Source: adapted from Essner 2003

The impact of the attacks, however, seems to be have been proportionately less in 1997 compared with the effect in 1992 albeit with a much higher base line. Graph 3-2 shows a decline of about 22% in 1993 over the 1992 values whereas the drop in 1998 over the 1997 figures was 12.8%. Furthermore, tourism expenditure decreased by

29.41% on 1993 over the 1992 attack where it was slightly lower at 26% in 1998 over the previous year .



Source: UNWTO (2006)

The attack that killed 18 Greek citizens in April 1996 appears to have had little effect on the growth of tourism with just a slow down in the growth of expenditure and a flattening off in the growth rate of arrivals (see Graph 3-2). It is believed that the Greek tourists were incorrectly assumed by their attackers to have been Israelis who were targeted in retaliation for Israel's recent invasion of Southern Lebanon (Essner, 2003; Beirman 2003).

After the attacks in 1992 the number of arrivals did not recapture the volume that had existed prior to the attacks for 4 years. However, following the much more dramatic attack at Luxor in 1997, the industry seemed to rebound more quickly such that by 1999 real tourism receipts had increased 40% over the previous year and tourism receipts reached historical highs of $3.9 billion in 1999 and $4.3 billion in 2000. It is interesting to explore why such differences in the speed of recovery were experienced.

3.3.3 The response to the Luxor crisis

After the Luxor massacres, tourism recovery to Egypt was aided by a combination of factors:

- Employing Burson-Marsteller, a consultancy company (that was originally appointed in 1993 as a principal adviser to the Egyptian Ministry of Tourism and Civil Aviation) to restore travel industry and consumer confidence in Egypt
- Increasing security (it was not increased following the 1992 and 1994 incidents) and an intensive marketing campaign by the Egyptian Tourist Authority, which portrayed Egypt as a core millennial destination
- The Egyptian Tourist Authority and Egypt Air worked very closely with the private sector to entice tourists from major markets to return to Egypt. Major international tour operators, for instance, Insight Vacations, Trafalgar Tours and others, offered heavily discount packages to Egypt.
- The government, which has extensive control of the industry in Egypt, reduced the prices to induce tourists to return.

A factor that contributed to the high death toll of the Luxor massacre in November 1997 was the fact that a lone elderly guard was assigned to protect one of Egypt's most visited tourists' sites. After Luxor, the Egyptian government massively increased security details assigned to all major tourist sites and this was accompanied by a relentless crackdown on Islamic groups. However, in October 2004 there was another attack against the tourists in Egypt, at the resort of Taba, which is popular with Israelis (BBC, 08, 09, 04). This left more than 35 people dead, and this was subsequently followed a year later by the worst atrocity against tourists to date at the heart of the Egyptian tourism industry which resulted in the deaths of 83 people. The Red Sea resort of Sharm el-sheikh is popular among tourists and had been claimed to be the most secure place in Egypt. The attack did not seem to discriminate between tourists of different nationalities.

Many western countries issued travel advisories warning their citizens of the dangers associated with travel to Egypt and the possibility of further attacks. In most cases, these advisories were quickly cancelled once the Egyptian government could

demonstrate that remedial measures had been taken. After the Luxor attacks, the Egyptian tourism authorities treated the advisories very seriously and were anxious to encourage their early revocation. The Egyptian Tourist authority went to considerable lengths to invite foreign diplomats to inspect the upgraded security regime in tourist centres, which included enlarged police contingents and electronic surveillance at entry points. These actions went some way towards alleviating the high risk perceptions that had been instilled as a result of the attacks.

In long-haul tourist originating countries, such as the USA, Canada, Japan and Australia, Egypt began to experiment in joint marketing exercises in 1995 and has continued the joint marketing of Israel, Jordan and the Palestinian authority which is a feature of marketing Egypt to the travel industry in the USA and Canada and Japan.

According to Beirman (2003), one marketing factor which hastened the recovery of the Egyptian tourism industry after the Luxor massacre (1997), which was not a possibility after the 1992 and 1994 incidents, was the prospect of a millennial tourism influx. Egypt was able to promote tourism on two levels. First, it had a legitimate stake in promoting itself as a pilgrimage destination to Christians commemorating Christianity's bi–millennium based on belief that Jesus and his family spent three years in Egypt. Secondly, there was the immense attractive power of the Great Pyramids.

As for the behaviour of tourists following major events such as those at Luxor, it should be noted that there seems to be a difference according to nationality (UNWTO, 2005). This is an aspect that is explored later in this research. According to an Egyptian tourism official interviewed by Beirmann (2003) and supported by UNWTO figures used in Graph 3-8, the tourism industry had fully recovered from the impact of the Luxor massacre by 2000. However, the only significant source market which had not been restored was Japan, largely due to the fact that a substantial portion of the casualties at Luxor were Japanese and there was lingering reluctance to return. The reluctance of Japanese tourists to return to Egypt may also have been a result of cultural differences where some cultures may be more risk-averse than others (Hofstede, 2001). Again this is an area that is explored later in this thesis.

Egypt, like most other emerging destinations in the Mediterranean and the Middle East, has experienced robust growth over the recent years. The strategy incorporated

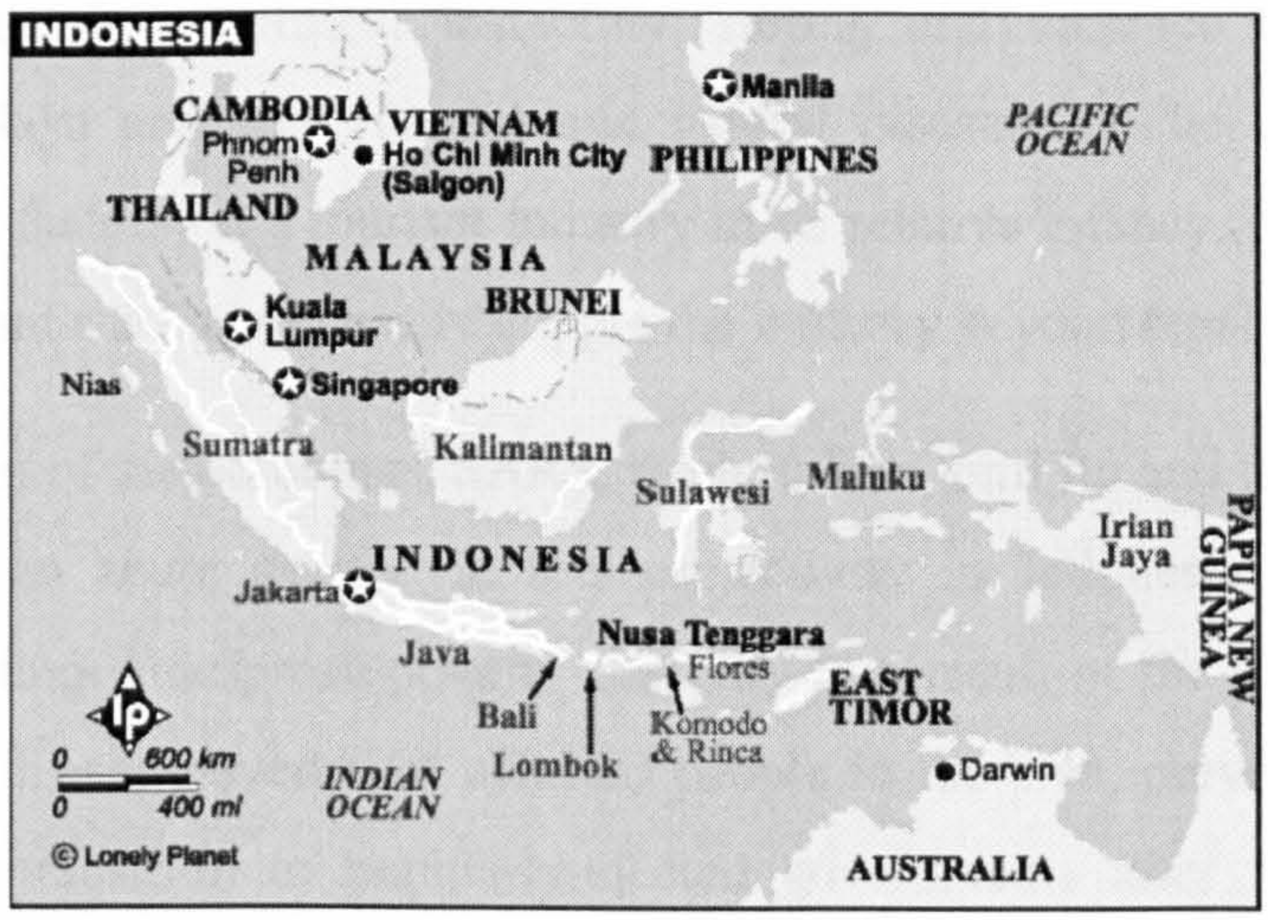
two significant prongs; the consolidation of security and a major PR and marketing campaign to appeal to potential tourists and to restore international confidence in Egypt as a major destination. The utilisation of Burson-Maesteller's consulting services enabled the Egyptian tourism industry and the Egyptian tourist authority to implement highly professional and structured marketing responses and recovery strategies following the terrorist activities.

3.4 A brief history of tourism in Indonesia since 1970

Indonesia is a vast and beautifully diverse country of more than 17,000 islands spread across some 5,000 kilometres of tropical Ocean (see map 3-2). Spanning the seas between Asia and Australia, Indonesia is the largest archipelago. The major Islands of Indonesia are Sumatra, Bali, Java, Kalimantan, Sulawesi and Irian Jaya.

Tourism has been one of the leading sectors in Indonesia's non-oil exports for many years (World Bank 2002) and accounts for more than 3.5 % of GDP. In 2004, more than 5,000,000 tourists visited Indonesia contributing 4.7 US$ billion to Indonesia's balance of payments, about 16% of total exports.

Map 3-2 Indonesia.



Source: adapted from CIA.com

Since the mid-1970s onwards, large amounts of foreign and domestic investment funds were channelled into the hotel and tourism sector. However, the increase in tourist arrivals fell below expectations, with only 592,000 visitors recorded in 1982.

The prospect of declining export revenue from oil prompted a comprehensive review of the sector. In April 1983 visa requirements were lifted for tourists from most West European countries, all Association of South-East Asian Nations (ASEAN) member countries and many countries of the Pacific area, including the US and Canada. Further efforts to promote tourism were launched in subsequent years, and the period from 1993 to 2003 was designated Visit Indonesia Decade by the culture and tourism department. Thus, the industry got off to a slow start.

From 1986 onwards the growth of the industry accelerated sharply, with the number of tourists visiting Indonesia increasing by an annual average of 19.7%, from 825,000 in 1986 to an estimated 5 million by 1995. In the same period tourist spending increased by 25% a year, from US$644m to US$5229m. In the following two years earnings continued to rise, but the number of tourist arrivals stabilised at around five million a year.

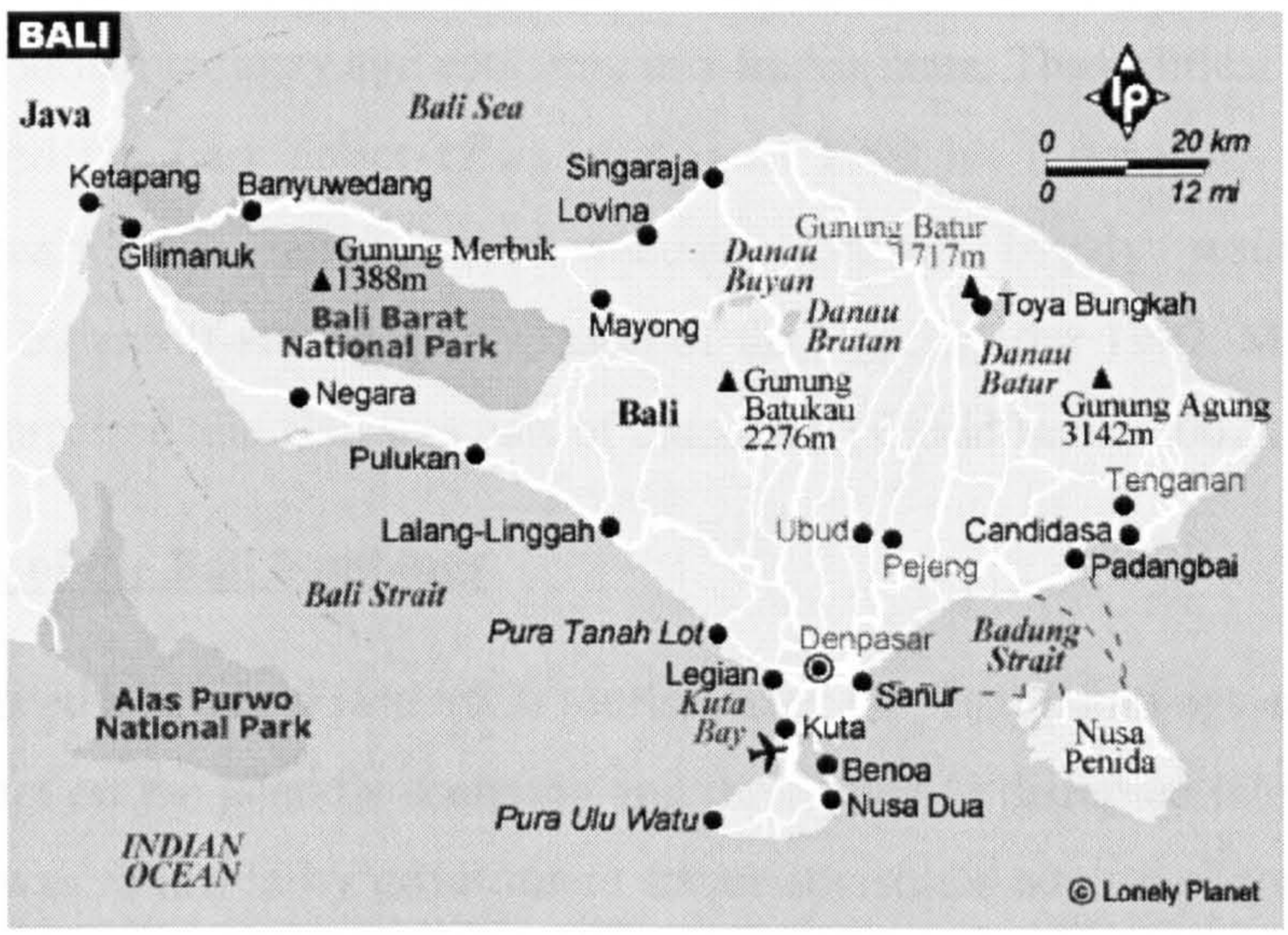
In the summer of 1997, Indonesia suffered a major economic setback, along with most other Asian economies. Tourist visits started to drop, falling to just 3.8m people in 1998, 3.9m in 1999 and 4.15m in 2000 as a result of rising civil unrest and political instability combined with the financial crises that was affecting the Tiger economies (www.factmonster.com). Since 1997 Indonesia has been beset by crises: terrorism, the Asian financial crisis, political instability, rioting and violence (Aceh, Ambon, Borneo, Irian Jaya and East Timor) and natural disasters. The impact of these heightened risk factors on a tourism industry in its relative infancy, particularly after its rather reluctant start, could easily cripple the industry beyond repair.

The combination of the bombings, SARS, the Iraq War, bird flu and tsunami certainly brought about an acute decline in tourism activity in Indonesia. Current issues include: alleviating widespread poverty specially as a result of the Tsunami in Ache which brought deeper poverty for affected people in the area, preventing terrorism, continuing the transition to popularly-elected governments after four decades of authoritarianism, implementing reforms of the banking sector, addressing charges of cronyism and corruption, holding the military and police accountable for human rights violations, and resolving armed separatist movements in Aceh and Papua (CIA 2005). None of these ingredients are desirable if travel-related risk to Indonesia is to be mitigated.

3.4.1 The Bali bombings

Bali is the largest holiday destination in Indonesia for both international and domestic tourists (see map 3-3). Tourism is the major economic activity on Bali, employing 60,000 people in restaurants and hotels alone and estimates suggest that tourism represents around 50% of the island's economy Cooper et al. (2005). One of the most attractive features of the destination is its low prices (particularly for restaurants and personal services) where they are about half the price of similar services in typical North American or European establishments.

Map 3-3 Bali.



Tourism in Bali appears to be dominated by international visitors, with domestic visitors playing a more limited role. Total reported stay-overs at hotels in Bali were 5.7m in 2000. Over three quarters of these were foreign (4.3 million). Foreign tourists tend to stay in more upmarket hotels than those occupied by domestic tourists. Moreover, foreign visitors tend to spend only about a third of their total budget on hotels and restaurants. The remainder is spent on a host of other goods and services that impact on all sectors of the local and regional economy.

Not all visitors to Bali arrive directly on the island (Ngurah Rai airport), but the figures do provide an insight into the nationality composition. The top three nationalities in 2001 were Japanese (24%), Australian (19%), and Taiwanese (12%).

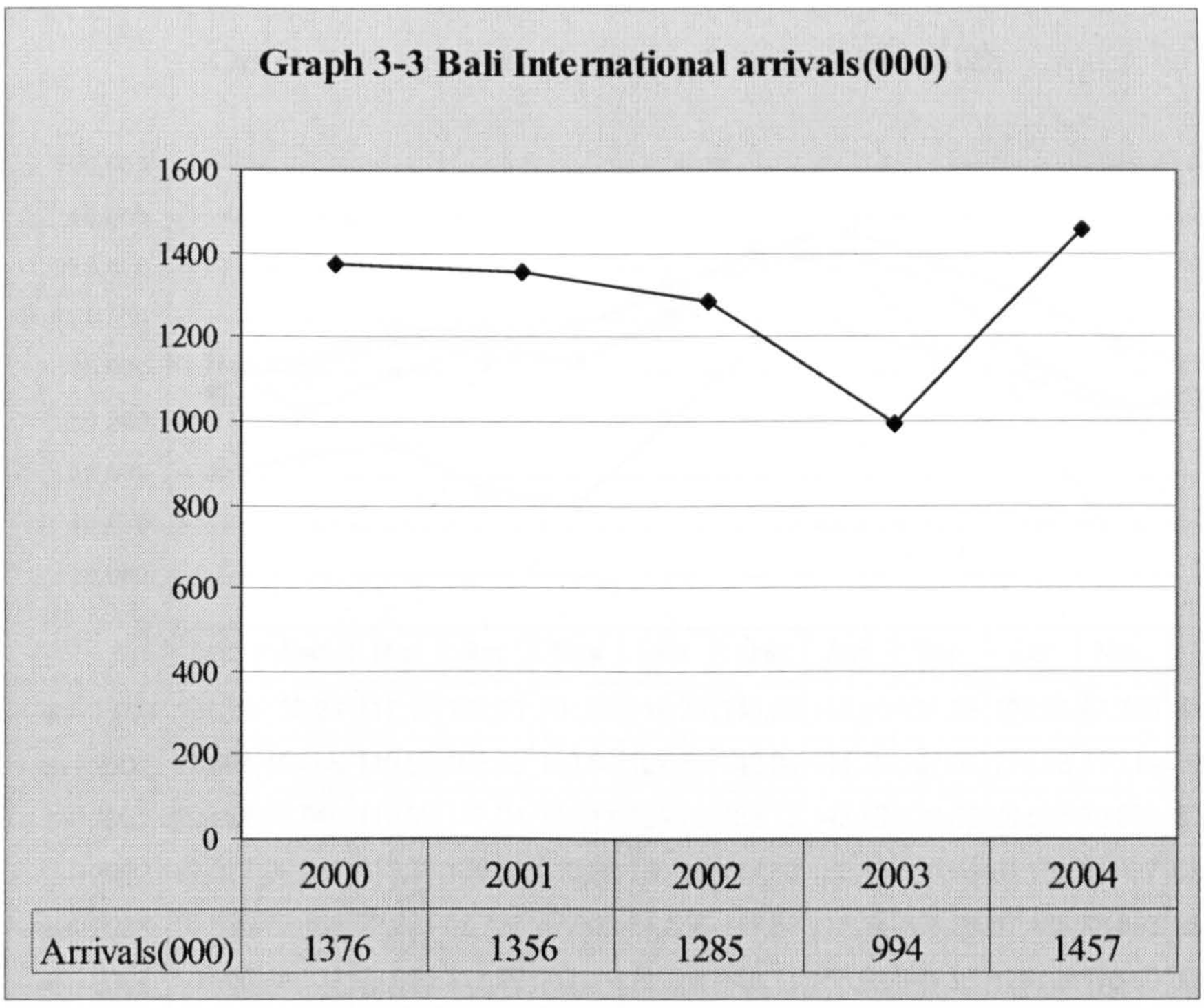
Many visitors to other major Indonesian tourist destination such as Lombok, Yogya in Central Java and Toraja in South Sulawesi also go to Bali.

Although Indonesia has suffered at least 40 bomb attacks since 1998, the Bali strike at the heart of the tourist industry was the first tragedy that killed Western tourists. The Bali bombings of 12 October, 2002, which happened in Paddy's Bar and the Sari Club (in Kuta, see map 3-3) resulted in over 200 deaths and 300 wounded (Harymurti, 2002). Most victims were young tourists from Australia, New Zealand, Europe, South- East Asia and North America.

The Bali bombings followed a period of events in Indonesia that had already placed the island's tourism industry and economy in a fragile state. The political upheavals of May 1998 and the East Timor crisis of August 1999 hit Indonesia's international image. Nevertheless, Bali's tourist industry proved largely resilient, helped considerably by an off-setting depreciation of the Rupiah after 1997. Many a visitor was indeed surprised that Bali was part of Indonesia (World Bank, 2002).

3.4.2 Impact of the Bali bombings

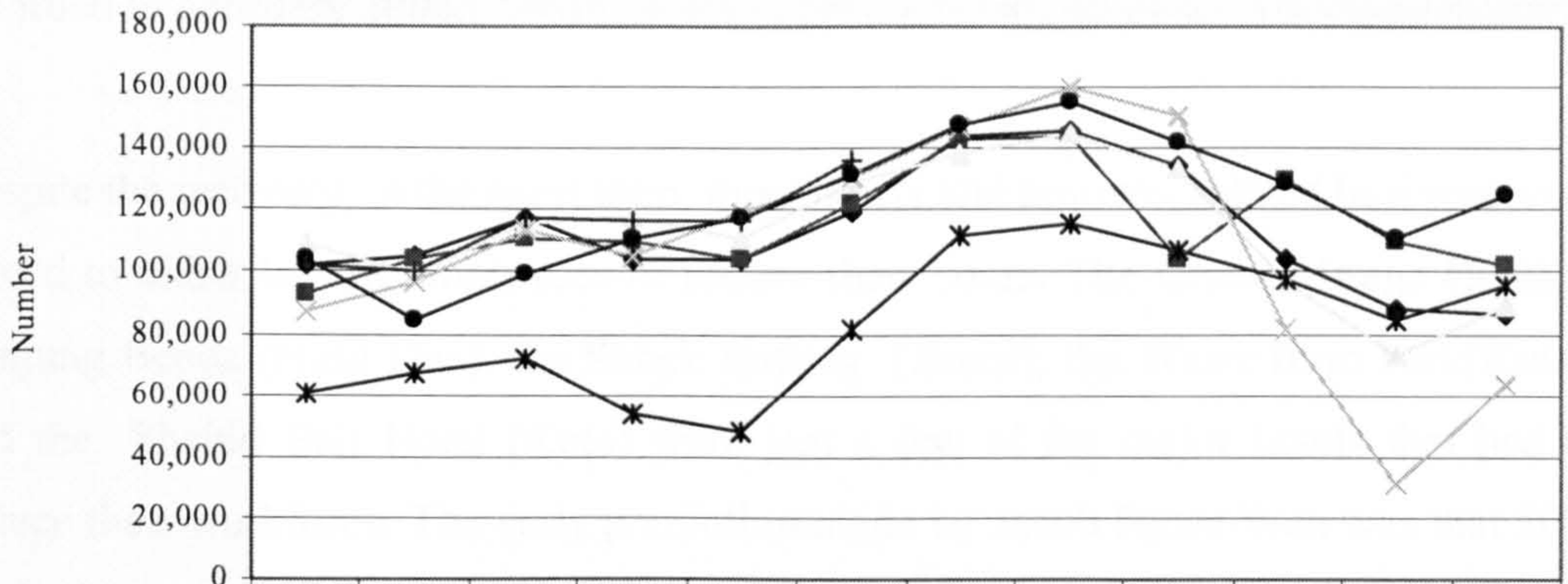
Bali experienced a severe downturn in tourism after the Bali bombings and this had a marked impact on the Island's economy and threatened to disrupted inter–communal relations. It was followed by government travel advisories advising against travel to Bali, which lasted 18 months (BBC 24 NEWS 01.10.05). Indeed, until the bombing, Bali was routinely excluded from travel advisories that applied to the rest of Indonesia Cooper et al. (2005). As a result of bombings international arrivals as measured by immigration at Ngurah Rai airport declined sharply in 2003 and were running at around 20% less the previous year and 26% down on the 2001 figures (see graph 3-4).



Source: adapted from Bali discovery.net

Monthly visitor arrivals in November 2002 were 31,497 (see graph3-5) compared with 72,806 for the same month in 2001 and 110,145 for November in 2000 (the decline in number for 2001 when compared with 2000 is perhaps as result of the 9/11 event).

Graph 3-4 Direct tourist arrivals to Bali by month



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1,999	102,20	105,24	117,17	104,20	104,52	119,35	143,92	146,20	134,68	104,25	87,763	86,365
2000	92,604	104,08	110,58	109,63	103,93	122,35	142,94	144,32	104,00	129,93	110,14	102,29
2001	108,89	99,040	115,99	117,04	111,11	128,79	138,15	145,29	133,66	96,537	72,806	89,443
2002	87,027	96,267	113,35	104,96	119,28	130,56	147,03	160,42	150,74	81,100	31,497	63,393
2003	60,836	67,469	72,263	53,726	47,858	81,256	111,82	115,54	106,76	97,435	83,853	95,783
2004	104,06	84,372	99,826	111,02	117,19	131,54	148,11	155,62	141,95	128,39	110,50	125,35
2005	101,93	100,63	117,14	116,27	116,61	136,64						

Time

Source: adapted from Bali tourism authority.net and Balidiscovery.com

Hotel occupancy, which often only ran at around 80% in the high season, has rarely risen above 40% in most hotels since the onset of the crises and has been as low as 10% in some particularly badly areas such as Nusa Dua in November. According to figures released by the Governor's Command Post, overall occupancies on the island stood at an average 18% on October 26, 2002, down from a level just over 70% in the days just prior to the tragedy (Bali discovery 2002). The first post-bombing signs of recovery were evident in October 2003 when the arrivals number passed the previous number in 2001 a year before the attack took place. This, of course, does not represent full recovery as one would need to not only restore tourism activity to where it would have been had it continued to grow at the pre-event rate, but also retrieve lost revenue during the impacted period. By 2004 the situation had improved markedly with foreign arrivals returning, and even exceeding, the pre-bombing figures (see Graph 3-4). Interestingly, the impact of the Tsunami in comparison is not associated with a decrease in visitor numbers, but instead experiences an increase in the number

of visitors. For example, visitor arrivals in February 2005 were around 20% greater than those for the same month the previous year and 50% greater than the number recorded in February 2003.

Despite the recovery, in the short term, most hotels and tourism- related business were forced to either lay off employees or reduce their hours. The Grand Mirage Hotel in Tanjung Benoa (Nusa Dua), the Sobek Rafting (Sanur), the Water Bom Park(Kuta), and the Shahid Bali Hotel (Kuta) were just a few of the major hotels that had to reduce their workforce. The early prediction made by Jacob Nuwa Wea was that 50% of Balinese workers employed in the tourism sector would lose their jobs in the tourism industry if it failed to recover within the year (Bali discovery.com).

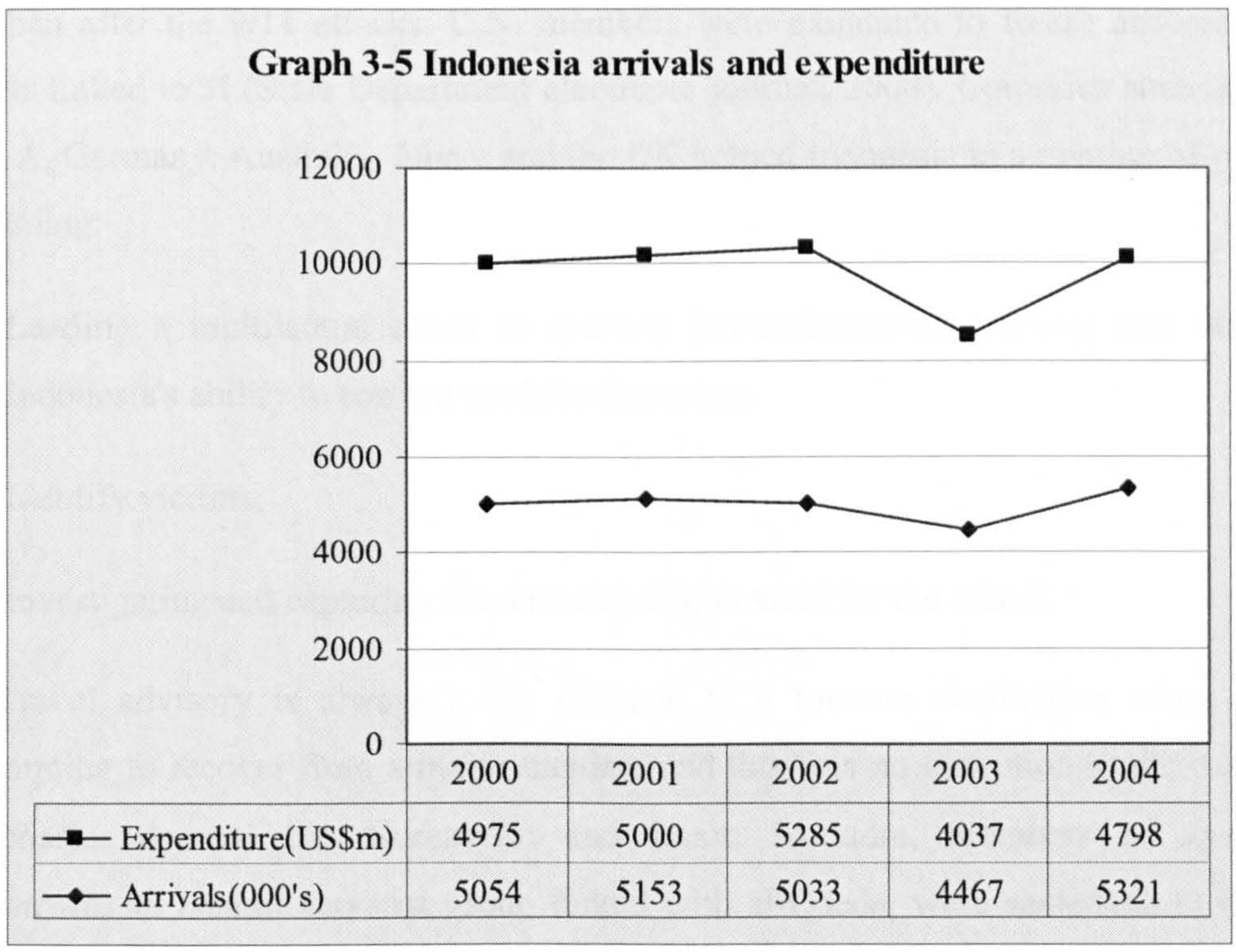
It is difficult to be precise about the true impact of the bombings and the relatively quick recovery path may obscure a more severe level of disruption because figures were under-reported. Incentives for people to retire early were made and, because these redundancies were technically voluntary, there was no compulsion to report them to the Department of Employment. They were therefore not officially recorded as having lost their jobs due to the crisis and such job losses were not regarded by the labour unions as being an infringement of employment laws (Hitchcock, 2005). According to the Bali Post, 2003 in East Bali, particularly in the Candidasa (see map 3-3) beach area, one of the popular tourist destinations with middle and low budget hotels, many hotels and bungalows were put up for sale.

In terms of air traffic flows and disruption there was a similar impact. Air Paradise, a new air carrier owned by Bali businessman *Kadek Wiranatha* (the owner of paddy's Bar) was another casualty of the bombing. Scheduled to commence service between the cities of Perth and Melbourne in Australia and the island of Bali on October 27, 2002, a decision was made to delay the airline's launch until further notice as a result of the Bali bomb (www.balidiscovery.com). Qantas (QF), down from four return services operated prior to the October 12th tragedy, operate only one weekly return Boeing 737 Perth-Denpasar service flight each week from December, increasing to two services a week in January; and cancelled the weekly Melbourne-Denpasar service. Cathay Pacific Airways Cathay Pacific (CX) cut 3 of their normal 10 weekly flights between Hong Kong and Bali. Garuda Indonesia (GA) reported drops in

passenger uplifts from both Europe and Australia of as much as 60-70 % following the bombing (Bali discovery.com, 2002). In a related development, both Garuda Indonesia and Qantas, the other air carriers flying to Bali from Australia, promised to refund all holiday flights without penalty for passengers wishing to defer or cancel their Bali holidays (Balidiscovery.com, 2002).

According to Hitchcock (2005) economic activities were generally or much reduced following the onset of the crisis, and those affected included not only people who work directly in tourism, but also those who work in related supporting sectors such as local transport, shops and garages.

By mid 2003 business activities in the tourism sector had started to pick up, though the rate of increase was still well below the level of the pre-bombing era. Increasing confidence among tourists to visit and stay in Kuta led to the re-opening of many bars and restaurants, which had been closed since the bombing. Among those re-opening was Paddy's Bar, which had been made famous by the bombing (Chulov, 2003 in Hitchcock 2005). With the re-opening of Paddy's almost all of the 120 staff of the old Paddy's Bar, none of whom were killed in the blast, came back to work. Unlike the Sari Club workers who have remained unemployed. However, wages in Bali's tourism industry were much reduced simply because of the downscaling of business and workers received fewer and smaller gratuities from tourists.



Source: adapted from UNWTO 2007

3.4.3 The Indonesian response to the crisis

The Bali bombings caused Indonesia to respond and react quickly and appropriately. According to Indonesia's Minister of Culture and Tourism, *I Gede Ardika* (2002) the goal of the perpetrators was economic disruption, the Minister suggested that one of the means to fight the threat of terrorism was to support his efforts to rebuild tourism in the wake of the attack. *I Gede Ardika* (2002) furthermore said:

"We ask for the understanding and assistance of the world to come to the aid of the Balinese people who love and cherish peace. It makes no sense to isolate them (the people of Bali). If we compare, when the WTC (World Trade Centre) was attacked no one issued a travel ban on the U.S.A., did they?"

Due to the horrible nature of this terrorist attack and its international dimension, the world community responded quickly by offering various kinds of assistance to the Indonesian government, including assistance in the investigation of events, something that was recommended by the Pacific Asia Travel Association according to Cooper et al (2005). A partnership of 52 countries requested or supported the United Nations terrorist designation of *Jemaah Islamiya*. More than 150 jurisdictions agreed to block the assets of *JI* related targets. This designation represented the broadest and most conspicuous alliance against a terror group since the designation of al-Qaeda and the

Taliban after the 9/11 attacks. U.N. members were mandated to freeze and capture assets linked to JI (State Department electronic journal, 2004). Countries such as the U.S.A, Germany, Australia, Japan, and the UK helped Indonesia in a number of ways, including:

- Leading a multilateral effort to provide law-enforcement training and bolster Indonesia's ability to combat terrorist financing;
- Identify victims;
- Investigating and capturing the terrorists responsible for the attack.

A Travel advisory is always a big obstacle to a tourism destination when it is attempting to recover from a major incident and this was no exception in the case of Indonesia. Amrozi bin Nurhasyim and Imam Samudra, members of *Jemaah Islamiyah*, an Islamic terrorist group linked with al-Qaeda, were sentenced to death for their roles in the bombing. But the radical Muslim cleric Abu Bakar Bashir, believed to be the head of *Jemaah Islamiyah*, was only given a light three-year sentence on lesser charges, causing parts of the international community to question Indonesia's commitment to fighting terrorism. Authorities arrested Bashir in April 2004—on the same day he was set to be released from prison—claiming they had new evidence that proved he was in fact the leader of *Jemaah Islamiyah* and that he approved the Bali bombing. In March 2005, Abu Bakar Bashir was found not guilty of terrorism charges in the bombings of Jakarta's Marriott Hotel in 2003 and a Bali nightclub in 2002. He was, however, convicted of a lesser charge than was expected.

The new government (2004) had taken a positive step in positioning tourism as a strategic sector in the country, its status upgraded from a state ministry to a ministry. The Indonesian Culture and Tourism Promotion Body (16.12.2002) announced that RP.10 billion (approximately 1.1 US$ million) had been used to pay for the establishment of a crisis centre, for advertising campaigns carried on CNN and CNBC, and for a promotional road show to traditional source markets in the Asia Pacific region.

The possibility of an anti-Muslim backlash also seemed to have stiffened the resolve of Bali's opinion leaders and provincial officials to avoid inter-religious and inter-ethnic conflict at all costs. Bali's and Indonesia's leaders were well aware that even

small clashes could lead to a long–term deterioration in relations that would not only prolong the time taken for tourism to recover, but might kill off the industry altogether.

Following the arrest of the bombing suspects it emerged that they were all Muslims, consequently there were fears amongst Indonesian officials that this information might fuel further inter-religious unrest in the manner of Ambon (Hitchcock, 2005). Although Indonesia is a country which has the highest proportion of Muslims (88%) in the world, Hindus account for 92% of the population of Bali. According to Hitchcock 2005 the troubled Moluccan Island (Ambon) had experienced severe Muslim and Christian clashes since the late 1990s and the government was keen to avoid a similar conflict between Muslims and Hindus. In an attempt to defuse the situation, all Islamic groups in Indonesia including Majelis Ulama Indonesia (MUI) showed their support and called for the sternest possible punishments to be meted out to those found guilty of the October 12th bombing. In a public statement issued on October 27th, the General Secretary of the MUI, *Din Syamsudin*, said (Bali Discovery, 2002):

"We ask that the bombers receive the harshest possible punishment because they have caused the deaths of others."

The measures adapted to avoid conflict were not unlike those used in the post-Suharto (Indonesia's president 1967-1996) period when signs were posted throughout the island that said "Bali is safe, the tourists come". The programme and the slogan were widely rejected in Bali largely because the Balinese saw them as having been devised in Jakarta, the national capital, and were thus out of touch with local perspectives. One of the reasons for the ambivalence on the part of Balinese stakeholders in tourism was that the recovery programme appeared to benefit Jakarta (Aridus, 2002; Wedakarna, 2002).

Furthermore, Bali's borders have, unusually for an Indonesian province, coincided with those of the island and there are fears that devolution to the regency level could disrupt Bali's coherence. This is not only cultural and ethnic issue, but it is also an important consideration in tourism management since many leisure activities cross regency boundaries. Therefore, when considering the response to incidents such as

terrorist acts, it is important that due account should be taken between the various segments (political as well as religious) of society as they can all add to the complexity of finding an appropriate response.

Security and the informal sector were other issues that needed to be taken into consideration. The tourism authorities have long regarded the activities of the unlicensed hawkers and vendors of the informal sector with some apprehension. The prevailing view among government officials was that anarchic behaviour of over exuberant traders contributes to a sense of unease among visitors at the best of times but would be far more troublesome once the heightened risk perceptions of tourists were involved (Hitchcock, 2005),(see Table 3-6).

Table 3-6 World Bank index of political stability and control of corruption (selected countries)

Country	Political stability	Control of corruption
Indonesia	-1.38	-0.9
Egypt	-0.72	-0.21
Kenya	-0.96	-0.89
U.S.A	0.47	1.83
Spain	0.54	1.46
UK	0.77	2.06
Iceland*	1.77	2.43
Somalia **	-2.39	-1.58

Source: adapted from World Bank 2004

*The most politically stable country

**The least politically stable country

Since the bombing, security has been given much higher priority and, as a result of that, anything that suggests that Bali is anything other than a safe haven is viewed with circumspection. The tourism authorities have long wanted more user-friendly uniforms and even specific tourism training for police officers. However, before the

crisis, hotels and shopping centres in particular were unwilling to see uniformed police protecting their premises because they felt that it heightened tourists' sense of insecurity. The number of intelligence officers was tripled at all points of entry, partly because of renewed fears about fall-out from unrest in Ache and increasing awareness of *Jema'ah Islamiah's* network.

The second outcome was the inauguration of beach policing (tourist police) on Kuta Beach (Map 3-3) in the 'Baywatch' style associated with USA and Australia, perhaps to make visitors from those countries feel more secure. Advisors from Japan and Australia were also brought in to help upgrade the island's security (State Department electronic journal, 2004). The new security measure eventually led to a system of accreditation for hotels run by police, which included improved mapping of hotels and resorts. Street traders were among the first to feel this change of emphasis in policy and instead of waiting to be registered, many chose to leave the island, presumably to return from whence they came.

In addition to the largely practical measures discussed above, the Balinese adopted a number of local measures that contributed, albeit controversially in some cases, to the alleviation of the crisis. First, there was an elaborate purification ritual involving huge processions of traditionally clad islanders bearing offerings which were published widely in the international media, often with little interpretation. In essence the bombing ended up beginning construed by the islanders as an expression of the anger of God as a consequence of the bad Karma suffered by Bally for having ... always impurity to hold sway of the land (Coutiea, 2003). Two authors have also discussed the use of Balinese culture as a weapon to counter the crisis, a strategy that has its origins in the first century AD according to local performing artists (Jenkins & Nyoman Carta, 2003 in Hitchcock, 2005).

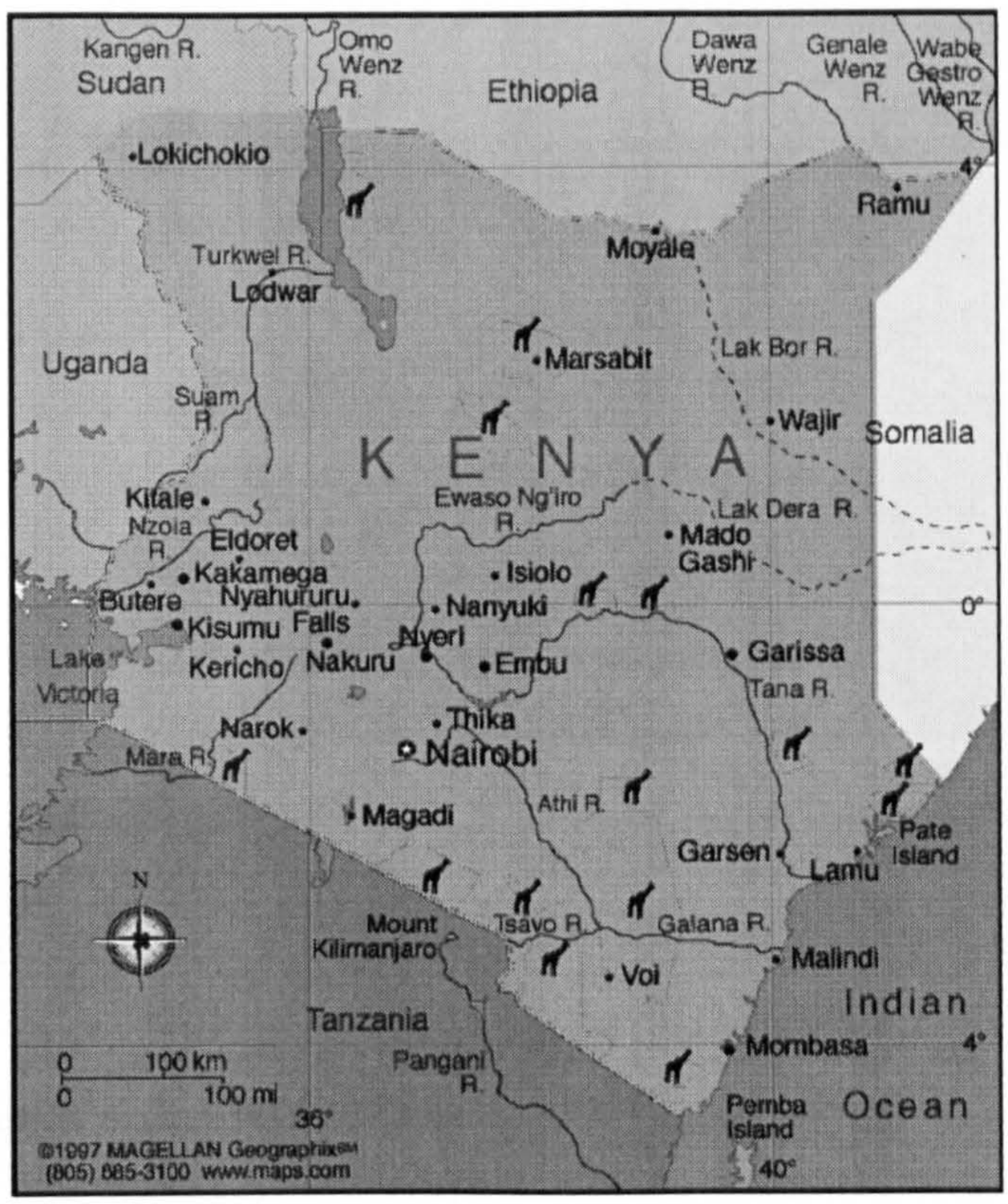
There were concerns that Islamic radicals would disrupt the trial of the bombing suspects and the police, fearing that they might be over-stretched, sought assistance from the *pecalang* and inaugurated capacity-building measures to boost their ability to make the trial secure. Such was the growing confidence of the regular police in the *pecalang* that these auxiliaries were deployed during the visit of President George W Bush (Hitchkock, 2005).

As can be seen from the above, the government's response to the atrocities was a mixture of practical security measure and cultural strategies, designed to stave off inter-communal strife. Hitchcock (2005) suggested that a Balinese model of crisis management, a wide desire for peace, joint prayers, media restraint, and involvement of opinion leaders, may have wider applications in coping with the impacts of terrorism and conflict resolution within the context of tourism. Generally, the world felt that the Indonesian Government had behaved rapidly, responsibly and professionally in order to prevent an ethnic clash and embrace international help, particularly from westerners including U.S.A (super power) Australia and Japan, together with marketing campaigns and action against terrorism to restore confidence in Bali as a destination.

3.5 A brief overview of tourism in Kenya

Kenya lies along the East coast of Africa; bordering Ethiopia, Uganda, Somalia and Tanzania and the Indian Ocean (see map 3-4). Tourism in Kenya dates back to pre-independence days and history has it recorded that as early as the 1930's, inbound tourism and explorers started coming to Kenya mostly for big-game hunting expeditions while others came in search of solitude. These expeditions were locally referred to by the Swahili word "Safari" thus, bequeathing to the travel world literature a new entry to the vocabulary. Among the early visitors were Statesmen, Royalties and celebrities such as Theodore Rosevelt, Her Majesty Queen Elizabeth II, and Ernest Hemingway. http://www.un.org/esa/agenda21/natlinfo/niau/kenyanp.htm

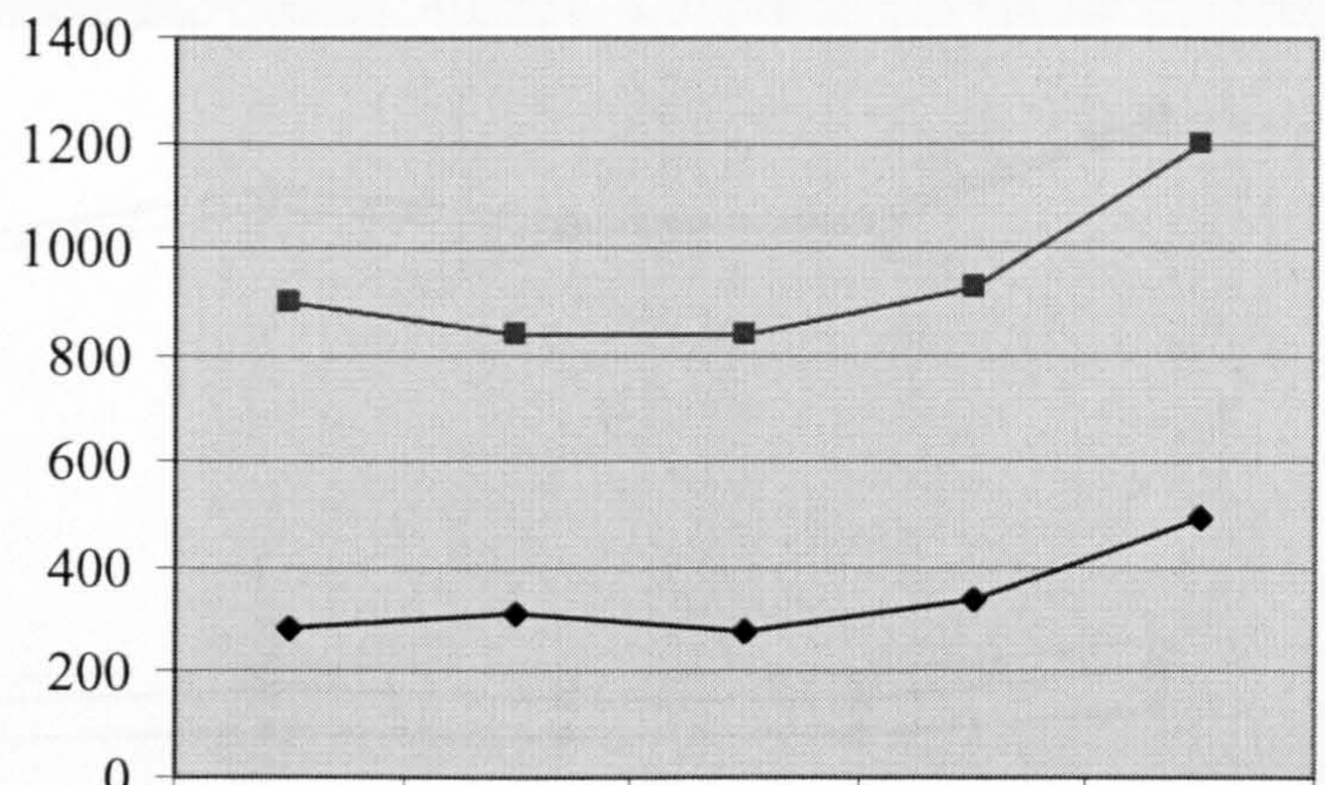
Map 3-4 Kenya



Source: adapted from Fact monster (2006)

Tourism, largely based on natural attractions, including wildlife in its natural habitats as well as calm beaches, is the portfolio of Kenya. Tourism is currently the second largest provider to the economy after agriculture. The sector is a major employer, employing over half a million, some 11% of the total workforce (BBC.28.11.02). Of these people, 300,000 work directly in the industry, while 200,000 work in other sectors that support it. According to the Kenya Tourism Federation, in National Geographic (17.06.03), tourism accounts for approximately 4% of the country's GDP and is crucial to the economy, bringing in U.S. $500 million in foreign exchange.

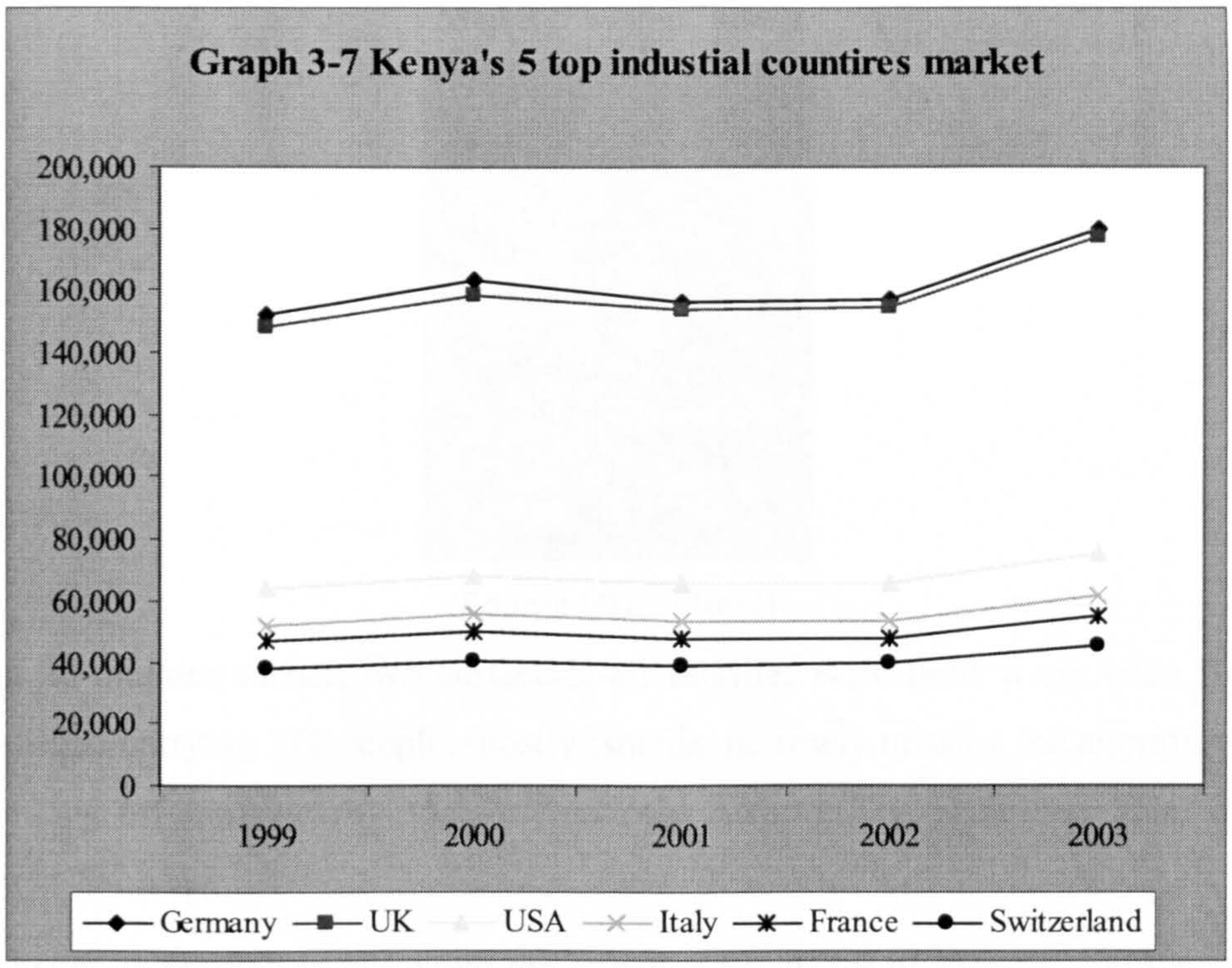
Graph 3-6 Kenya ,arrival and expenditure



	2000	2001	2002	2003	2004
Expenditure(US$)	283	309	276	339	495
Arrivals(000's)	899	841	838	927	1199

Source: adapted from UNWTO 2006

Kenya ranks 6th in Africa, in terms of the number of international visitors, after South Africa, Tunisia, Morocco, Algeria, Zimbabwe. However, when it comes to tourism receipts its ranking falls to 8th, falling behind Botswana and Mauritius, in addition to former countries. The major western markets for Kenya are Germany and the UK followed by USA, Italy, France and Switzerland (see Graph 3-7).

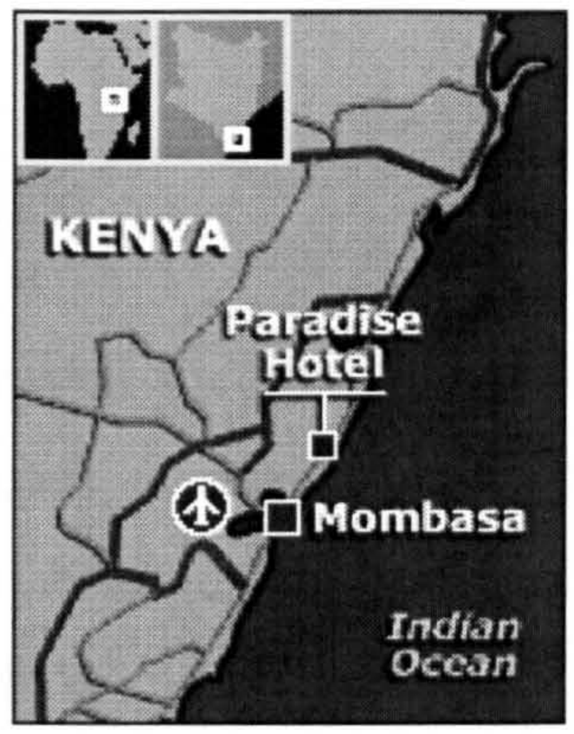


Source: adapted from UNUNWTO e-library (2006)

3.5.1 The bombing in Mombassa

In November 2002, three Suicide bombers launched an attack on an Israeli-owned hotel on the Kenyan coast that was traditionally used by Israelis. An SUV, thought to be loaded with explosives smashed through the entrance, setting off a huge blast where only shortly before a group of Israeli tourists had arrived in the lobby at the start of their holiday. Local Kenyans, most of them dancers, who were welcoming the Israeli guests, bore the brunt of the blast. At least 15 people died at hotel; three suicide bombers were killed, along with nine Kenyans and three Israelis, two of whom were children. About 80 people, most of them Kenyans, were injured in the attack and many treated for burns. Moreover, a large part of the Paradise Hotel was reduced to rubble while the rest was an on fire; the Israeli-owned hotel was well-liked with tourists keen to escape the violence at home (BBC, 28.11.28).

Map 3-5 Map of attack



Source BBC (2002)

About 20 minutes earlier, two surface-to-air missiles were fired at an Arkia Boeing 757 airliner carrying 271 people, mostly Israelis, narrowly missing the aircraft, which was taking off from nearby Moi International Airport. The plane was able to land safely in Tel Aviv.

In Lebanon, a previously unknown group called the Army of Palestine said it carried out the attacks. Al-Manar television in Lebanon later reported a short statement from a group called the Army of Palestine claiming responsibility for the attacks (BBC.2002). But Kenyan and Israeli officials speculated that Osama Bin Laden's al-Qaeda network might have been responsible. The Kenyan Ambassador to Israel, John Sawe, said in Tel Aviv: "There is no doubt in my mind that al-Quaeda is behind this attack, because we have no domestic problems, no terrorism in our country, and we have no problem with our neighbours, no problem whatsoever"(Alafrica.com 28.11.02).

The US and Israeli officials suspected that a Somali Group linked to al-Qaeda was responsible for the bombing and speculated that the suspects had smuggled the missiles into Kenya from Somalia (The New York Times, November 30, 2002). Twelve people were arrested in connection with the hotel bombing, including six Pakistanis and four Somalis, as well as an American and her Spanish husband, both of whom were later released.

On February 2004 four Kenyan men charged with killing 15 people by car-bombing an Israeli-owned hotel in Mombassa and planning the attack with the backing of Osama bin Laden's al-Qaeda network. According to the prosecution, the attacks were

masterminded by Fazul Abdullah Mohammed, one of the FBI's most wanted men (FiarfaxDigital, 04.02.04).

3.5.2 The response to the attacks

In August 1998, terrorists targeted the US embassies in Kenya and neighbouring Tanzania in nearly simultaneous car bomb attacks that killed 219 people and 12 people respectively. The hotel bombing in 2002 was the first that directly targeted tourists and tourism superstructure.

Following the attack, the Kenyan president, Daniel arap Moi, condemned the attacks and said that "Kenya will fight those behind terrorist attack on Mombassa".... "Kenya will do everything in its means to stop such acts with or without the assistance of her counterparts in the war against terrorism".

Although the majority of the victims were Kenyan nationals, the fact that the attack took place in an Israeli owned hotel where the guests are almost exclusively Israelis, means that it can be assumed that the intended victims were not supposed to be Kenyans. The Guardian newspaper called the attack on the Israeli airplane an attack on 'mankind's freedom of movement'. The daily telegraph suggested, 'Western tourism is an obvious target for radicals who believe it spearheads the advance of decadent secularism into the Islamic world'(Gurdian Unlimited 29.11.02).

Following the attacks, several Western countries urged their citizens not to travel here because of the risk of terrorist attacks. The U.S. State Department immediately warned Americans against non-essential travel to Kenya. More importantly, the British Department of Transport banned all British-registered aircraft from flying to Kenya, citing threats of shoulder-fired missile attacks on aircraft. Britain is Kenya's second most important tourism market, accounting for 20 percent of all Kenya's visitors (National Geographic, 2002). Adding to this environment of fear was the fact that the British High Commission in Kenya was closed on 4th December for an indefinite period after receiving a "specific threat" less than a week after the Mombassa attacks, but there were no strong issues against UK nationals living in

Kenya or planning to visit (The Guardian, Dec.05.2002). Prior to the attack, Australia began issuing warnings, urging Australians to avoid Mombassa unless they had essential business, and on 12th November they issued a new warning saying there was evidence of threats against "western interests in Mombassa". The Australian warnings were followed the next day by similar appeals for caution from the German government (CNN 30.11.02).

Jake Grieves-Cook, chairman of the Kenya Tourism Federation, however, complained that the travel warnings placed on Kenya by European countries were unfair and added:

"We are all aware of the risks of global terrorism in most countries in the world, but there is no greater risk here than in the United Kingdom. For tourists on safari in Kenya's parks, the risk of a terrorist attack must be much lower than in British cities."

Kenyan Government officials increased security, especially at Kenya's international airports. A team of British anti-terrorist experts carried out thorough inspections of the airport and its perimeter. Four years after the attacks there is no sign of any further attacks against any target in Kenya.

The EC (European Commission) responded to the attacks (following an urgent request from the Kenyan government) by jointly funding an Emergency Tourism Market Recovery Programme, marketing the country in the main European source markets. This support came to an end in March 2004.

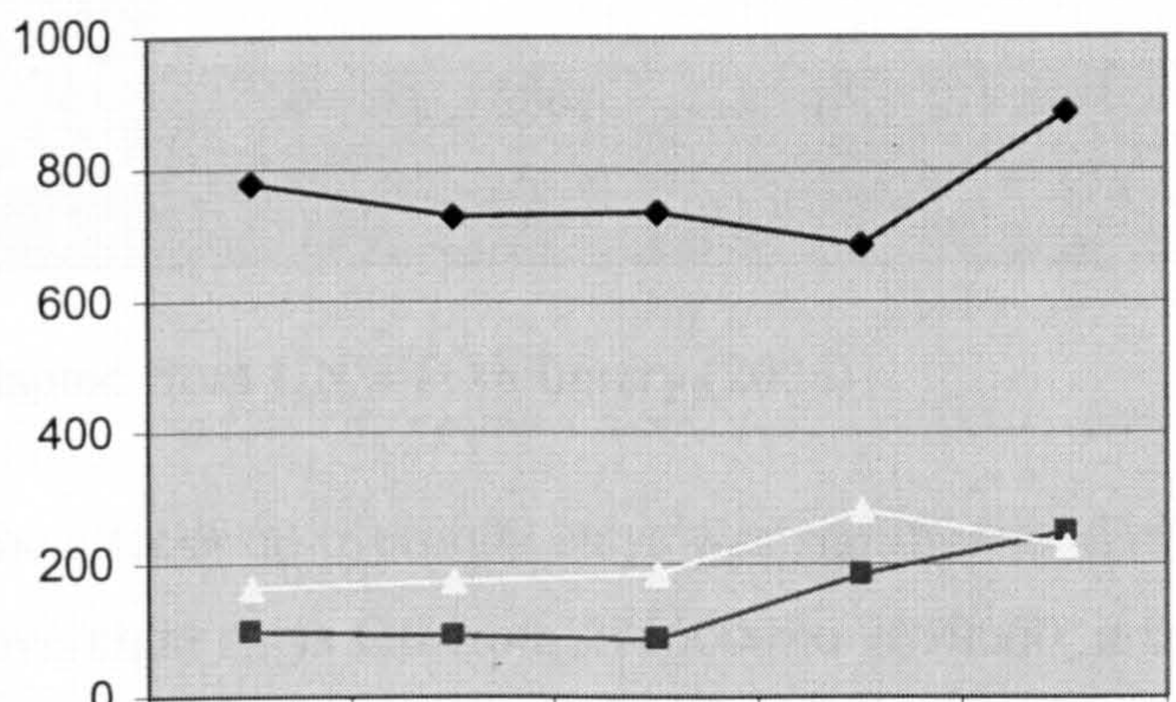
The Director of Kenya's Tourism Board (KTB), Achieng Ong'ong'a, said diversification from the conventional safari and beach tourism and extensive marketing has led to an increase in the number of visitors that has resulted in significant number arrivals to Kenya and significant recovery from the impact of terrorism attacks in Nairobi and Mombassa in 1998 and 2002, to boom.

Thus Kenya relied upon extensive marketing campaigns in its main supplying markets, demonstrable increases in the level of security and some product diversification to reduce tourists' perceptions of risk and thereby offset the reduction in tourism caused by the atrocities.

3.5.3 The impact of the attacks

The inbound tourism arrivals and expenditure were shown earlier, in Graph 3-6. While expenditure increased in 2001 over the 2000 expenditure level, the number of arrivals decreased. The slow down in visitor numbers continued through the following year (2002) where the decline in arrivals was accompanied by a fall in receipts. The slump experienced in 2001 was perhaps the result of a global decrease in tourism flows, following the 9/11 attacks in USA. The Mombassa attack did not cause a decline in tourism activity until 2002. The impact on leisure visitors continued to be felt in 2003 because of the timing of the attack in Kenya, which was at the very end of year 2002 (28.11.02). Recovery was reasonably quick with both the number of arrivals and the level of expenditure increasing by 10% and 22%, respectively, and the recovery also continued in 2004.

Graph 3-8 Arrivals by purpose of visit(000)



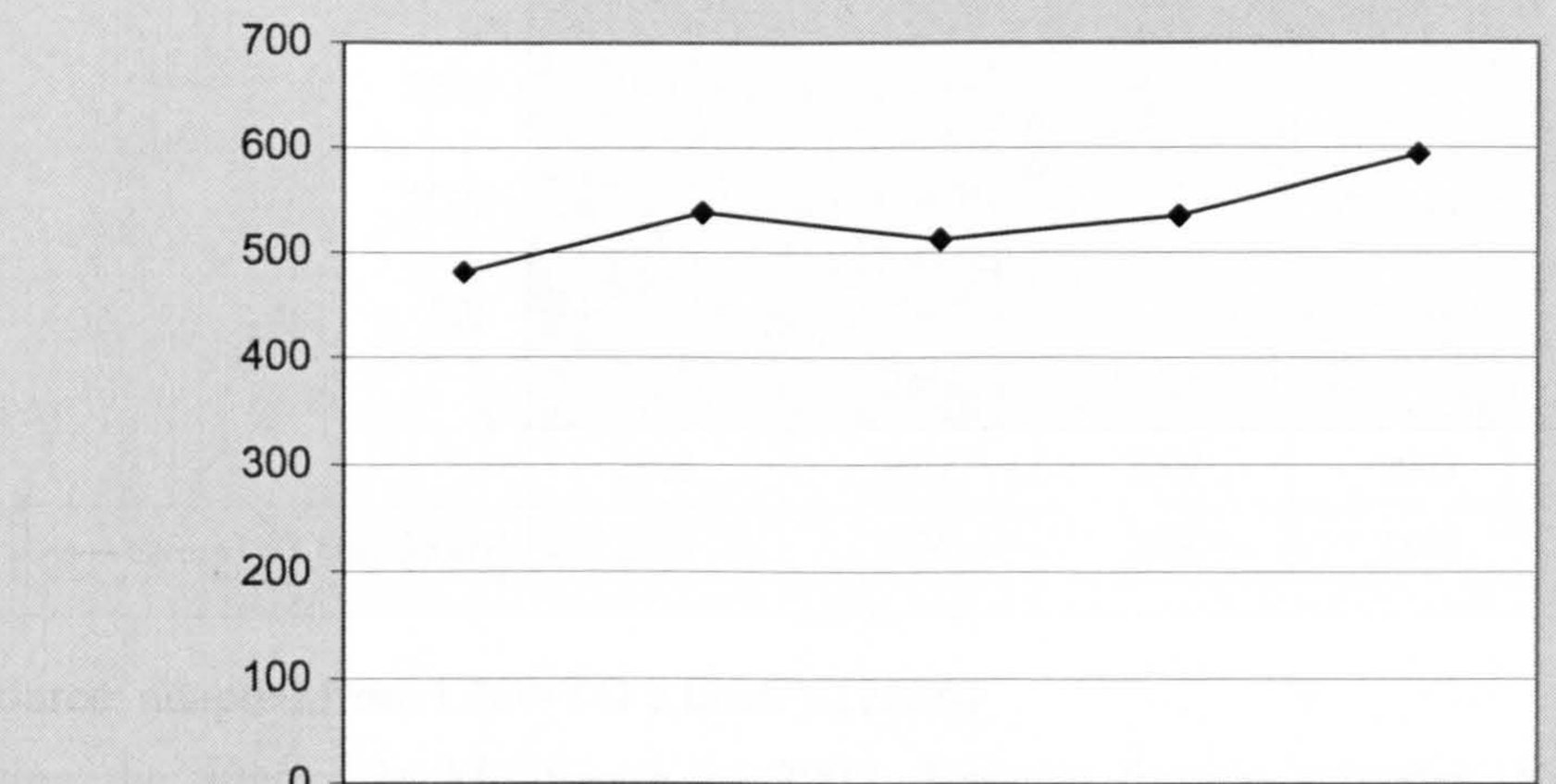
	2000	2001	2002	2003	2004
Leisure	778	729	733	684	886
Business	98	92	86	182	246
Other	160	173	182	280	229

Source: adapted from UNWTO e library (2006)

The first sign of recovery for leisure travellers was evident in 2004 where the numbers grew by 29% from 684000 to 886000. However, the trend for business and other visitors (that remained fairly stable during the immediate post attack period) remained relatively flat showing an increase of only 13000. The average expenditure per person

increased by approximately 12% during 2003, but one can assume that this increase can be largely explained by business travel that continued to increase and therefore account for a larger proportion of total visitors during that period. The average expenditure per person is shown in Graph 3-9.

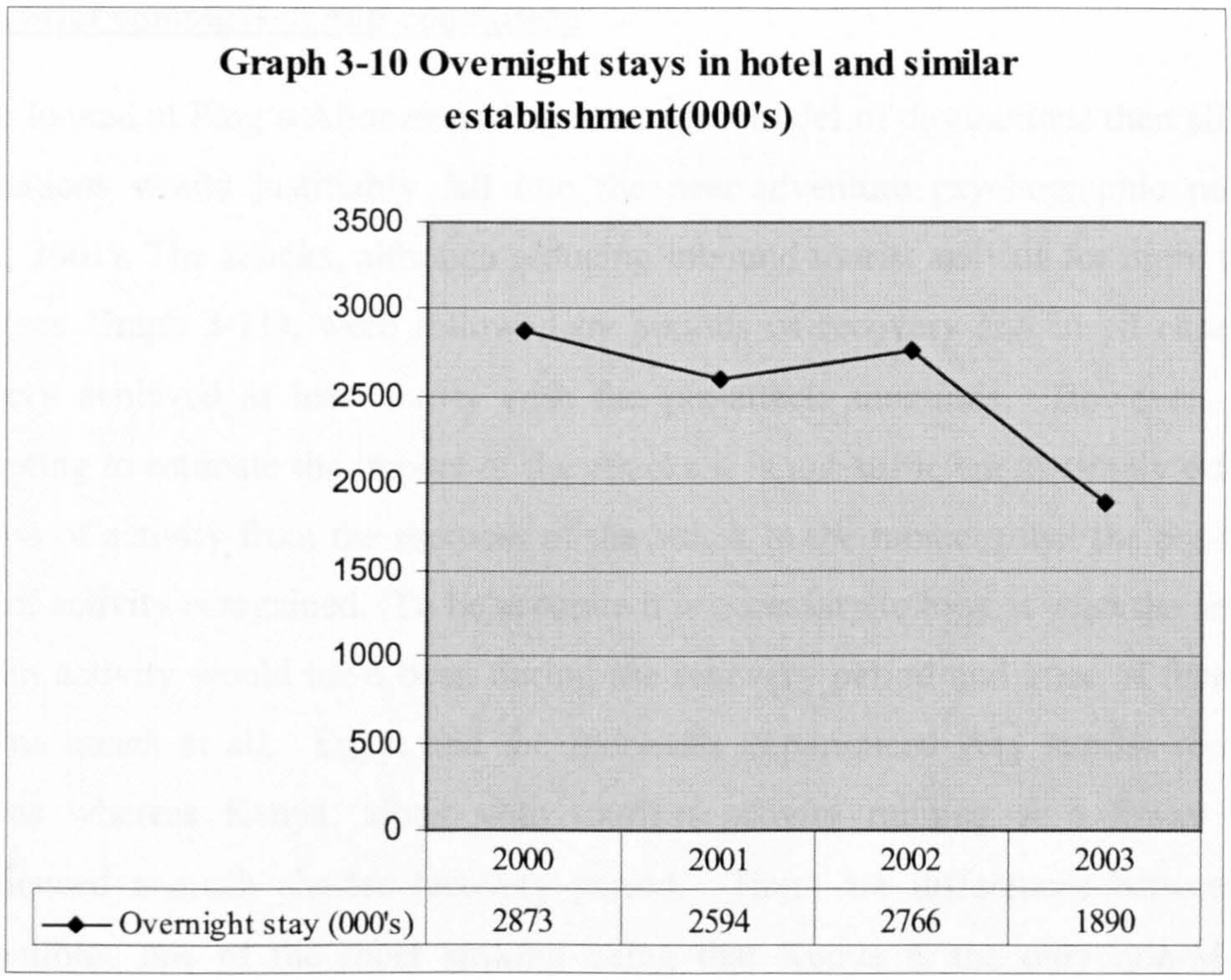
Graph 3-9 Tourism expenditure per person in Kenya(US$)



	2000	2001	2002	2003	2004
per person	482	539	512	533	593

Source: adapted from UNWTO e library (2006)

The impact of the attacks on overnight stays was significant. Graph 3-10 shows that the number of overnight stays fell from 2766000 to 1890000, a fall of 31% in 2003. This drop in guest nights sold was also evident in occupancy rates which fell from a barely sustainable 42% to a probably economically unviable 33.60 %. Using an imperfect and crude measure, if one takes the decrease in overnight stays, which is 876000, and assumes that they were staying in double rooms (leisure travellers) and apply an average room rate of $40 then approximate direct loss could be equal to 17US$m . This figure does not include other expenditure and may only reflect 30-40% of total spending lost, yielding a total loss that could be in excess of 56 US$m without taking into account the secondary impacts of that expenditure. To set this in context it should be remembered that total tourism receipts in 2003 were around 611 US$m in 2003.



Source: adapted from UNWTO e library (2006)

Following the attacks in Mombassa in 2002, Kenya's foreign minister, Kalonzo Musyoka wrote an open letter to the British government:

"Britain and the United States have seen their tourism figures badly affected by the natural fears of a nervous travelling public yet the pain for those economies is sustainable. For us, it is not."

The importance of tourism in terms of Kenya's economy is clear where tourism accounts for around 4% of Kenya's Gross Domestic Product and is the most important source of foreign exchange. The short-term impact of the attack and following travel advisory were significant to the Kenya's economy, particularly in terms of tourism employment and agriculture. The casualties and the attacks relatively were not of a major scale. The attack in Mombassa was perceived to be against tourism, mostly Westerners, particularly Israelis. Nevertheless, the support of the government and the deployment of extensive marketing strategies, helped by the European Commission, repositioned Kenya as a destination where the tourism numbers could once again increase after a period of around 14 months.

3.6 A brief comparison and conclusion

If one looked at Plog's Allocentric-Psychocentric model of destinations then all three destinations would justifiably fall into the near-adventure psychographic position (Plog, 2001). The attacks, although reducing inbound tourist arrivals for more than a year (see Graph 3-11), were followed by periods of recovery and in all cases this recovery achieved at least parity with the pre-attack situations. However, when attempting to estimate the impact of the attacks it is not sufficient to simply estimate the loss of activity from the moment of the attack to the moment that the pre-attack level of activity is regained. To be accurate it is necessary to look at what the level of tourism activity would have been during the recovery period and after, if there had been no attack at all. Egypt and the Indonesia experienced very similar recovery patterns whereas Kenya, albeit with tourism activity running at a lower level, experienced a much shorter recovery period. There are differences between the destinations, one of the most striking being that Kenya is the only non-Muslim country and this may affect both motivations with respect to the attacks and the required response. Indeed, the attack in Kenya was not aimed at tourists and tourism superstructure in general, it was intended to harm visitors of a specific nationality. Also the business and other visitor categories of tourists were able to maintain more buoyancy in the arrival figures in Kenya than was possible in the other two countries. Using Plog's view of tourism destinations it is likely that, in terms of the leisure visitor component, all three destinations are likely to attract people of a particular psychometric grouping and these people, one might assume, may be less risk averse than those visitors who travel to, say, Atlanta in the USA (Plog, 2001).

Running counter to Plog's model one can see that different destinations may appeal to different psychometric groupings depending upon their location in relation to the visitor originating countries. For instance, St. Lucia in the Caribbean is a relatively expensive and exotic location to European visitors and attracts visitors from the upper socio-economic groupings (SEGs). However, to the USA, St. Lucia is a Majorca type destination and attracts mainly people from lower SEGs. The same situation can be observed for destinations like Fiji and Bali. To the Australian visitor these are relatively cheap vacation destinations (mid-Centric) located in their Pacific backyard, but to Europeans and USA visitors they are long-haul relatively expensive destinations. However, at the same time it could be argued that for instance

Australians would believe that Bali along with Fiji traditionally their most international resort, were midcentric destinations. Hence how a destination is classified to some extent depends on the perspective of the market doing the classification. In other words, perceived life cycle stage is market specific, rather than destination specific. Each market has a unique perception formed by geographical closeness, political orientation, and stage of economic development, similarities or differences in culture, language and shared histories and a host of other factors. Since destinations attract tourists from a variety of source markets, it could be argued that destinations can appear at multiple points simultaneously along Plog's scale. A destination may be psychocentric/dependable for some market, mid-centric for others and allocentric/venture for others still (McKercher, 2005). This may affect the levels of travel risk averseness of visitors going to particular destinations, if risk-averseness is in part determined by the characteristics associated with the psychometric model, income, age, education, etc. This is a matter that is further explored later in this thesis.

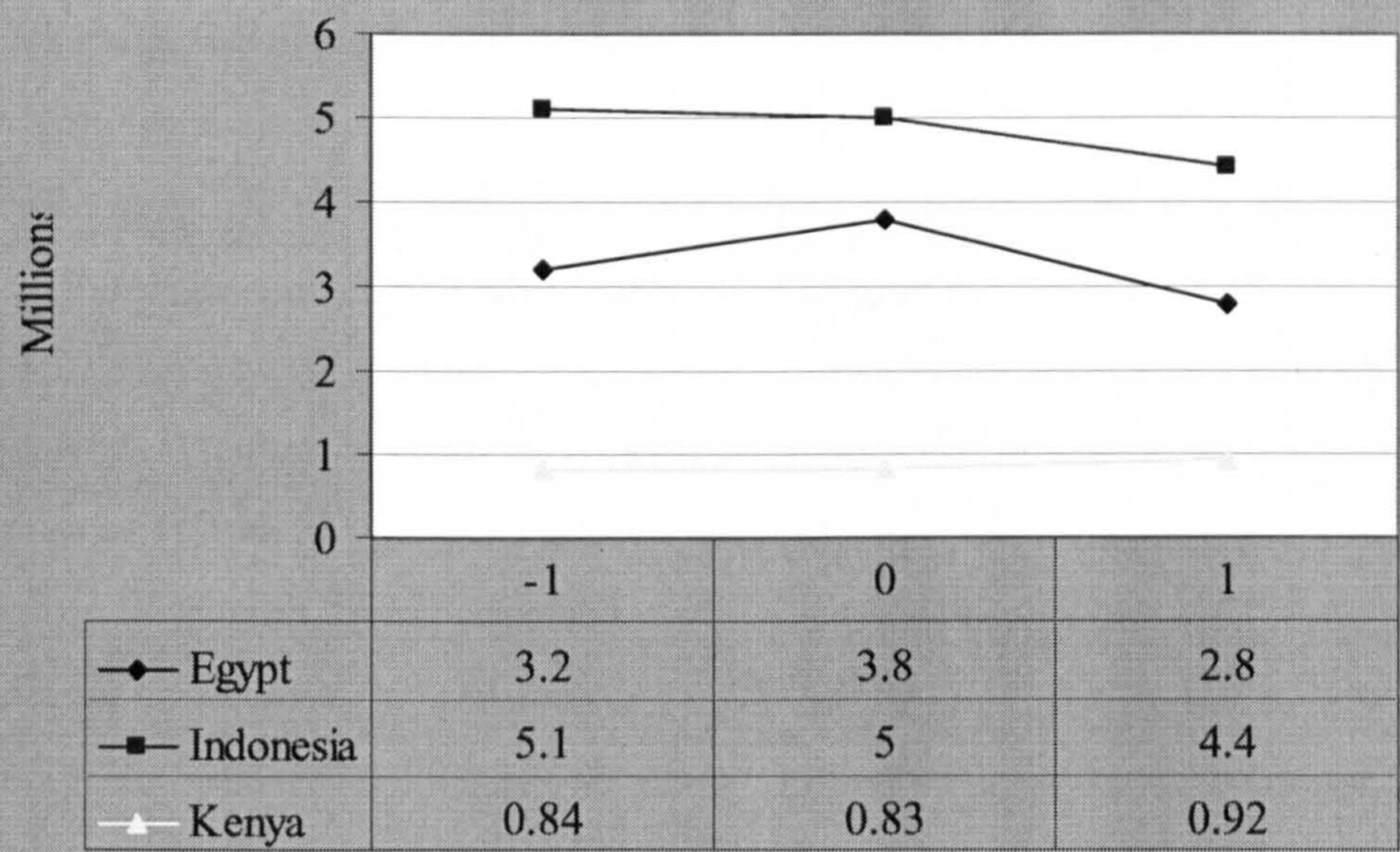
Another issue worthy of mention is that, although the Sharm al Sheikh (23.07.05) attack has not been mentioned in the current study, it is a good example of how world reaction to the attacks, in particular with the US and UK was limited. According to US Secretary of State Condoleeza Rice (2005):

"At this difficult time of testing, the United States stands with our friend and ally Egypt. Together we will confront and defeat this scourge that knows no boundary and respects no creed."

And UK foreign secretary Jack Straw (2005) said:

"I've spoken this morning to my colleague the Egyptian Foreign Minister to assure him of our full support and our full solidarity with the Egyptian people and the Egyptian government. Their fight is ours, our fight is theirs."

Graph 3-11 Arrivals where -1 is the year before the attack 0 is the year of the attack and 1 is a year after the attack



	-1	0	1
Egypt	3.2	3.8	2.8
Indonesia	5.1	5	4.4
Kenya	0.84	0.83	0.92

Source: adapted from Bali tourism discovery.net and UNWTO 2006.

The following table shows the similarities and differences of attack, responses and impacts between Egypt and Indonesia and Kenya, which might help to answer the questions.

Table 3-7 the characteristics of attack, response, impact and countries

Similarities	**Differences**
In all cases the attacks were directed at international tourism	Levels of political stability (see table 3-7)
Attackers were Islamic groups	Levels of corruption (see table 3-6)
Both Indonesia and Egypt are countries with a majority of population Muslim **However, Kenya is not a country known as Islamic**	Geographic location Kenya is not known as a country with the majority of Muslims
Tourism is an important engine for the economy	Number of casualties
The attacks resulted in a major decline in visitor number and tourism receipts	Indonesia is not an Arab county, however it is the most populated Muslim country in the world, but interestingly the
	Majority in Bali are not Muslim.
All three destinations are recognised as lower middle income	Indonesia ranks higher in term of the number of visitors and tourism receipts in comparison with the two other cases.
All countries embraced help from the West, although Egypt can be distinguished in that under Sadat, it was the first country in the Arab world that made peace with Israel which may have increased its attractiveness as a target to terrorist groups.	

The figures from all three cases suggests that although the tourism industry did suffer significantly from the attacks , international evidence shows that terrorist shocks on tourism are temporary rather than permanent and this is heartening (Aly, Hassan Y. and Mark C. Strazicih 2000, UNWTO 2005).

On a positive note, all three destinations found that tourism activity did recover and that the removal of advisory travel warnings and the implementation of extensive marketing campaigns to some extent explain that recovery. Terrorist attacks raise peoples' travel risk perceptions and these are an important component of the travel decision process. Later in this research the travel risk perceptions of travellers is explored in general and their attitudes towards the particular risk of terrorism is assessed in relation to risk overall.

Chapter 4

Case studies (USA, Spain, UK)

Introduction

The previous chapter explored the effects of terrorist attacks on selected developing countries in order to put travel-risk into context and to look at the responses made by developing countries together with their relative recovery periods. This chapter switches attention to the effects of such incidents on well-established industrialised countries, using the USA, UK and Spain as case study destinations. All three countries were subjected to major terrorist acts including the 9/11 attacks in the USA, the Madrid Train bombings and the London Transport attacks of 7/7.

4.1 The case study selection

In addition to the three developing country case studies this research focuses on three industrialised country case studies. The case studies were selected from those industrialised tourist destinations that have been subjected to terrorist activities in recent times. The USA was subjected to a horrific act of terrorist violence resulting in the greatest number of casualties to date. The UK and Spain were also subjected to major terrorist incidents that involved their transport systems (subways, buses and trains) in and around their major or capital cities. Although one could argue that these acts of terrorism were not specifically aimed at the tourism industry *per se*, they all did involve the vital component of the tourism industry. Furthermore, the attacks in the USA, and the way in which they were carried out, have changed the air travel industry for the foreseeable future. Check-in times are now quite detailed, items that passengers can take with them are highly restricted, flight deck doors are now locked in flight and even the design of aircraft has been modified to mitigate the risks that were exposed as a result of the attacks.

Table 4.1 shows the GDP, Tourism Receipts, the level of External Debt and the total Exports for the three selected case study areas.

Table 4.1 Case studies data profile

	Years	USA	Spain	UK
GDP	2004	11.7 T	1.0	2.1 T
	2005	12.4T	1.1	2.2 T
Tourism receipts	2005	81680MUS$	47891mUS$	30669 mUS$
Tourism receipts/ GDP	2005	0.006	0.043	0.013
Present External Debt	2004	-----	----	---
	2005	-----	----	----
Export	2004	N/A	25.7	24.7 T
	2005	N/A		N/A
Income Level		High Income	High Income	High Income

Source: Adapted World Bank (2007)

In terms of developed countries dependent upon tourism and subjected to terrorist activities, there was not a wide range of examples to choose from. Table 3.7 in the previous chapter listed the World Bank indices of political stability and control of corruption for all six selected case study countries. It can be recalled that the three industrialised countries were considered to have much greater political stability and much lower levels of corruption than their developing country counterparts. In terms of terrorist attacks on industrialised countries, Table 4.2 outlines the major events of recent times. It can be seen that in addition to the three countries selected as case studies, only Finland and Greece were major targets of terrorists. However, in terms of the scale of attacks only the USA, UK and Spain were of such significance to be included in this study.

Table 4.2 Terrorist attacks resulting in casualties, developed countries, since 2000.

Country	Year	Terrorism attacks
Finland	2002	Myyrmanni bombing in shopping mall at Vantaa, Finland. Killing seven and injuring 50
Greece	2000	a British Defense Attaché, was assassinated by Revolutionary Organization 17 November in Athens
USA	2001	killed 2,986 in a series of hijacked airliner crashes into two U.S. landmarks: the World Trade Center in New York City, New York, and The Pentagon in Arlington, Virginia. A fourth plane, originally intended to hit an unknown, but likely prominent, Washington, D.C. target, crashes in Somerset County, Pennsylvania, after an apparent revolt against the hijackers by the plane's passengers;
Spain	2004	Coordinated bombing of commuter trains in Madrid, Spain, kills 191 people and injures more than 1,500.
UK	2005	Bombs explode on one double-decker bus and three London Underground trains, killing 56 people and injuring over 700

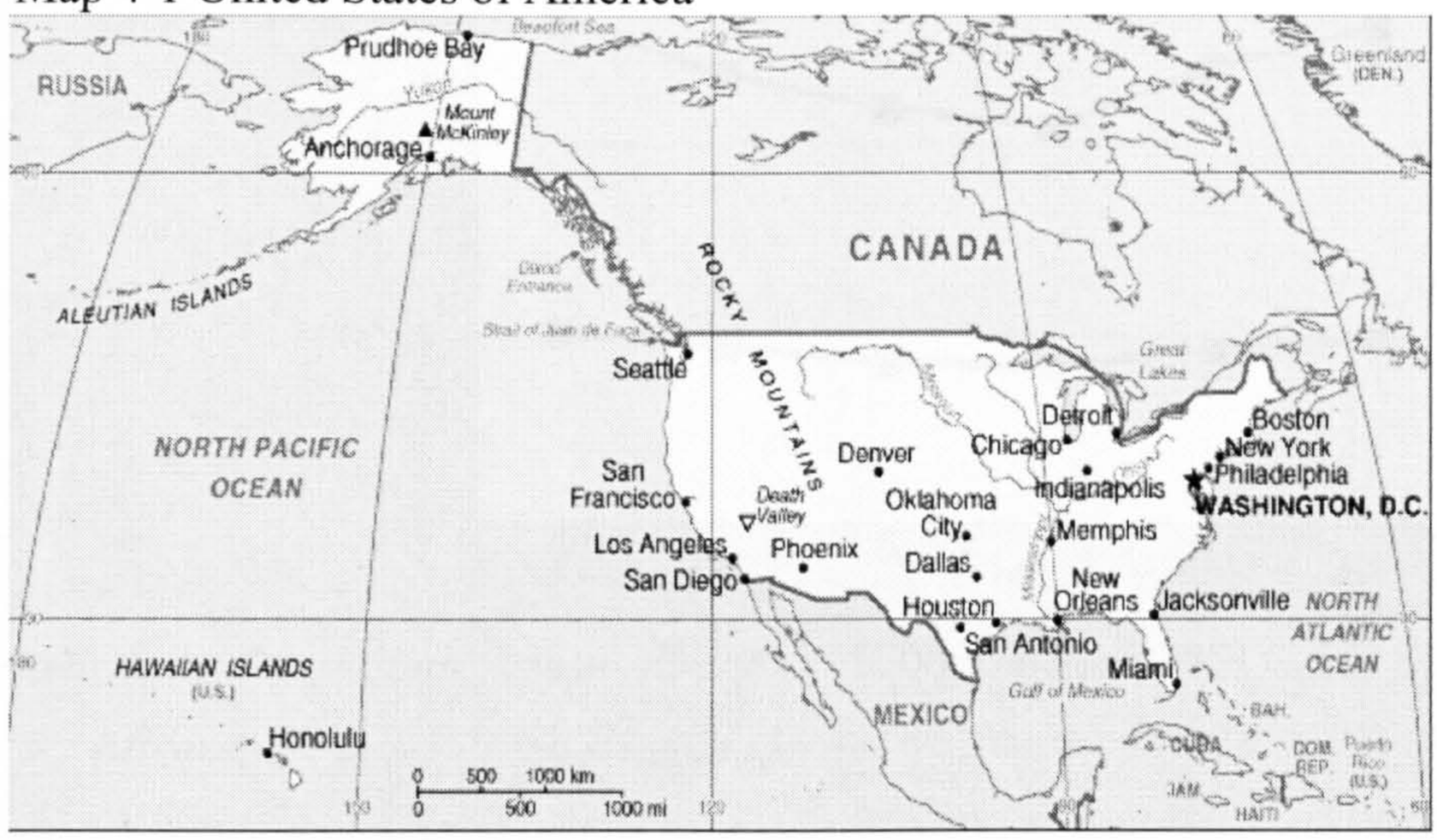
Source: adapted from fox news and BBC news

4.2 The United States of America

The United States of America is located in North America, bordering both the North Atlantic Ocean and the North Pacific Ocean, between Canada and Mexico. Britain's American colonies broke with the mother country in 1776 and were recognized as the new nation of the United States of America (see Map 4-1) following the Treaty of Paris in 1783. During the 19th and 20th centuries, 37 new states were added to the original 13 as the nation expanded across the North American continent and acquired a number of overseas possessions. The two most traumatic experiences in the nation's history were the Civil War (1861-65) and the Great Depression of the 1930s. Buoyed by victories in World Wars I and II and the end of the Cold War in 1991, the US remains the world's most powerful nation state. The economy is marked by steady

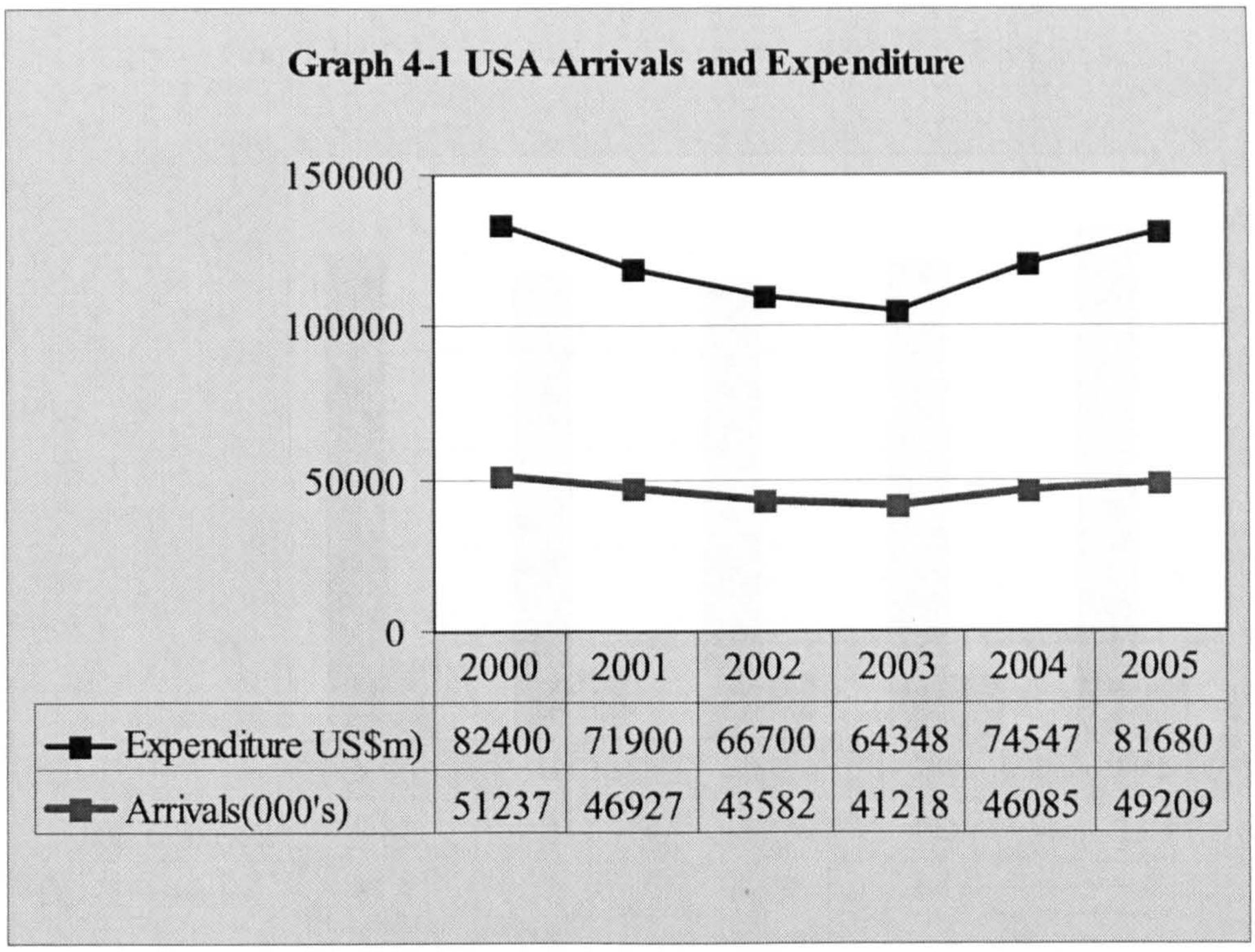
growth, low unemployment and inflation, and rapid advances in technology (CIA, 2005).

Map 4-1 United States of America



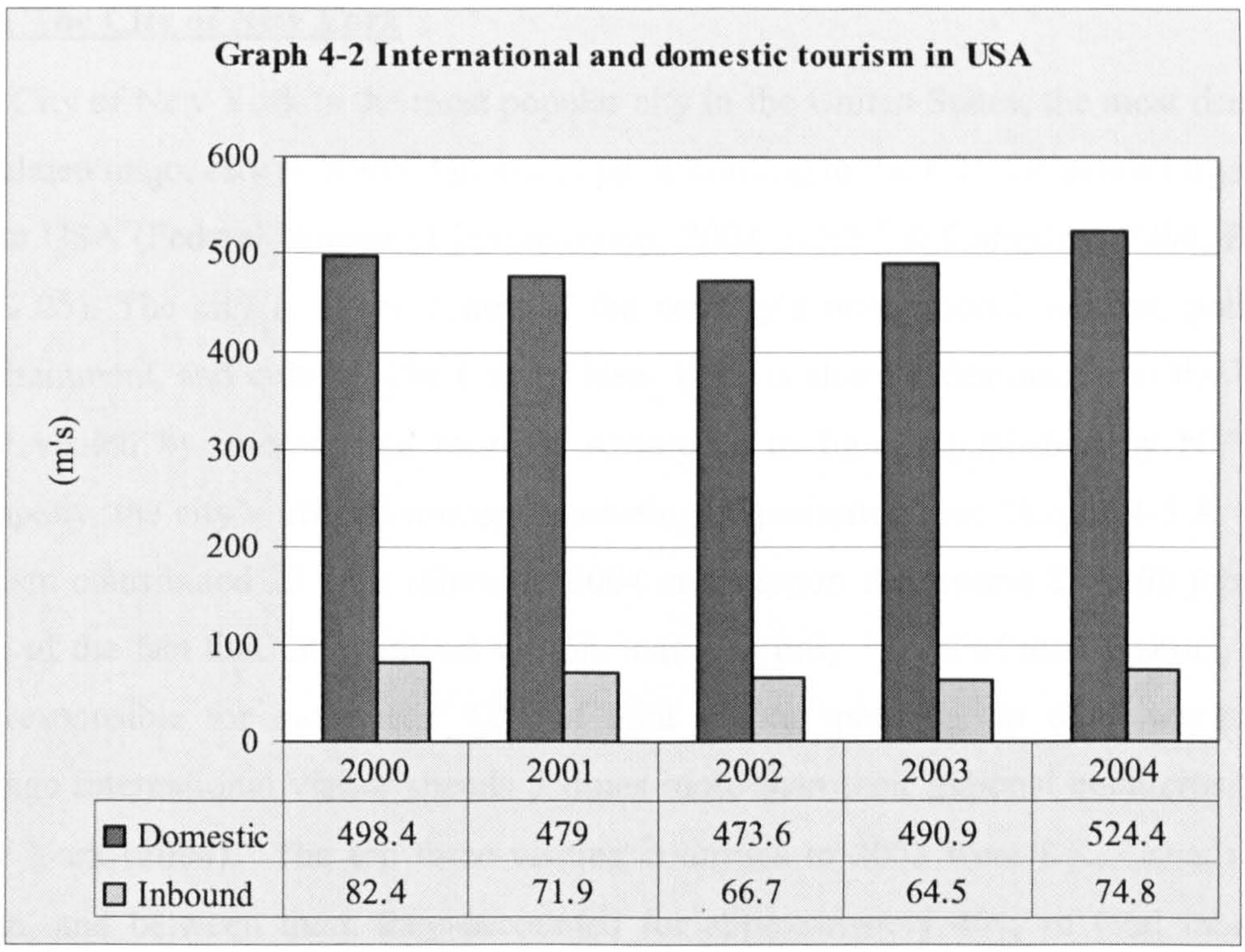
Source: from CIA (2005)

The USA is one of the world's most popular long-haul tourism destinations. It ranked first in terms of tourism receipts and third after France and Spain with respect to the number of international visitors in 2003 (see Graph 4-1). Travel and tourism is a 1.3 US$ trillion industry in the United States (2004) and one of America's largest employers (TIA.org).



Source: adapted from UNWTO, 2005 and WCTC (2006)

To put the industry into context, in spite of the effects of 9/11, the tourism industry in the USA in 2004 received more than 599.2 US$ billion from domestic and international travellers (excluding international passenger fares). Although the industry is dominated by domestic tourism, some 94 US$ billion was generated by international travellers (see Graph 4-2) making tourism the second largest services export industry in the United States. The travel expenditures, in turn, directly generated more than 7.3 million jobs with 163.3 US$ billion in payroll income for Americans and resulted in 99.4 US$ billion tax revenue for federal, state and local governments (tia.org, 2005).



Source: adapted from UNWTO and tia.org

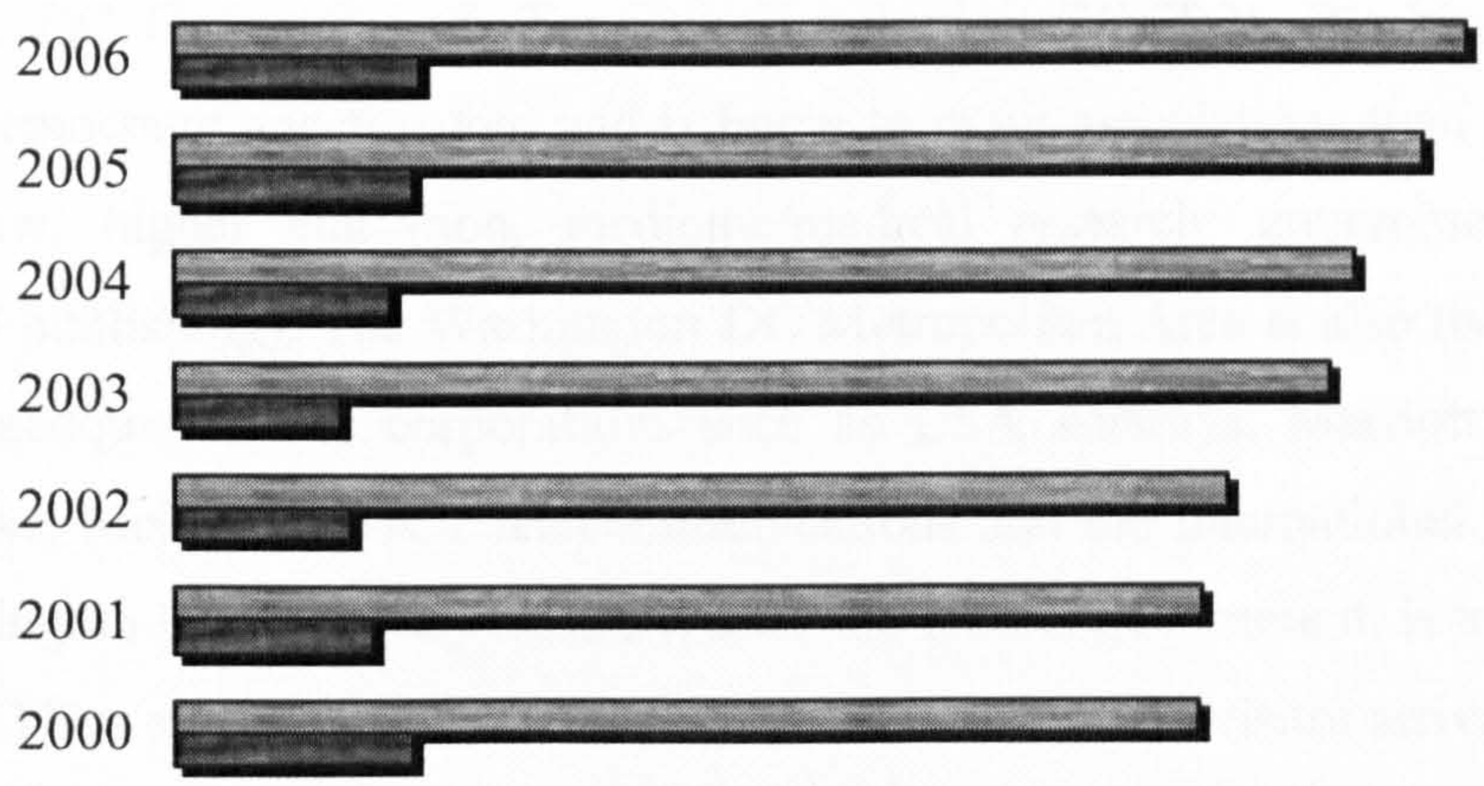
The USA had over 51 million international visitors in 2000 (see Graph 4-1), the visitor numbers decreased in 2001 to 46 million (a fall of just over 8%), but there was a slight increase in the first three quarters of 2001, with the major shortfall being generated in the last quarter following the attack. The number of visitors continued to decrease in 2002 with only 41 million visitors in 2003, which is around 20% less than year 2000. The decline in 2003 would not have been helped by the effects of SARS and the war in Iraq. Visitor numbers started to recover in 2004, increasing by around 6 million but still 10% less than the 2000 figures. In 2005 visitor numbers had increased by a further 7% over the year resulting in 46.1 million, which is still below the figure of 51.2 million recorded in 2000.

Visitor spending in the USA also fell by 12% in 2001 and was down by 19% in 2002. The downward trend continued into 2003, with a further drop of 3% over the year 2002. Even 4 years after the attacks expenditure was still below the 2000 level.

4.2.1 The City of New York

The City of New York is the most popular city in the United States, the most densely populated major city in North America, and, according to the FBI, the safest large city in the USA (Federal Bureau of Investigation, 2004 in NYC& Company, 2004, BBC, 13.11.05). The city is at the centre of the country's international finance, politics, entertainment, and culture. The City of New York is also the destination in the USA most visited by international tourists. According to figures published by NYC & Company, the city's official tourism marketing organisation (see Graphs 4-3 & 4-4), tourism contributed 23 US$ billion in 2004 and support for around 250,000 jobs. In spite of the fact that international visitors made up only 15.5% of total visitors, they are responsible for more than 42% of total visitor spending. In other words the average international visitor spends 5 times more than their national counterparts in New York (2004). The top three visiting countries in 2003 were UK, Canada and Japan, and between them they accounted for approximately 40% of total inbound visitors to New York. It is important to understand the characteristics of tourism to a destination as this may help inform the expected response and result because of a major terrorist incident.

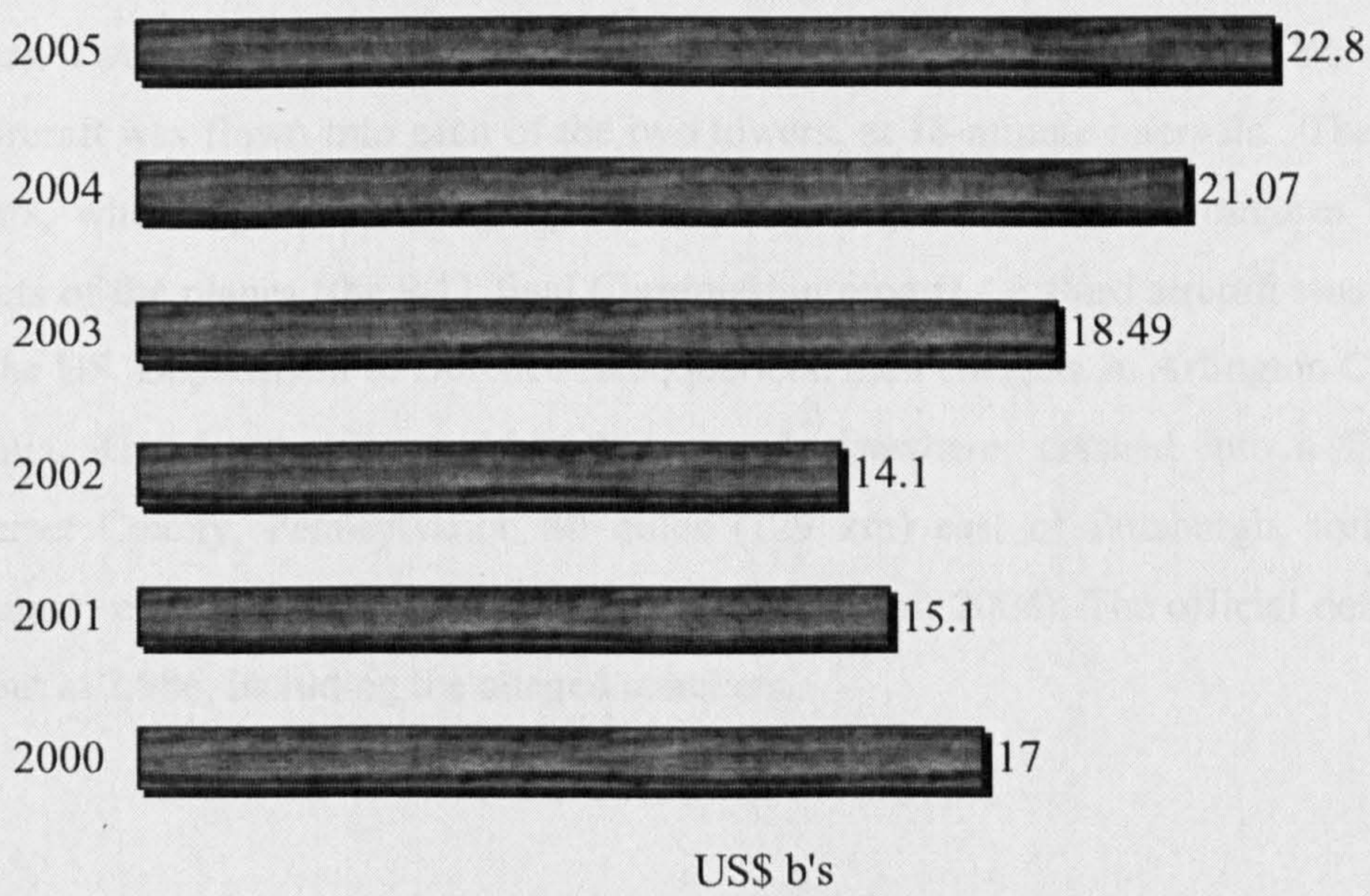
Graph 4-3 International and Domestic visitors to New York 2000-2006



	2000	2001	2002	2003	2004	2005	2006
Domestic	29.4	29.5	30.2	33.03	33.8	35.8	37
Internationa	6.8	5.7	5.1	4.8	6.2	6.8	7

Source: adapted from nycvist.com

Graph 4-4 Direct visitor spending in New York 2000-2005



Source: adapted from adapted from nycvisit.com

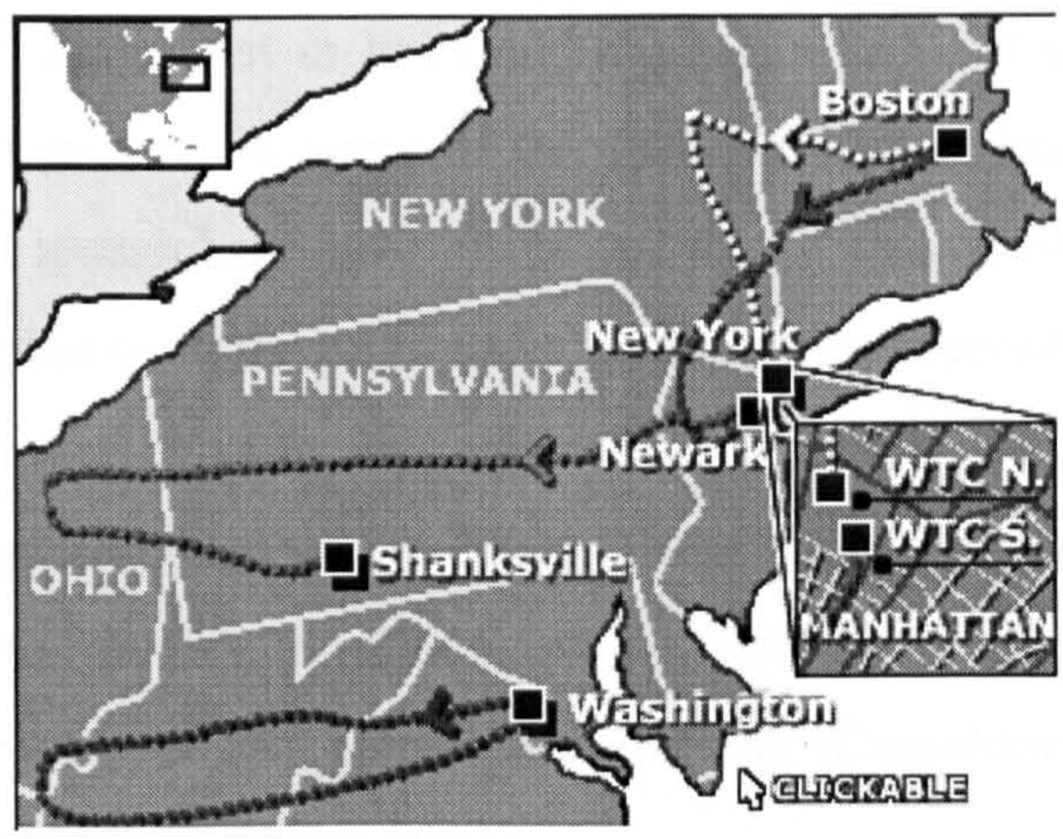
4.2.2 The City of Washington

The city of Washington is the United State's capital city. According to the Washington, DC Convention & Tourism Corporation (WCTC), Washington is a symbol of democracy and freedom and is home to more associations than any other US city (law, higher education, medicine/medical research; government-related research and publishing). The Washington DC Metropolitan Area is also the home to the world headquarters for corporations such as USA Airways, Marriott, Amtrak, Gannett News, Mobil Oil, MCT telecommunications and the International Monetary Fund. Washington DC's primary industry, after the federal government, is tourism. It ranked 8th in USA cities, in terms of the number of international visitor arrivals and its market share of total visitors was 4.8% in 2003. The city's tourism industry generates more than 10 US$ billion in direct spending each year and sustains 260,000 jobs (WCTC, 2006).

4.2.3 The 9/11 attacks

On September the 11th, the largest and most devastating suicide attack ever was launched on the USA. Nineteen men concurrently hijacked four domestic commercial airlines. Two were flown into the World Trade Center in Manhattan, New York City. An aircraft was flown into each of the two towers, at 18-minute intervals. The Twin Towers, where up to 50,000 people worked, collapsed within 90 minutes of the impacts of the planes (the 9/11 final Commission report). A third aircraft was flown into the US. Department of Defence Headquarters, the Pentagon, in Arlington County, Virginia. The fourth plane, although targeted elsewhere, crashed into a field in Somerset County, Pennsylvania, 80 miles (129 km) east of Pittsburgh, following passenger resistance (the 9/11 final Commission report, 2004). The official death toll was put at 2,986, including the alleged attackers.

Map 4-2 Locations of the attacks



Source: BBC

Shortly after the attacks, and following a brief period of confusion when it was thought that the Democratic Front for the Liberation of Palestine, may have been responsible, the USA Government declared that the Saudi dissident and Islamic militant Osama bin Laden - who is based in Afghanistan - may have been responsible (BBC, 9.11.01). In spite of denials in the immediate aftermath of the attacks, Osama bin Laden's implication in the events seemed to have been validated when U.S military sources (November 2001) recovered a vidotape from a destroyed house in Jalalabd, Afganistan which showed Osma bin- Laden admitting to planning the attacks. However there have been conspiracy and counter conspiracy theories in abundance since that time.

In 2004, the U.S. Government Commission investigating the attacks officially concluded that the attacks were conceived and implemented by al-Qaeda operatives. According to the 9/11 Commission report in 2004, all 19 hijackers were Sunny Islamists terrorists and members of the al-Qaeda terrorist organization, based in Afghanistan, and led by Osama bin Laden. The commission's final report also offered new evidence of increased contact between Iran and al-Qaeda. The report contains information about how several of the 9/11 hijackers passed through Iran and indicates that officials in Iran did not place entry stamps in their passports. However, according to the report, there is no evidence that Iran was aware of the actual 9/11 plot. Iran has since implemented several widely publicized efforts to shutdown al-Qaeda cells operating within the country.

4.2.4 The impact of the attacks

Apart from the immediate cost in lives and capital, a terrorist attack causes further losses, perhaps even greater, in terms of the fear and loss of business that terrorism instils. A number of researchers have examined the perceived risk of terrorism after 9/11 , distinguishing between the political effects of the perceived terrorist risks to the nation and the perceived risks to oneself and one's family (Davis and Silver 2002; Huddy,Feldman, Capelos, and Provost 2002). These effects are in line with the central objective of terrorism, namely to induce fear and anxiety in people through focused acts of brutality and violence that gain broad publicity (Crenshaw 1986; Jacobson and Bar-Tal 1995; Long 1990; Wardlaw 1982).

Furthermore, research conducted after 9/11 demonstrated that such a threat to society tends to enhance support for greater levels of security that potentially damages civil liberties (Huddym, Feldman, Capelos, and Provost 2002). Whereas the political effects of personal threat may be relatively weak or nonexistent, personal threat tends to change travel-risk perceptions towards risk for, say air travel. According to Norris et al. (2003), research suggested that Americans put aside their personal fears after 9/11, and supported anti-terrorism measures to counteract the perceived threat of terrorism to the nation as a whole.

Health researchers also found high levels of depression, anxiety, and post-traumatic stress syndrome among American adults and children after the attacks (Schuster et al. (2001); Galea et al. (2002); Silver et al.2002). To answer the question to what extent were Americans psychologically affected by the attacks of 9/11, Norris et al. (2003) conducted a survey which encompassed four areas for fear and anxiety, and three on depression and related somatic symptoms. They contrasted the psychological reactions with the perceived risk of future terrorist attacks and found that there was a marked change in the perception about the possibility of future attacks with around 86% of participants reporting that they were very or somewhat concerned about another attack. They also found that proximity to the attacks is an important determinant of fear and anxiety, with respondents who knew a victim of the attacks displaying higher levels of fear. Individuals who lived in the Northeast of the USA were found to be more likely than other Americans to feel fear and report symptoms

of depression, but did not perceive any higher level of risk to the nation as whole Norris et al. (2003).

The indirect costs associated with the 9/11 terrorist attacks varied across sectors, countries and time. Some sectors are more vulnerable to attacks than others and consequently suffer a higher burden of the costs. The attacks were associated with an enormous negative effect on tourism demand world wide, and a devastating impact on the tourism industry in the USA. A wide range of sectors, airlines, tour operators, theme parks and attractions, car rentals and hotel companies, to name just a few, all reported drastic cancellations of reservations and declines in forward bookings. At the time there were questions as to whether the industry could ever completely recover from such a massive blow and if so, how long would it take (Pizam and Fleischer 2001). However, much of the post 9/11 downturn had been brewing prior to the attacks.

In late 2000, there was a downturn in the global economy in general and the US economy in particular. A mild recovery was underway in September 2001 when the 9/11 attacks were launched (BBC, 18, 10.02). The immediate, acute impact of the shock to the transportation system was significant and the airline industry in the USA suffered more than any other in the aftermath of the terrorist attacks. Terror attacks in the USA specifically changed the demand for aviation (Darkos, 2004). Changed risk perceptions by consumers reduced demand for air travel and for complementary hotel accommodation. Although the impact of the attacks varied by airline (Carter and Simkins, 2002), the pressure on the sector as a whole increased significantly due to the attacks.

According to a report by Hanbury (2004) 'Washington and New York City were rocked to the economic core by the events of 9/11'. Although the loss of life and physical damage were more in New York, the attack had longer and deeper negative effects on the city of Washington (Hanburry in GWBusiness news).

The airlines were hurt from two different directions. On the demand side there was a drastic reduction in the demand for seats whereas at the same time there was the additional costs as a result of the need to deploy enhanced levels of security. There

was some light relief, however, in the form of a reduction in fuel costs as the fall in demand for aviation fuel reduced price levels. In effect the 9/11 attacks turned what was going to be a bad year for the airline industry into a disastrous one, Gahan in BBC (18.10.02). According to Gaillard director of IATA (2002, in BBC 13.08.02) the airline lost after 9/11 as much as they had ever made since the Wright Brothers started flying in 1903'. Bisignani, general director of IATA, characterised the years 2001 and 2002 as being like 'a boxer who gets hit harder after every knockdown'. According to IATA the global air industry lost around $25 billion profit in 2000 and 2001.

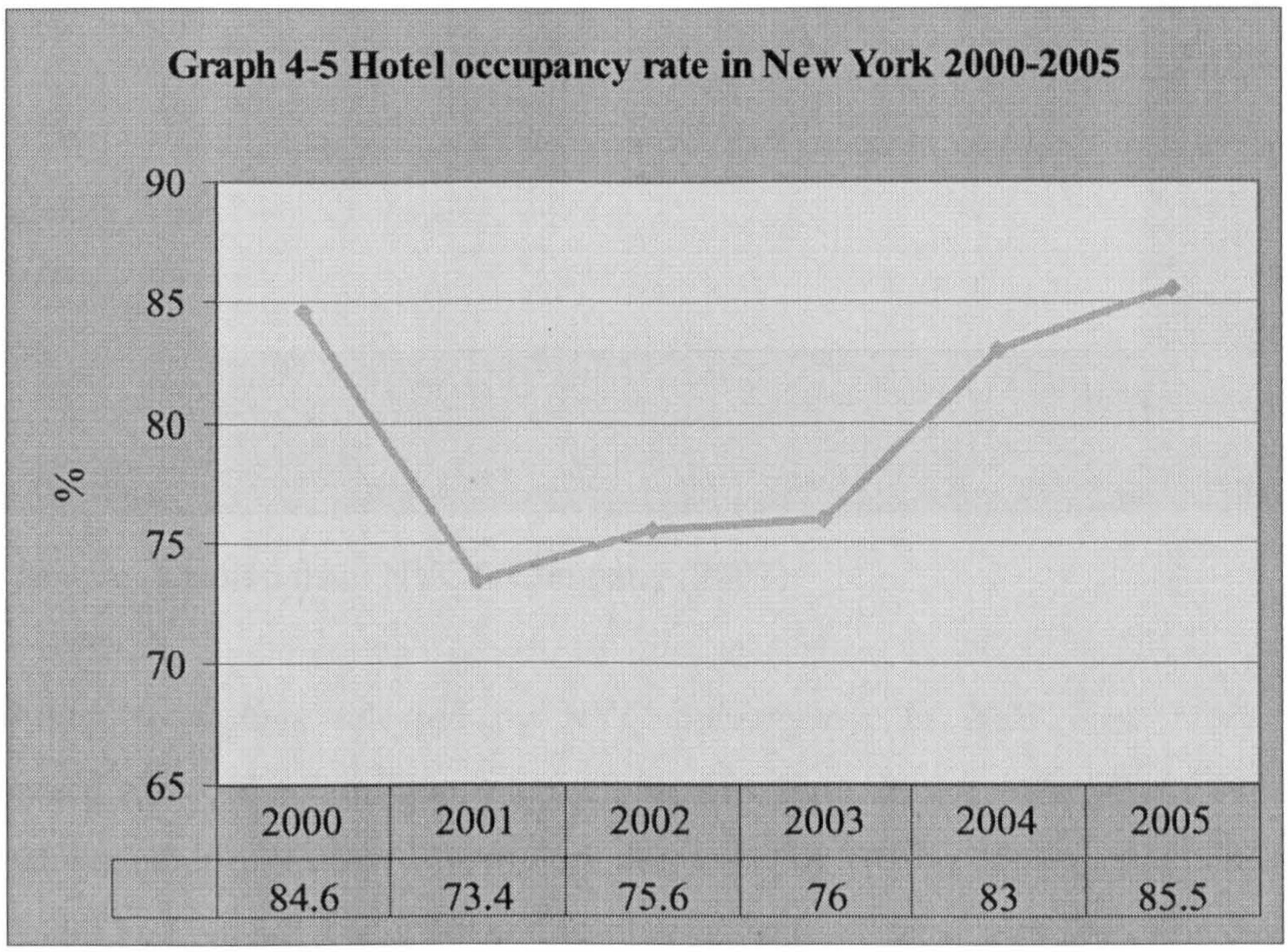
On the surface the industry seemed to rebound in 2003, to reaching the January 2001 levels of activity, but this long-awaited recovery, which was clouded by the crisis in Iraq, tended to mask several changing features of the airline industry (BBC, TIA.org, and IATA). Not least of which were the losses by scheduled airlines being offset by the rising success of low-cost airlines in particular Ryan Air, Easy Jet in Europe and JetBlue in the USA (Bisignani, 2002).

Bruck and Wickstrom (2004) suggested that state responses to terror are not useful when terror induces significant and permanent changes in demand patterns. As a result of loss, airlines responded by cutting tens of thousands of jobs in the USA and around the world. American Airlines shed 20,000 jobs and cut 20 % of its scheduled flights, while United Airlines shed 20,000 jobs and cut 26% of its scheduled flights. By November 2001, within the United States alone, some 116,000 jobs had been lost in the airline industry (Beirmann, 2003). However, many commentators felt that the events of 9/11 were simply being used as an excuse to make the cost-saving cuts that they would have had to do anyway (BBC, 13.08.02).

The 9/11 attacks were also associated with a drop in New York hotel occupancy rates which fell from 84.6% in 2000 to 73.4% in 2001 (see graph 4-5). However, the hotel industry seemed to be more buoyant than its airline counterpart and the pre-9/11 occupancy rates were restored as early as 2003 and exceeded that level by 2005.

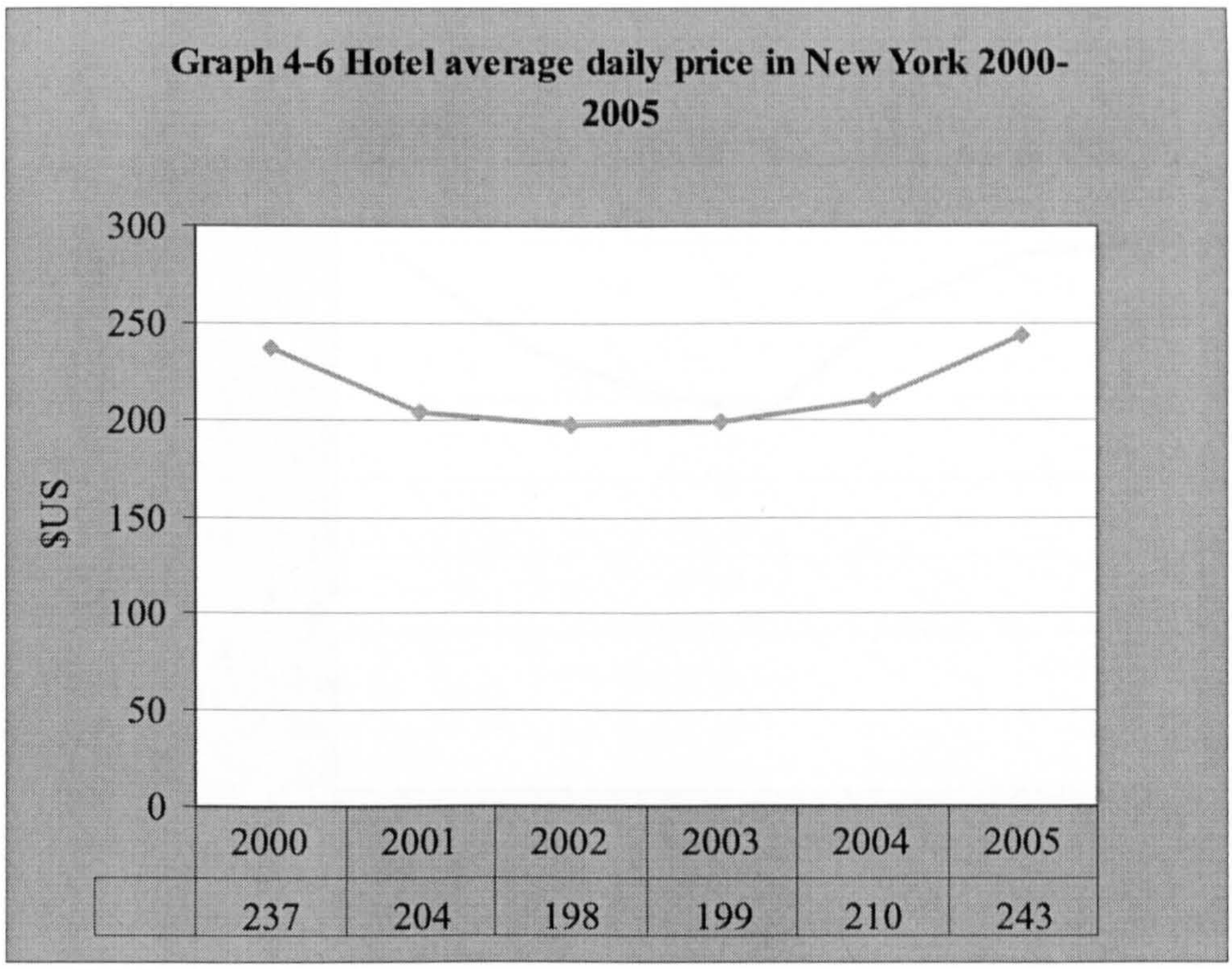
Occupancy rates alone do not provide a full picture as hotels dropped their prices to keep occupancy levels up as far as possible. This was evident in the fall in the

average daily rate (see graph 4-6) from 237 US$ to 204 US$ in 2001. Further falls in the average daily rates were experienced in 2002 where the rate slumped to 198 US$ and only marginally recovered in 2003 to $199 (which was in fact a further real rate reductions). For New York City's hotel industry 2004 was a relatively a strong year. Hotel occupancy levels were back up to 83% and the average daily rate bounced back up to $216.



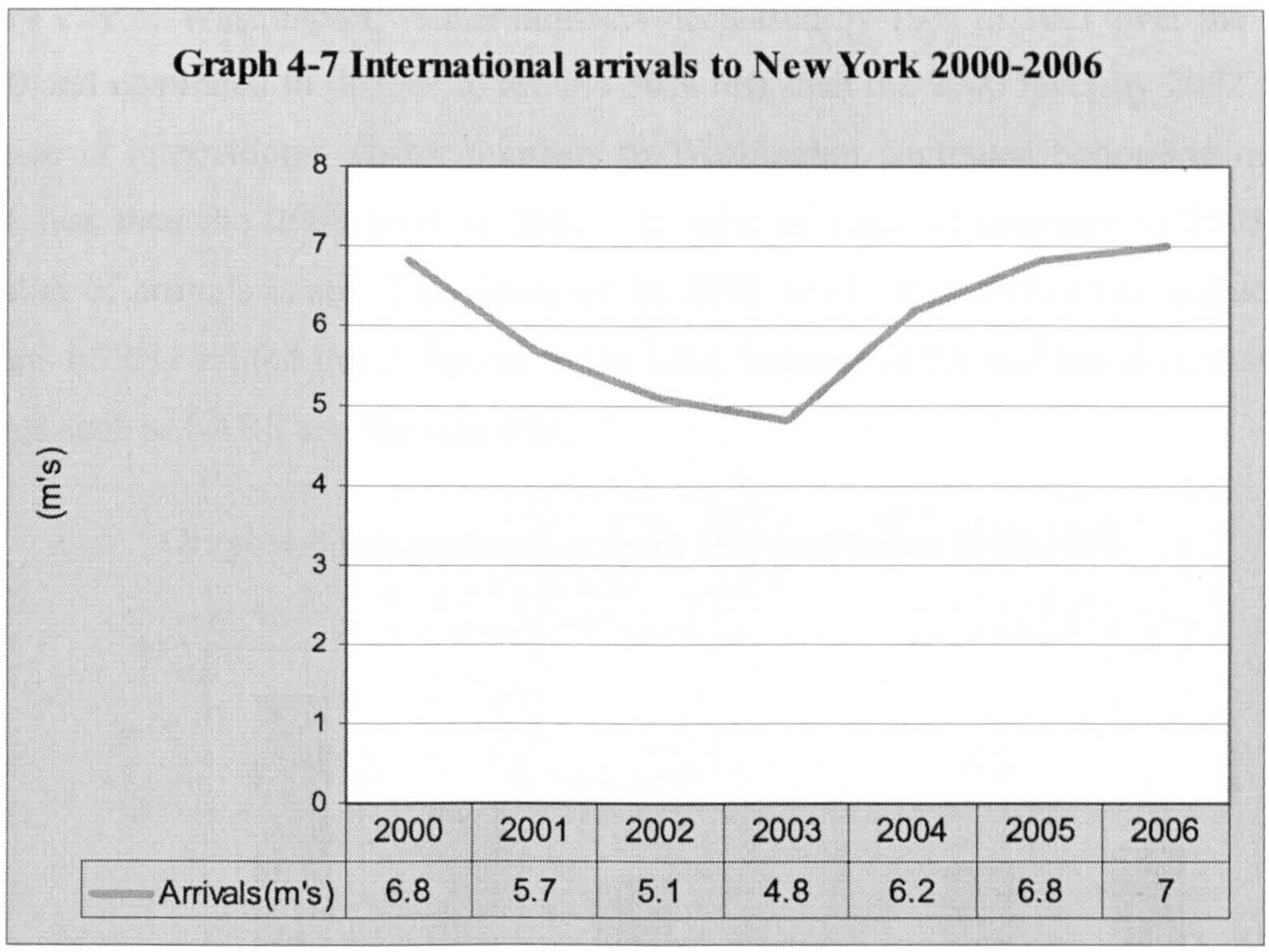
Source: adapted from NYC& Company (2005)

In 2005 both hotel occupancy rates and the average daily rates reached a record level compared with the three previous years, nevertheless it was not significantly higher than those levels enjoyed in 2000.



Source: adapted from NYC& Company (2007)

According to figures released by NYC &Company, in 2000 New York City welcomed a record 6.8 million international travellers. In the wake of the attack in 2001 the number of visitor to New York decreased by 16% in 2001 and 25% over the year 2000 and the arrivals continued to drop in 2003 where it was 29% less than the number of arrivals in 2001. The onslaught of the war in Iraq may well have contributed to this decline as well as the 9/11 attack. In 2005(4 years after the attacks) the arrivals reached the previous record total enjoyed in 2000 and the numbers have continued to grow in 2006.

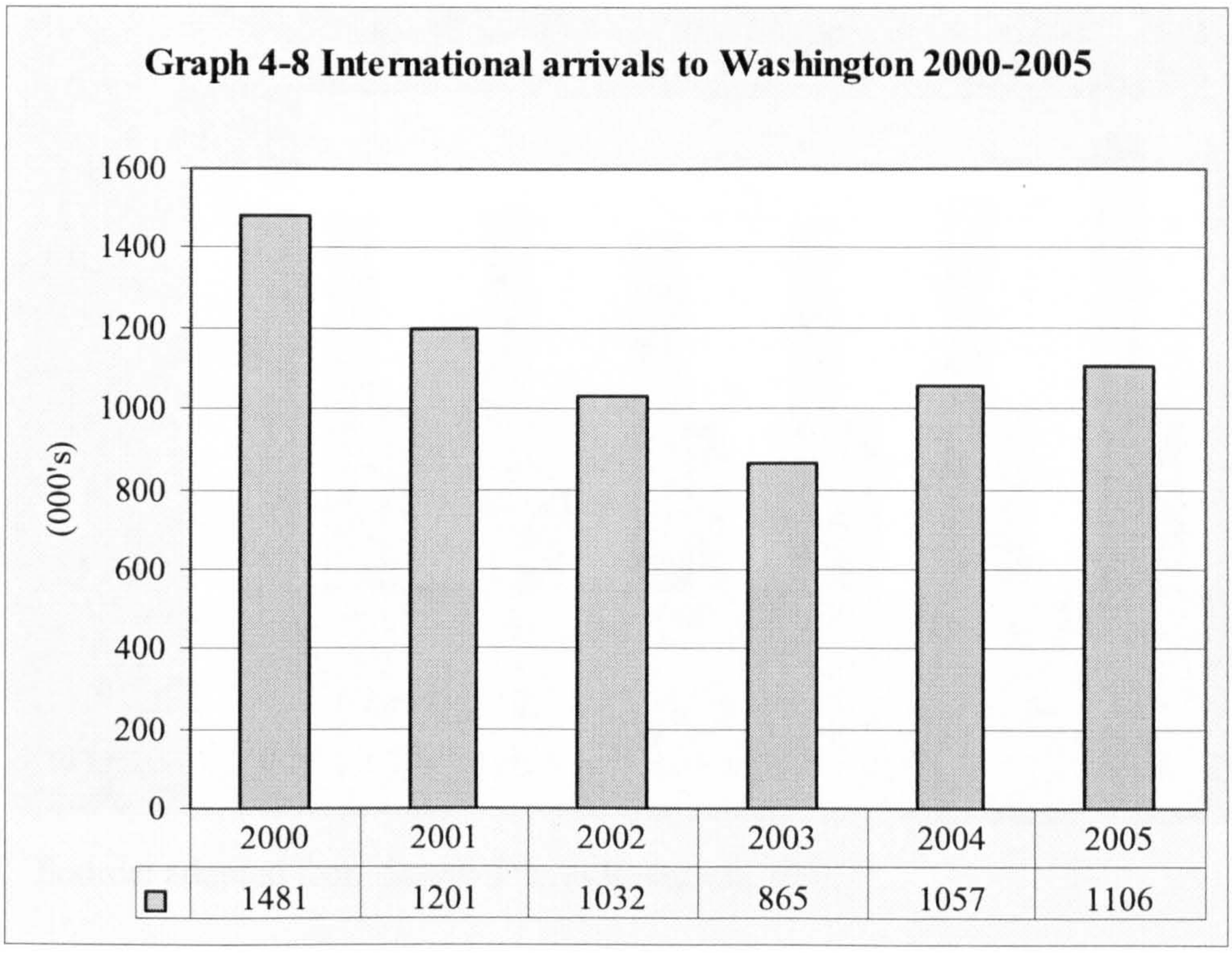


Source: adapted from NYC& Company (2007)

There is no figure available to show the international visitor spending in New York. However, New York and Company provided figures for both domestic and international visitors (graph 4-4). Spending by visitor to New York took two years to reach and surpass the amount of spending experienced in 2000 and continued the growth. The shorter period for the recovery is perhaps a result of a switch to a greater proportion of domestic travellers and this may help explain some of the decline in average room rates where some domestic visitors seek lower quality accommodation than that associated with international travellers.

Overall, New York City remained the number one destination in the USA for overseas visitors. The city's major international feeder markets showed strong and sustained rates of increase in 2004 including a 12% increase from the UK, a 15% increase from Germany, a 15% increase from France and an 18% increase from Italy. Interestingly, the recovery period in New York was quicker than in the USA overall (see Graph 4-1, 4-4 and 4-7).

In the city of Washington, visitor numbers decreased by 19% in 2001 over the year 2000 and continued to decline to around 30% less than the 2000 level by 2002. The decline in international visitor numbers to Washington continued bottoming out at 42% less than the 2000 level in 2003. In spite of signs of recovery in 2005 the number of arrivals is still 25% down on its 2000 level. It is difficult to isolate the effects of 9/11 on the travel figures to the USA because of the additional impacts of events such as SARS and the Iraq war.



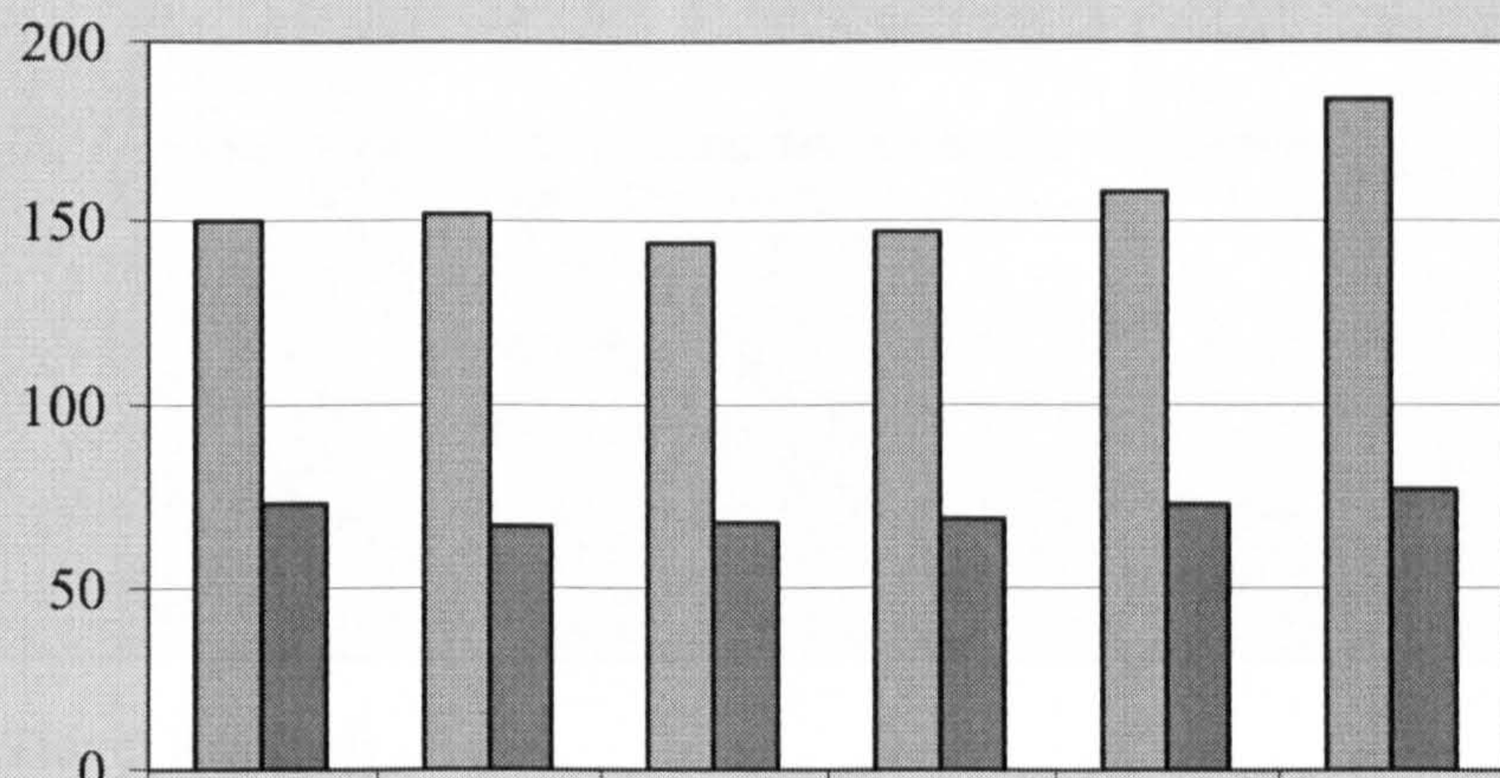
Source: Tourism Industries, International Trade Administration, US Department of Commerce.

According to a survey by Yu and Stafford (2005) in the Washington, D.C. Metro Area, namely Washington D.C., the Northern Virginia and suburban hotel industry was hardest hit during the last four months of 2001 in Washington.

When looking at the hotel industry it is more difficult to get a true picture of the impact of 9/11. As Graph 4-9 shows the average room price in 2001 was higher than 2000. This might be as a result strong growth for the first 3 quarters of the year. The impact of 9/11 can be seen clearly in the 2002 and 2003 figures, where average rates dropped by 5% and 1.8%, respectively. However, both average daily rates and

occupancy levels have increased since then, recovering strongly in 2004 and 2005 when in the latter year the average rate was up 25% on the 2000 rate. This is clearly a different picture to that of New York and may in part be a result of the different composition of visitors travelling to Washington with the latter experiencing a higher proportion of business visitors than the former.

Graph 4-9 Hotel Occupancy and Average room rate Washington through June 2005

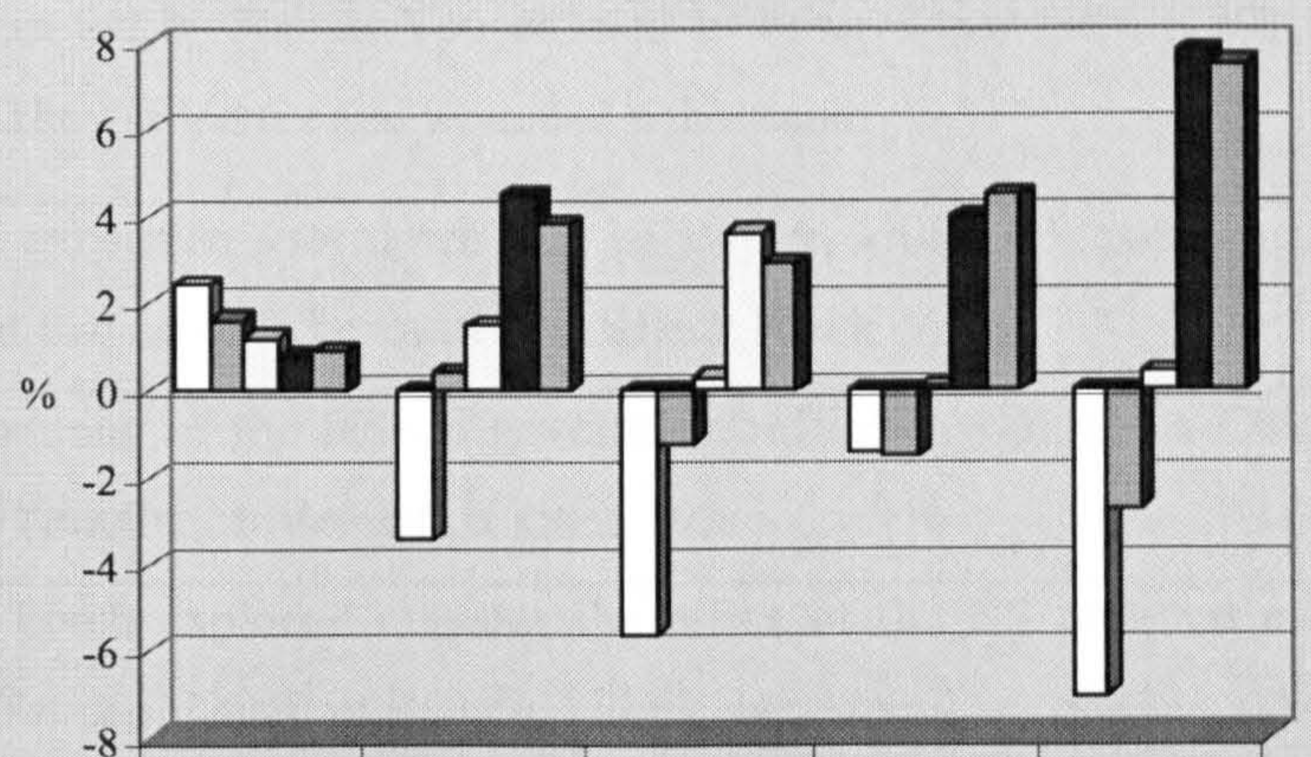


	2000	2001	2002	2003	2004	2005
A.rate $	149.95	152.22	144.07	147.26	158.19	183.94
Ocupancy %	72.7	66.4	67.2	69	72.4	76.4

Source: adapted from Smith Travel Research, WCTC

Graph 4-10 shows the year-on-year performance indicators for hotel performance. However, apart from the supply side that shows a steady decrease from 2001 to 2004 and slight increase of %0.1 in 2005, the demand, ADR (average daily rate) and RevPAR (revenue per average room) all show a relative growth, and occupancy rate shows a stable growth while it increased in 2005.

Graph 4-10 Change over prior year (hotel performances)



	Supply	Demand	Occupancy	ADR	RevPAR
2001	2.4	-3.4	-5.6	-1.4	-7
2002	1.6	0.4	-1.2	-1.5	-2.7
2003	1.2	1.5	0.3	0.1	0.4
2004	0.8	4.5	3.6	4	7.8
2005	0.9	3.8	2.9	4.5	7.5

Source: Smith Travel Research

4.2.5 The Response to the 9/11 attacks

The immediate government responses to the September 11 attacks included law enforcement activity, disaster relief and security response (Blake and Sinclair, 2002). Until 9/11, acts of anti-government terrorism on US soil, whether politically, ideologically or religiously motivated, were a rarity (see table 4-3). Terrorism was perceived to pose greater threats for Americans when they were outside the USA rather than on home soil.

Table 4-3 Attacks against target since 1990

Time	Attacks
02.1993	A group led by Ramzi Yousef tried to bring down the UNWTO with a truck bomb. They killed six and wounded a thousand.
10.1993	Somali tribesmen shot down U.S helicopter, killing 18 and wounding 73 in an incident that came to be known as 2Black Hawk down.
4.1995	The bombing of the federal government office in Oklahoma City by American citizen Timothy McVeigh that killed 193.
11.1995	A car bomb exploded outsides the office of the US program manager for the Saudi National Guard in Riyadh, killing five Americans and two others.
06.1996	A truck bomb demolished the Khobar towers apartment complex in Dhahran, Saudi Arabia, killing 19 U.S service members and wounding hundreds.
08.1998	Bin Ladin's group, al Qaeda, carried out near simultaneous truck bomb attacks on the U.S. embassies in Nairobi, Kenya, and Dar es Salaam, Tanzania. The attacks killed 224 people, including 12 Americans and wounded thousands more.
10.2000	An al Qaeda team in Aden, Yemen, used a motorboat filled with explosive to blow a hole in the side of a destroyer, the USS Cole, almost sinking the vessel and killing 17 American sailors.

Source: http://www.terrorism.com/modules.php?op=modload&name=Attacks&file=index

There was some pressure on relations within the USA and in spite of an appeal by President Bush that Americans should "pull together in the aftermath of the attacks" and that "*we should not hold one who is a Muslim responsible for an act of terror*" there were many instances of internal friction. In the seven days following 9/11, Arabs and South American citizens reported 645 "bias incident and hate crimes" to the Council on American-Islamic-Relation (CAIR). Six months after the event this figure totalled 1717. Cainkar (2004) argued that federal government policies, most of which were never subject to a congressional vote, targeted millions of people on the basis of religion, country of birth or ethnicity, in response to the action of a small number who shared their ascribed characteristics. Nevertheless, none of the perpetrators were home grown; they all visited the U.S.A with an agenda.

When looking at the response to an attack on the scale of 9/11, it is worthwhile looking at the response made by the government to ensure that similar events will not happen and to try and mitigate some of the damage done to risk perceptions of

travellers. Following that it is worthwhile examining the industry response to see how they might be able to recover some of the lost ground in the market place. Immediately following the 9/11 attack the following security measures were brought into action (BBC, 11.09.01):

- All government buildings in the country were evacuated, including the White House and Congress
- Lower Manhattan was evacuated and the National Guard brought in
- All commercial flights to and from the US were suspended until noon on Wednesday (1600 GMT)
- Air force fighters were ordered to attack any suspicious aircraft flying in US airspace
- Seven US warships sailed towards New York, two aircraft- carriers to help in rescue efforts.

In the week after the 9/11, the focal point of the United States led coalition military response was Afghanistan in pursuit of al-Qaeda forces and to topple the Taliban Government for harbouring the terrorist organization. The US administration sought to enlist a broad coalition to strike at international terrorism, obtaining varying degrees of international support. The UK, continental Europe, Russia, Australia and Canada were fullsome in their support. In addition the USA sought support from Arab and non-Arab Islamic states as a means of demostrating that retaliation was not directed at Islam; besides, the Coalition needed the bases from which to attack the Talban (Beirmann, 2003). It is questionable whether this military stance reassures travellers or heightens their fear that this stance will ensure the USA will become subject to further attacks.

Further to the military action taken by the USA and its allies in trying to hunt down the alleged 9/11 perpetrators, many countries introduced tough anti-terrorism legislation and took action to cut off terrorist finances, including the freezing of bank accounts suspected of being used to fund terrorism. Again it is hard to determine whether such widescale action has a positive or negative effect, overall, on travellers' risk perceptions. Law enforcement and intelligence agencies stepped up cooperation

to arrest terrorist suspects and break up suspected terrorist cells around the world. However, the subsequent terrorist attacks (Bali Bombings, Madrid Attacks) showed that the action taken by the governments was insufficient. Burke (2004) suggests that

"Of course war on terror should have a military component. It is easy to underestimate the sheer efficacy of military power in achieving specific immediate goals. But if we are to win the battle against terrorism our strategy must be made broader and more sophisticated. We must eliminate our enemies without creating new ones. Military power must be only one tool among many, and a tool that is only rarely, and reluctantly, used. Currently military power is the default, the weapon of choice. In fact the greatest weapon available in the war on terrorism is the courage, decency, humor and integrity of the vast proportion of the word's 1.3 billion Muslims. It is this that, as Islamic terrorism grows more and more fragmented, we need most. There is indeed a battle between the West and men like bin Laden. But it is not a battle for global supremacy. It is a battle for hearts and minds".

From the perspective of a marketing response, the USA immediately embarked upon a new way of life, or, as the media described it, a new "new normality" (Chura, 2002; Stark, 2002). The terrorist attacks on the United States created a crisis in the tourism industry that proved challenging even to experienced managers of corporate communication.

Since September 11 the New York City Tourism Authority, as well as NYC& Company, have benefited greatly from the actions of Mayor Rudolph Giuliani in seeking to highlight tourism as a means of boosting the moral and economic viability of New York City. The Mayor's plea 5 days after the event to American and international visitors to show their support for New York by visiting, staying and spending was an effective call for solidarity. Giuliani's speech on 1st October to the UN General Assembly was especially powerful as it identified the attack on New York as an attack on the entire international community.

The NYC & Company, the official tourism marketing organization, has a membership of more than 1,800 businesses, including museums, hotels, restaurants, retail stores, theatres, tour organizations, and attractions. It has a current budget of $16 million, around half of which is contributed by the City of New York.

The NYC &Company and the city administration of New York actively sought to address safety and security concerns raised by the public and the travel industry.

Tactically, they focused on the domestic market as a main priority and the international market as a secondary priority. The city of New York attracts a large number of visitors from within the United States (see graph 3-8) although spending by international visitors is far greater. Beirmann (2003) argues that this focus on domestic rather than international visitors was a correct one. This could be because people feel that they are at less risk when travelling within their own region or country (an aspect that is examined later) or that the call for national unity was a persuasive one for the Americans.

In the wake of the 9/11 attacks the NYC & Company through its website included many promotions of restaurants, attractions, event and hotels. Paint the Town Red, White & Blue, and a new version of NYC & Company's popular Paint the Town Red winter celebration, began two months earlier in 2001 to add November and December to the usual months of January and February. For the first time, consumers were able to choose from "do it yourself" Paint the Town Red, White & Blue discounts at businesses throughout the city or they could opt for new, low-priced NYC Freedom Packages that combined hotel stays with Broadway shows, dining, cultural and sightseeing options as well as parking discounts. NYC& Company aimed to send an important message to people from across the nation and around the world that New York City was open for business and ready to welcome visitors back. Furthermore, Paint the Town Red; White & Blue included more than 350 special offers, exclusively for American Express Card members, which provided visitors with the option to create their own vacation experiences. Special offers and discounts included:

- Hotels, rate discounts and complimentary breakfast at more than 100 New York hotels from The Algonquin to the Waldorf-Astoria with rates starting as low as $69 per night
- Restaurants, Up to 20% discounts on lunch and/or dinner at city restaurants with cuisine ranging from classic American to Italian, Japanese, Brazilian, Mediterranean, South-western and Continental
- Retail stores (15% discounts and gifts with purchases)
- Theatre, discounts of up to 40% for Broadway and Off-Broadway shows

- 2-for-1 admission for New York residents to a host of museums, tours and visitor attractions when accompanied by a visitor.

An enhanced business information system was launched that provided better real-time information (Newswire) that was available to 95% of the world's retail travel agents. In essence, the campaign was one based on reassurances of safety and appeal to solidarity, backed by discounts and value-added incentives. The approach to international travellers included a combination of reassurance and incentives, but it needed to adopt a more subtle and varied approach in terms of psychological motivation. The extraordinary publicity given to the attack accompanying losses produced the kind of risk perceptions that people are likely carry with them into the future Viscusi et al. (2003).

For the city of Washington, DC the Convention & Tourism Corporation (WCTC) serves as the lead organization to manage and market Washington, DC as a premier global convention, tourism and special events destination. It was established just prior to the attacks, in April 2001 by merging the Washington, DC Convention and visitors Association and DC committee to promote Washington.

According to Hanbury (2004), the media constantly showed the powerful image of a burning Pentagon. At any turn it looked as if the US capital was under constant attack and a place of on-going international crisis. The series of terrorism warnings allowed the media to continue showing the image of 9/11 in Washington thereby underscoring the increased risk perceptions that were evident from the downturn in traffic.

To restore domestic traveller confidence, the marketing campaign "come, be inspired" targeted Americans. The WTCT did not have access to large public funding resource, but they tried to raise financial and in–kind resource from a wide range of public and private sources. The marketing campaign had two phases. The first was called 'Be a tourist in your home town' and was focused at the local level. Since the airport was closed and more importantly people had not resumed air travel, they attempted to attract people from more immediate local markets. The programme began in early October and lasted through December 2001. Furthermore, the

Washington restaurant week 'an idea borrowed from New York City, had more than 70 restaurants participating, providing substantial discounts.

There was criticism about the local response due to the lack of immediate action as their strategy was to wait until "rhetoric from federal officials was toned down and the American public became receptive to an invitation to visit Washington". The campaign launched late February was mostly in the form of TV service announcements but it also included a full range of marketing activities, newspaper, internet, direct mail, public relations, niche marketing and promotional support. 'The campaign's primary message was to remind American citizens and international visitors that Washington's artistic, cultural and historic institutions were open for business. The messages also carried with them a hook of defiance by suggesting that people could best show their patriotism and love for democracy by visiting the Capital, Hanbury (2004).

This was also combined with an aggressive public relations programme launched by the hotel industry in Washington (Fall and Massey 2005).

The sudden decline of hotel business forced hotel owners and managers to make hard decisions to conserve cash by reducing operation costs. The hardest decision was to reduce/lay off a significant number of the 75,000 hotel employees, (Schneider, 2001; Sheridan, 2001). On the issue of staff reduction, 72 (7%) of the Washington D.C. hotels were very actively involved in reducing staffing levels. Clearly, the terrorist attack had a particularly significant impact on hospitality employment in the capital city. To add to the lay-offs, the majority of hotels encouraged employees to make flexible use and/or mandated use of vacation time, personal leave, and sick leave.

The recovery strategies pursued collectively by the Washington D.C. tourism yielded positive results. The study by Yu et al. (2005) shows that recovery strategies clearly work (see Table 4-4). This is in spite of different hotel ownerships, affiliations, sizes and locations to stabilize business operations, amidst a series of subsequent bio-terrorism events, a weak economy, the Sniper rampage, SARS fears, a hurricane, one of the worst snowstorms of the century, the war on terrorism and the frequently heightened terror alert in 2002 and 2003.

Table 4-4 Stages of the crisis applied to the 9/11 terrorist attacks on Washington, 2001.

Crisis stages	9/11 terrorist attacks on Washington, D.C
Pre-crisis stage	Pre9/11.2001 Warning signs: Al-Qaeda operative learning to fly commercial jets in the US; chatter increased by Al-Qaeda sleeping cells; FBI lost track of suspected terrorist operatives.
Acute crisis stage	September 11- October,2001 Terrorist attack on the pentagon; making sure that that guests, employees and properties were safe; rescue and relief efforts to assist the injured and victim families, reassuring the public that D.C was open to business, making crucial decision to conserve cash and reallocate human resources.
Chronic crisis stage	November 2001-April 2002 Recovery marketing initiative: gradually targeting the local, regional, national and international markets; hotel occupancy returning to pre-crisis level.
Crisis resolution stage	Tourist business returning to normalcy since April, 2002.

Source: adapted from Yu et al. (2005)

The marketing response by the U.S.A, however, faced a relatively harder task in implanting a fully coordinated destination crisis marketing approach because it is one of the few countries in the world which lacks a centralised national tourism marketing authority. One of the key premises of having a strong and centralised national tourist marketing authority is to promote destination awareness. In a normal condition, destination-marketing procedures used by Visit USA and other marketing middle range source markets are normally highly effective. However, this effectiveness is largely based on the assumption of continuing high demand, which means participating principals and operators are willing to spend money to promote a strong and growing market. Once the market is threatened and the private sector has reduced

financial and other marketing resources for promotional activity, then privatising destination marketing become less viable (Beirmann, 2003).

The Travel Industry Association of America (TIA) is a non-profit association that represents and speaks for the common interests and concerns of the entire U.S. travel industry. In response to numerous inquiries concerning the need for the marketing campaign it tried to implement a national tourism crisis management plan including the sponsoring impressive marketing campaigns (both domestic and international). The Marketing Outlook Forum scheduled for early October (1.10.2001 to 4.10.2001) in Atlanta went ahead with significant changes to bring immediate relevance to the 9/11 events. TIA unveiled an innovative marketing partnership on October 2nd with the U.S. Postal Service centred around a new series of stamps, "Greetings from America." The stamps highlight attractions in each state. TIA launched a "See America Sweepstakes" with 50 grand prize vacations, one week for two in each state. The state tourism directors created the itineraries. The promotion took place from late March through June 2002. TV advertising campaigns took place in November to make consumers feel good about travel to and within the U.S. President George W Bush and travel industry workers such as pilots, hotel bellmen, restaurant servers and many others urged the public to travel. The campaign had more than $12.4 million in funding behind it, with a goal of $20 million. The primary target was U.S. travellers, but versions of the ad ran in Canada, the UK, Europe and Asia.

4.2.6 The media, terrorism, and 9/11

The media has the power to minimise or maximise the impact of events on the watching audience. In one sense, media campaigns can persuade potential travellers that the incident is history and business is back to normal, highlighting the good aspects of travel. On the other, they can take an event and make it global, drawing the spectacular out of the mediocre. In some circumstances there may be conflicting needs from the destination. For instance, a hurricane sweeps across a Caribbean island and creates a path of destruction. The government want to tell the world how devastating the event has been to maximise international aid, but the tourism industry may want to reassure travellers that it really is OK to come and enjoy the tourism product.

In some quarters there is the view that the media, either directly or indirectly, encourages further attacks of terrorism (Paletz and Schmid, 1992). The media's interpretation of incidents is clearly likely to influence the travel risk perceptions of potential visitors to an area that has recently gained media attention. Also the presence and reporting of the media can help achieve the terrorists' goals, extend or enhance the impact of incidents, hinder security operations and put inappropriate pressure on authorities to resolve incidents. The media can also become participants in events rather than mere observers (the current issue of the missing journalist, Alan Johnston) (Wardlaw, 1982, p.77).

In the past, media critics have documented and questioned the mass media's insatiable appetite for violence; they have explored the effects of this kind of media content on people who are gradually exposed to violence in the news and in entertainment (Gerbner and Gross 1976, Nacos 1996b; Bok 1998; Wolfsfeld 2001). One writer, Hoffman (1998), goes so far as to equate the "birth of international terrorism" with the introduction of the first TV satellite in the late 1960. The media play an important agenda-setting role. Weinmann (1982) cites studies that find

"that public rankings of the importance of various issues coincide...closely with media ranking" (p.214).

He suggests that the high attention paid to terrorism by the media

"determines a consequent priority in the public's perception of priority of issues."

The importance of news coverage in modern democracies is discussed by Norris et al. (2003) who argue that citizens tend to be dependent on the media for information about events and the actions of governments. Even if most citizens learn about current affairs through conversations with others, mass mediated news is often the originating source.

Nacos (2002) argues that the media play a central role and can magnify or minimize acts of violence and their perpetrators. Typically, the media focuses on major and even minor incidents and has the capacity to elevate them to the level of spectacular reality shows. This will clearly influence the travel risk perceptions of would-be

travellers, perhaps correctly, but sometimes incorrectly. A classic example of media coverage is that relating to the attack on the World Trade Center Towers where the image of the two planes crashing into the towers was put on a loop behind the news broadcasters for hour after hour, as they updated the audience on events. This must surely have been an image that was etched on most air travellers' eyes and altered their perceptions, at least in the short term, of the risks of flying.

While violence-as-crime and violence-as-terrorism tend to be grossly over-reported, the coverage of terrorist incidents that provide dramatic visuals is probably out in a league of its own in terms of media attention. Ordinary criminals tend not to commit their acts of crime in search of media attention but, for terrorists, publicity can often be seen as their lifeblood. The news media and coverage can be "considered modern tools of terrorist" (Picard 1993 in Norris et al. (2003) and they enjoy a symbiotic relationship (Wardlaw 1982; Wilkinson 1987). Given the violent nature of terrorist actions, "deviance" has often been used as the term to describe the confluence of impact, conflict, sensationalism and novelty that makes them newsworthy Shoemarker et al.(1987). The finding by Norris et al. (2003) suggests that television (in particular) shapes the psychological reactions to terrorist events. The media can also be a tool used to prolong the impact of terrorist acts, exemplified by bin Laden's ability to transmit his message via al Jazeera in the months following 9/11.

Counter to this argument about the role of media expanding the image of acts of terrorism, some argue that for all the excesses in reporting, especially through electronic media, the news did not reflect the full horror of the 9-11 terrorism and the press tends to sanitize reality (Nacos,2002).

4.3 Tourism in Spain

Spain is one of the largest countries in Europe, occupying four-fifths of the Iberian Peninsula shared with Portugal. Spain is located in Southwestern Europe, bordering the Bay of Biscay, Mediterranean Sea, North Atlantic Ocean, and Pyrenees Mountains, Southwest of France (see map 4-3). There are 19 autonomous communities including the Balearic Islands and Canary Islands, and three small Spanish possessions off the coast of Morocco - Islas Chafarinas, Penon de

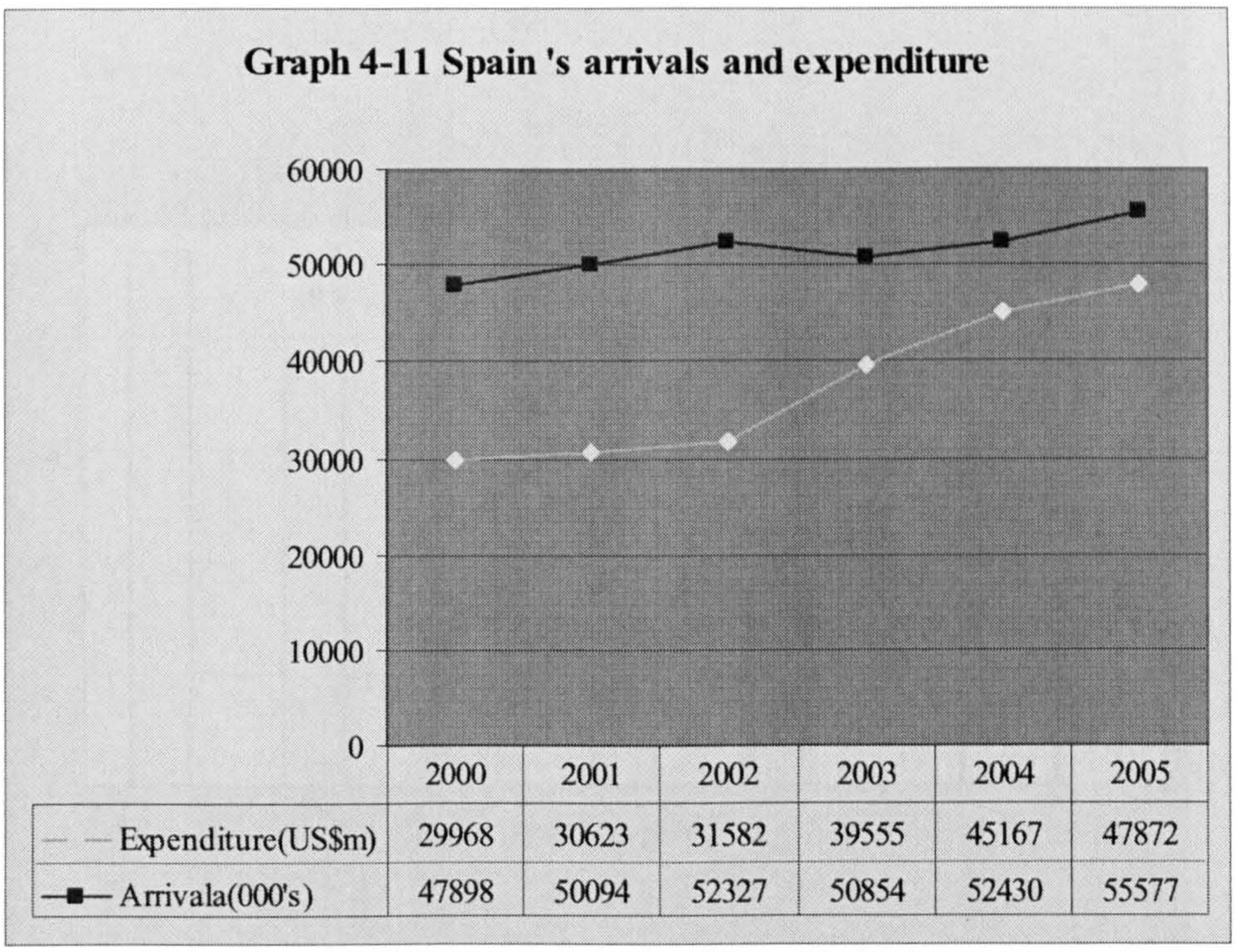
Alhucemas, and Penon de Velez de la Gomera (CIA, 2005). Spain is a major tourism venue because of its good climate, coasts, historic site and natural features and its geographic location that is easily accessible by Europeans.
http://www.iexplore.com/dmap/Spain/Where+to+Go

Map 4-3 Spain

Source: from lonely planet

According to Frangialli (2004) the UNWTO general secretary, 'Spanish tourism has changed dramatically in the last decade: it became much more diversified and is no longer only a 'sea, sun, sand' destination, but a player in the international market, with a developed meetings industry, culture, gastronomy, famous pilgrimages'.

Spain remains the second largest tourist destination in the world just behind France with an estimated 55 millions tourists in 2005 and ranks second, globally, in terms of revenue after the USA.

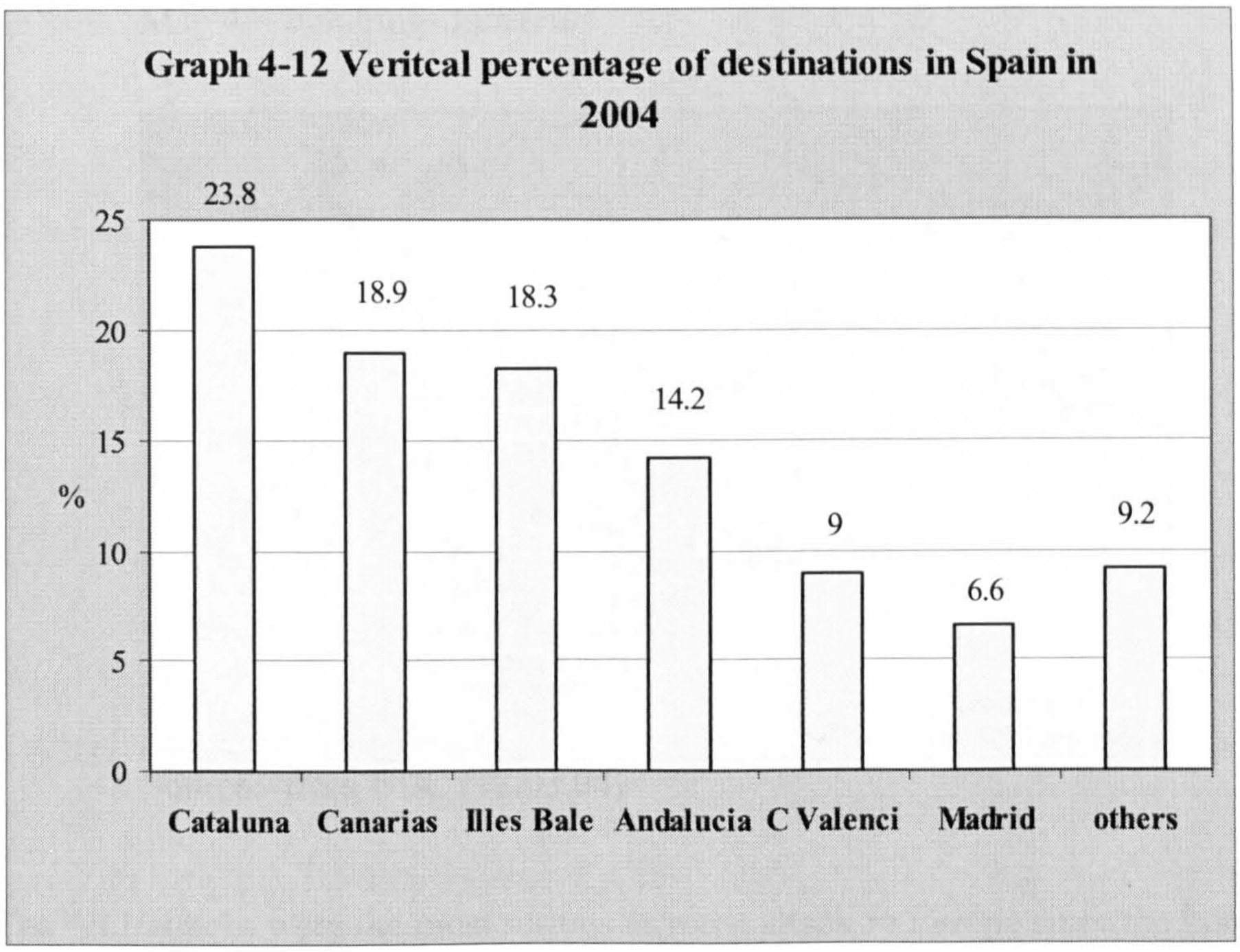


Source: adapted from Frontur (2006) UNWTO (2006)

The significance of tourism to Spain's economy is substantial (see Graph 4-11). Tourism accounts for 12% of GDP, supporting around half million jobs, which is 12.2% of the active population and 20% of the service sector (Tourism Satellite Accounts 2004, Exceltur 2004, and BBC 02.05.04, UNWTO2005). The 55.6 million overseas visitors who came to Spain in 2005 spent 47, 872 US$ million, an increase of 5% compared to year 2004.

4.3.1 Madrid

Madrid, the capital of Spain, is the largest city and home to the United Nations World Tourism Organization. Madrid has many attractions to offer visitors, it is probably as a consequence of centuries of centralism and because the city has been the official residence of the heads of the state; it has today a rich architectural, cultural and historical legacy. Madrid attracted 3.2 million foreign visitors in 2004, that is about 6.6% of total visitor numbers to Spain, and supports 10% of total employment in the capital (Tourism Satellite Account, 2005). Madrid is the sixth main market for Spain after Cataluna, Canarias, Illes Belears, Andalucia and Valencia (see graph 4-12).



Source: adapted from Frontur (2005)

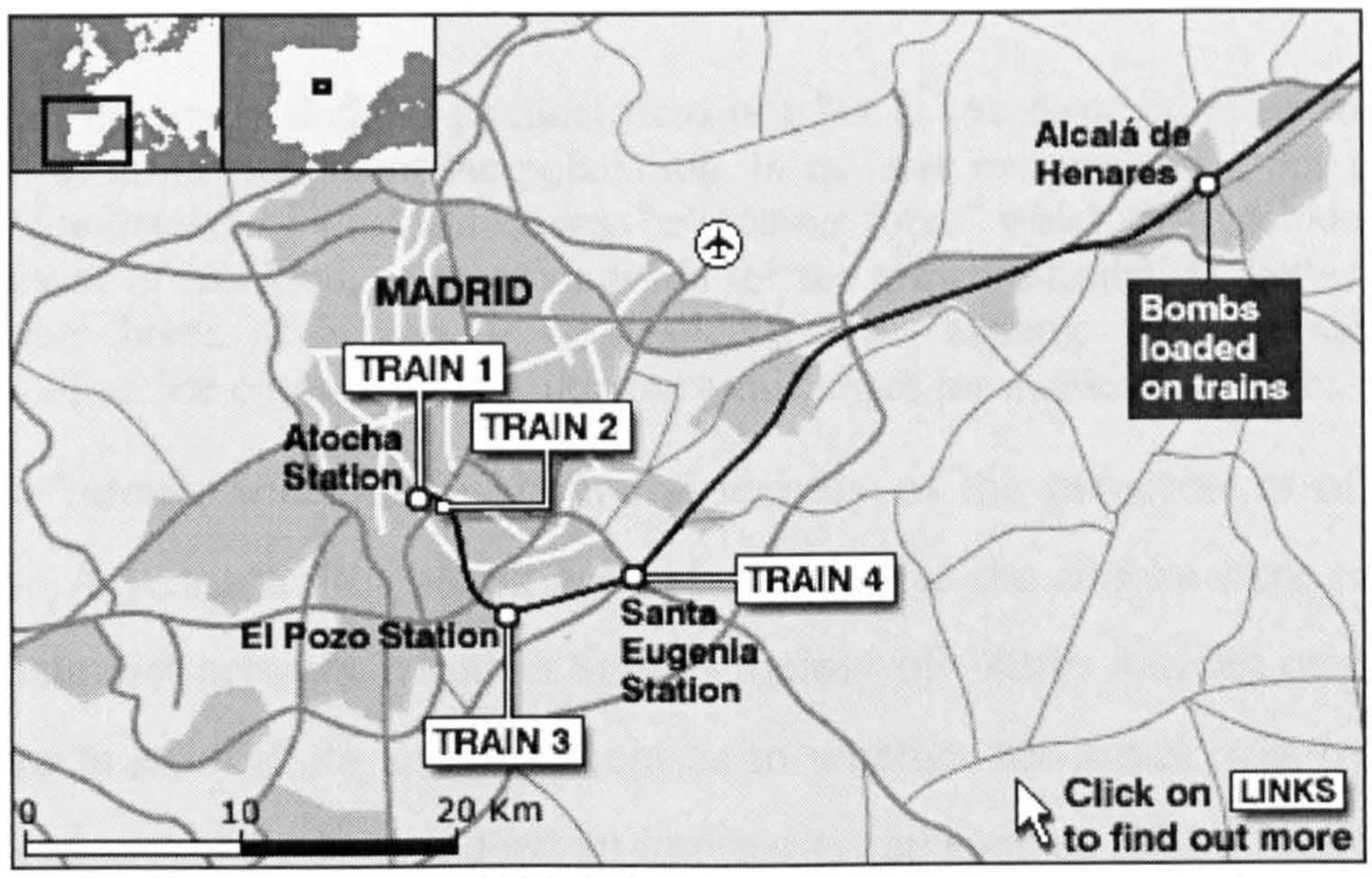
However, in spite of its many attractions and offerings, as can be seen from Graph 412, the city is not a major receiving destination for Spain.

http://proquest.umi.com/pqdweb?index=7&did=665846791&SrchMode=1&sid=9&Fmt=10&VInst=PROD&VType=PQD&RQT=309&VName=PQD&TS=1130754887&clientId=15517

4. 3.2 Madrid bombings

The Madrid bombings took place on the 14th March 2004 just before the general election was to take place. Like the attacks in the USA and London, the Madrid bombings used the transport network as a means to bring death and destruction to the capital. The attacks came in the form of synchronised bombings on the Madrid commuter train system, resulting in the death of 191 people and wounding a further 1,460 (BBC, 02.05.2004). There were 10 bombs detonated on four trains in three stations during the busy morning rush hour (see map 4-3).

Map 4-4 bombings locations



Source: from BBC (12.03.04)

The 4/11 attacks were the most serious terrorist attack in Europe since the bombing of the Pan-Am plane over Lockerbie in 1988 and the worst terrorist assault in modern Spanish history. The number of victims in this attack far surpassed Spain's previous worst bombing incident at a Hipercor chain supermarket in Barcelona in 1987, which killed 21 and wounded 40; on that occasion, responsibility was claimed by the Basque armed terrorist group ETA. Following the bombings, there was widespread belief, aired through the media that ETA was also responsible for this attack, in spite of anomalies in terms of the way in which the attacks took place. There were also suggestions that the Islamist organization al-Qaeda was responsible. ETA has a history of mounting bomb attacks in Madrid, planting delayed-action bombs to kill rescue workers and using booby traps (such as explosives in wallets), as well as having attempted to attack trains. However, the 11th March attacks were on a scale far exceeding anything previously attempted by a European terrorist organization. ETA customarily issue warnings before its bomb attacks and there was no warning for this attack. This had led some to point out that the tactics used were more typical of Islamic militant extremist groups.

According to Enders and Sandler (2000) the growth of religious terrorism worldwide appears to account for increased severity of terrorist attacks since 1991. For zealots, violence was established as the only means to overthrow a reviled secular government

and attain religious redemption (Hofmann, 1998) and Laqueur (1999 in Griset and Mahan 2003) argues that the new terrorism is different from the old,

"Aiming not at clearly defined political demands but at the destruction of society and the elimination of large sections of the population. In its most extreme from, this new terrorism intends to liquidate all of what it deems to be" satanic force" which may include the majority of a country or of mankind, as a precondition for the growth of another, better , and in any case different breed of human. In its maddest, most extreme from it may aim at the destruction of all life on earth, as the ultimate punishment for mankind's crimes. (p.81)

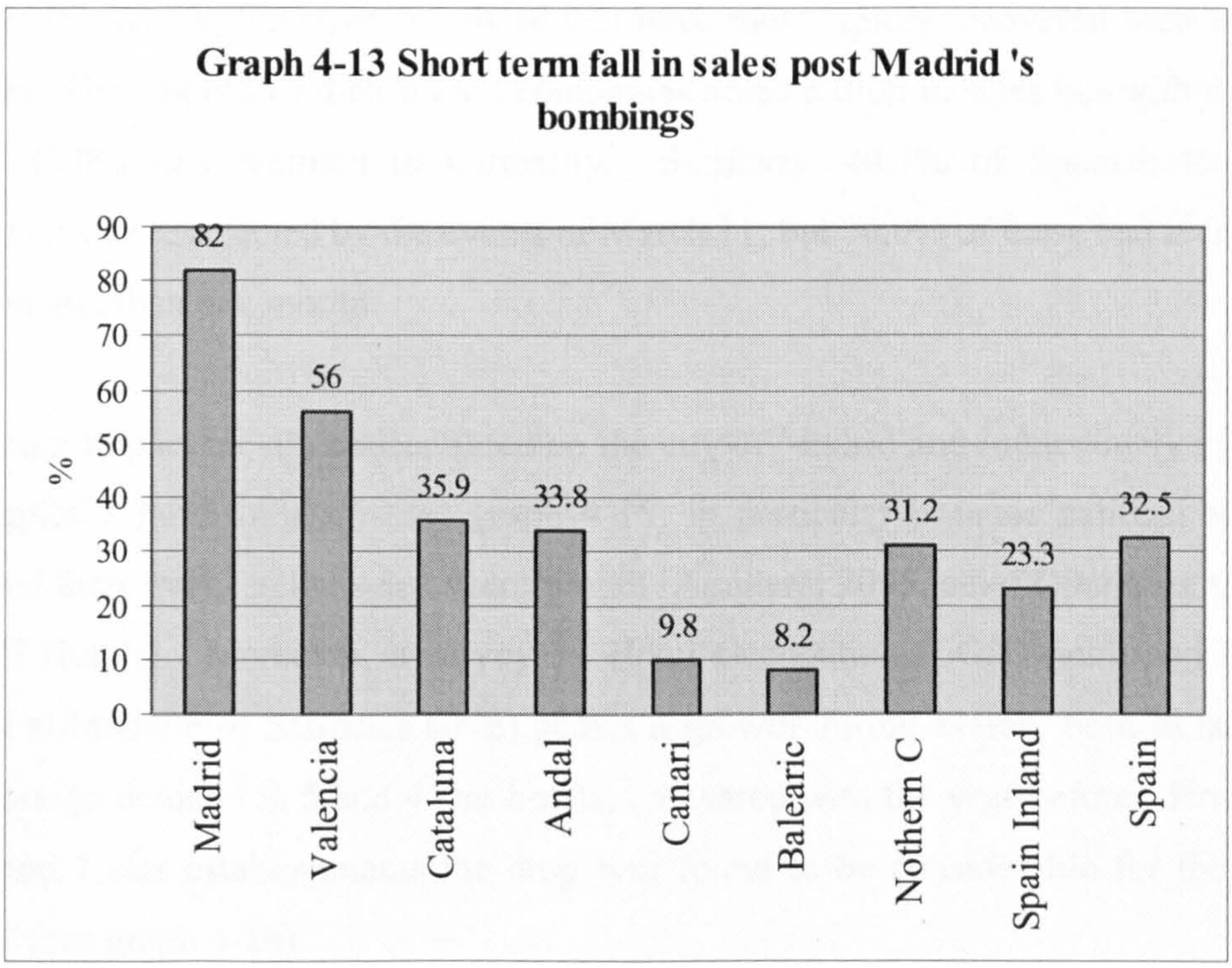
There was intense speculation about the identity of the perpetrators of the Madrid bombings. A year after the attack it was believed that the attacks were carried out by a radical Islamist network based in Spain - mainly of North African origin. But even today there is still debate and argument as to whether the attack was by an Islamist group linked to Al-Qaeda or indeed an internal group such as ETA. From a travel risk perception there is an important distinction between the two groups. If it is the latter group then travellers in general may not have enhanced levels of risk providing they are not travelling to Spain. If, on the other hand, it was Al-Qaeda then there is the likelihood that this attack will provide cumulative effects on travellers risk perceptions wherever they are travelling.

4.3.3 The impacts of the Madrid bombings on the tourism industry

In spite of the severity of the Madrid bombings, the impact of the attacks on the arrivals and spending of visitors to Spain in general was not as significant as one might have expected.

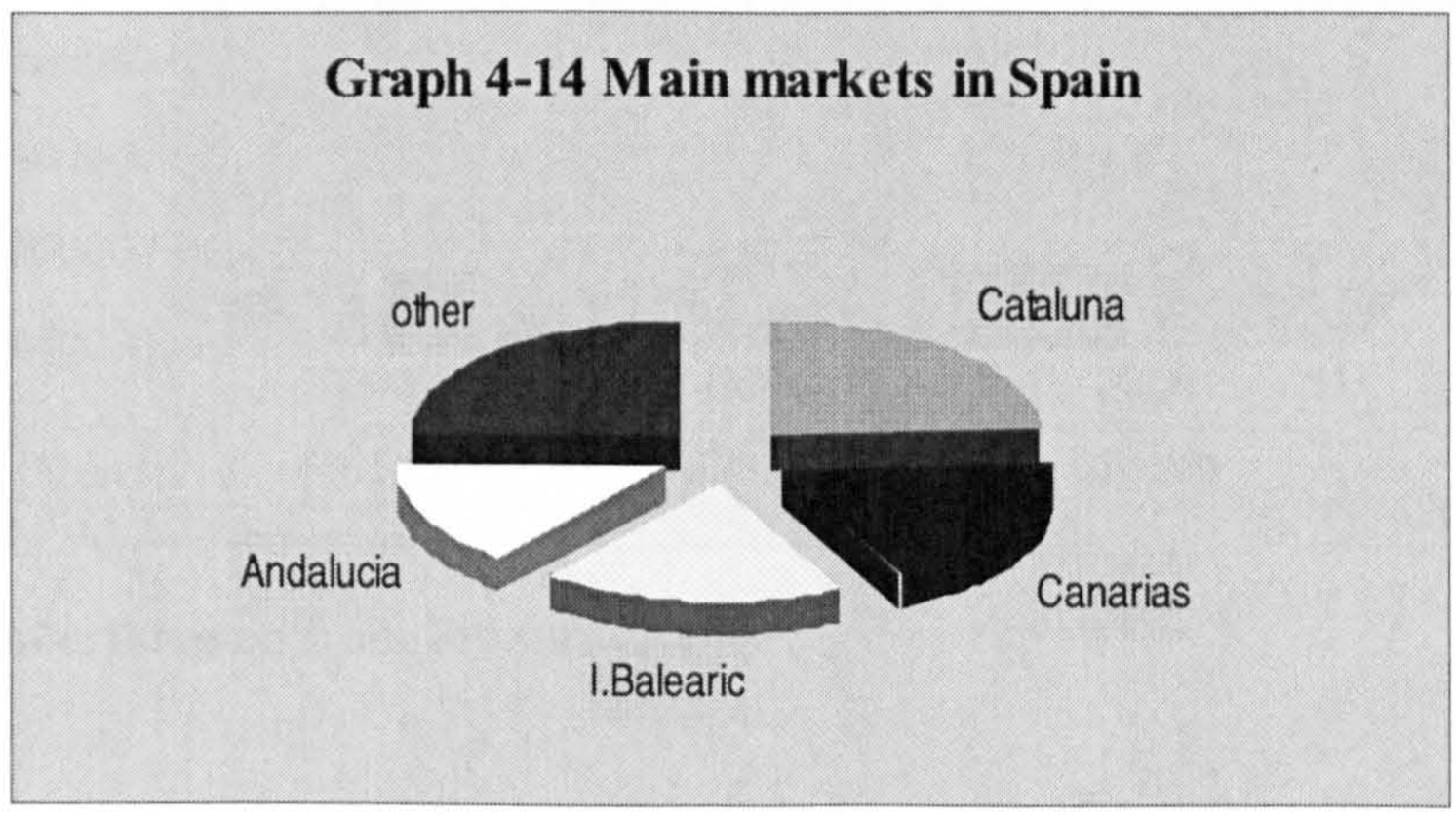
Exceltur (2004) carried out a survey of 1200 tourist businesses during the period between March and April 2004 and only 34.4% noted an effect on their sales during the days following the attack, while the remaining 65.6% did not notice any effects at all and carried on their activities as normal. Of the 34.4% who noticed a slight dip in activity, half of them said sales were down less than 5% while scarcely a quarter of them suffered losses of sales of more than 10%. From 34.4% of companies surveyed throughout Spain which indicated that they had been affected, 48.5% of these note that up until 08 April 04 their sales have recovered which shows only 17.7% of the total number of Spanish tourists operator surveyed were still affected after the first month. Furthermore, the result showed that the effects concentrated exclusively on the

city of Madrid (see Graph 4-13) and were only notional in destinations with a greater presence of long distance tourists, which were gradually restored in about 3 weeks.



Source: adapted from WTTC (2004)

Therefore, while in Madrid in the short term 82% of tourist operators suffered a fall in sales and in 30.1% of cases this was greater than 30%, in the two destinations which annually combine to capture about 40% (see graph4-12 ;4-13and 4-14)of the total international tourist market in Spain, namely the Balearic and Canaries, the short–term impact of March 11 on the tourist companies surveyed affected by 8.2% and 9.8% their respective sales in the initial days following the attack.

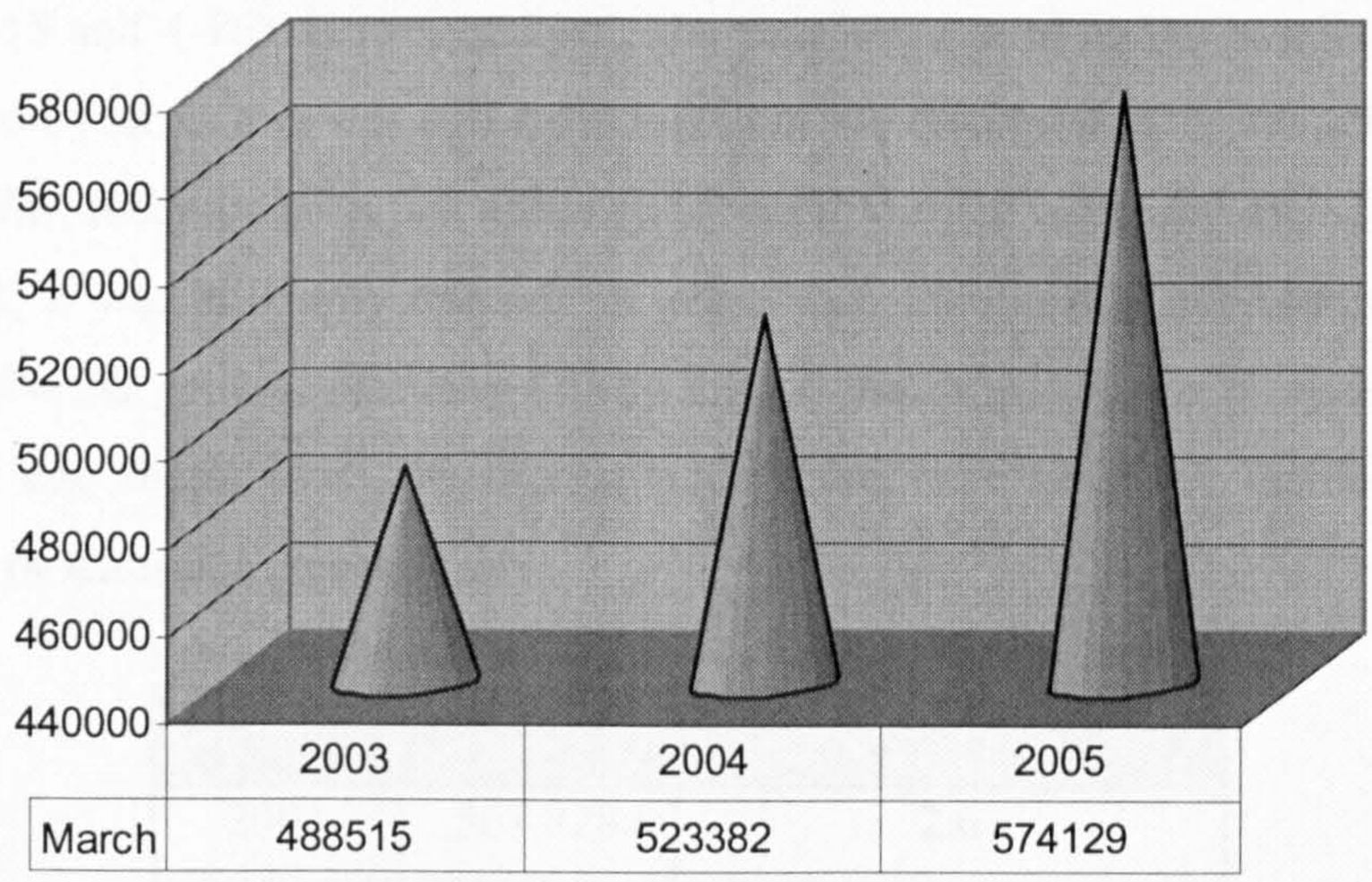


Source adapted from: Frontur (2005)

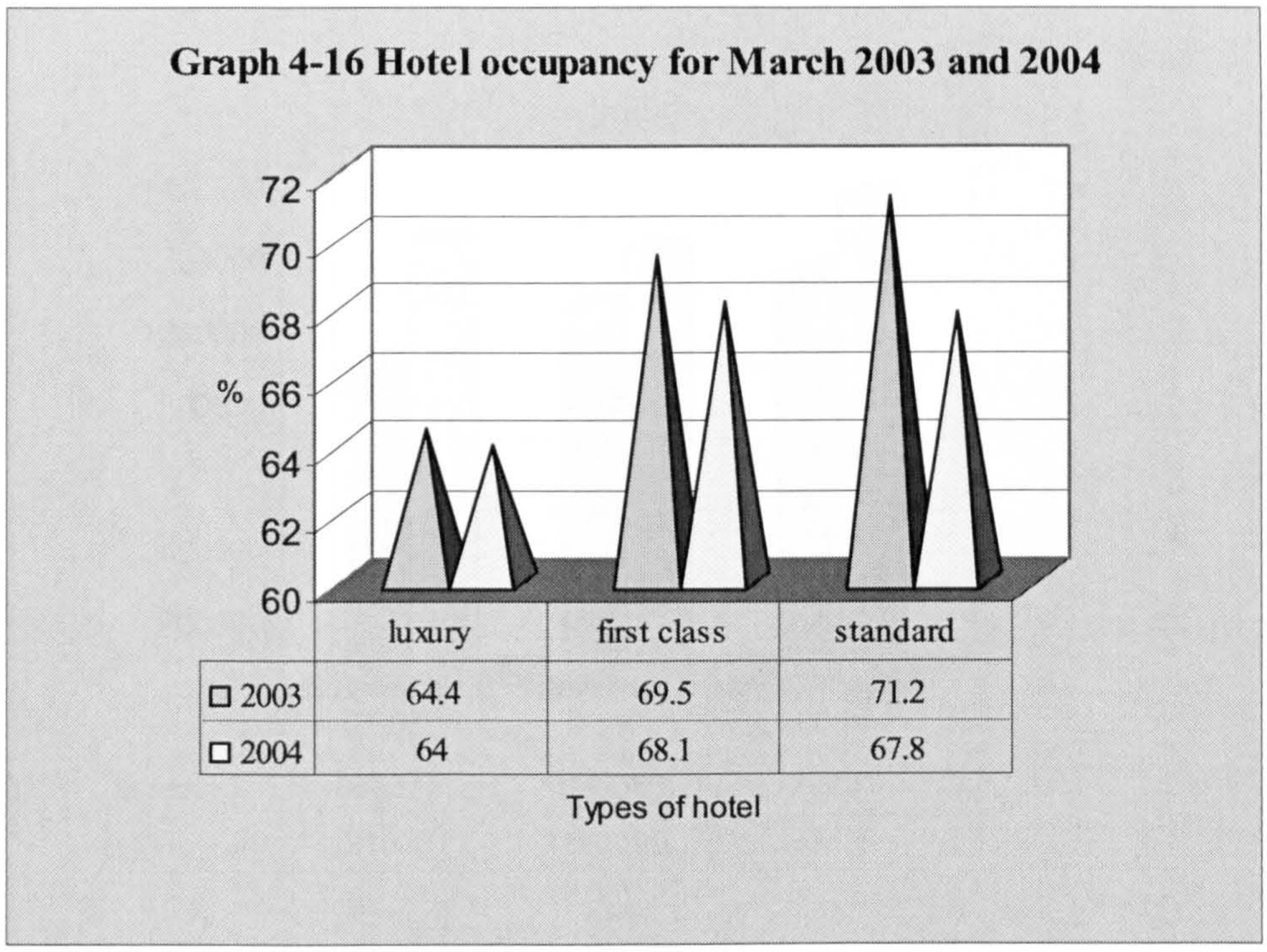
Furthermore, according to the same survey by Exceltur in 2004, an analysis by sub sector showed a greater initial impact on Spanish travel agencies and transport companies, which, however, are those that have most rapidly recovered their normal activity. Thus 54.6% of distribution companies noted a drop in sales but within a few days, 80.0% had returned to normality. Similarly, 40.7% of Spanish transport companies were affected by the events of March 11, but 70.0% of these had recovered fully in less than one month.

The main impact mostly concentrated on the city of Madrid and immediately affected the capital's hotel industry (see graph 4-15) in particular because national visitors reduced their travel in the subsequent month (Aguilera, 2005, chief Operating Officer of NH Hotels). Moreover, a survey by Hotel Occupation (EOH) published by the National Institute of Statistics (INE) shows a growth during March, both in national and foreign demand in 5 and 4 star hotels, compared with the year before. However, in 2 and 1 star establishments the drop was found to be considerable for the same period (see graph 4-16).

Graph 4-15 The number of tourists staying in Madrid hotels March 2003-2005



Source: adapted from Frontur (2005)



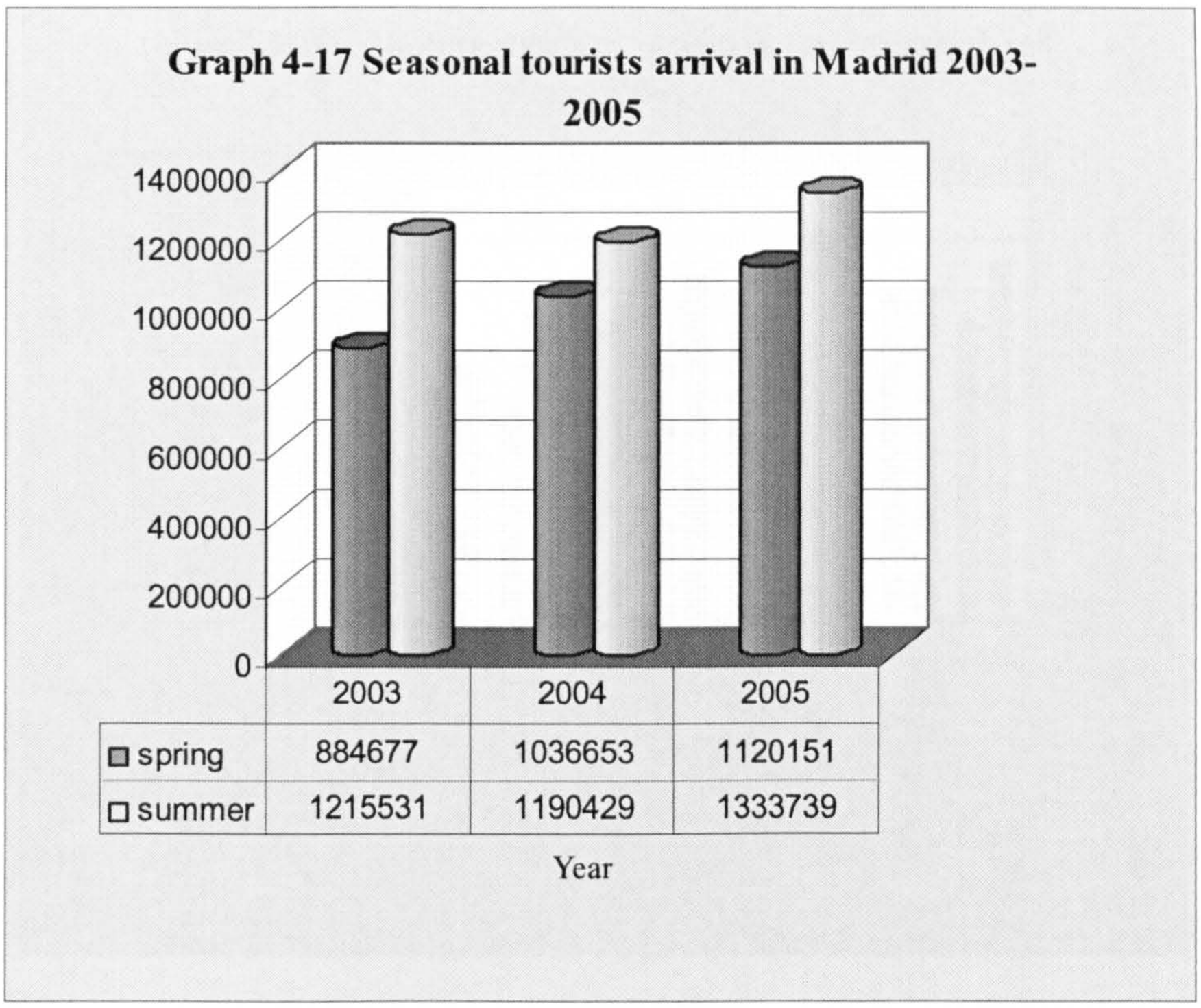
Source: adapted from Exceltur (2005)

According to Exceltur in WTTC(2005) the official information in respect of the volume of foreign tourists arriving in Madrid, and the amount of travellers and overnight stays in Madrid hotels during the month of March 2004 shows some growth (Graph 4-15 and 4-16). However, 2002, the year being used as the baseline, was not itself a good year as this was still suffering from the effects of 9/11 and subsequently the Iraq War. It can be seen that although inbound tourism increased by 7.1% in 2004 over 2003, it was still only around 3% more than the arrivals in Madrid hotels in 2001. UNWTO general secretary (2005) argued that it is difficult to distinguish the effects of one factor from the others, since there were so many incidents, either manmade or natural, in recent years.

Table 4-5 Hotel occupancy in Madrid hotels 2001-2005

Year	Number	Year to year variation
2001	507,428	2.6
2002	461,597	-9.0
2003	488,515	5.8
2004	523,382	7.1
2005	574,129	9.7

Source: adapted from Frontur (2005)

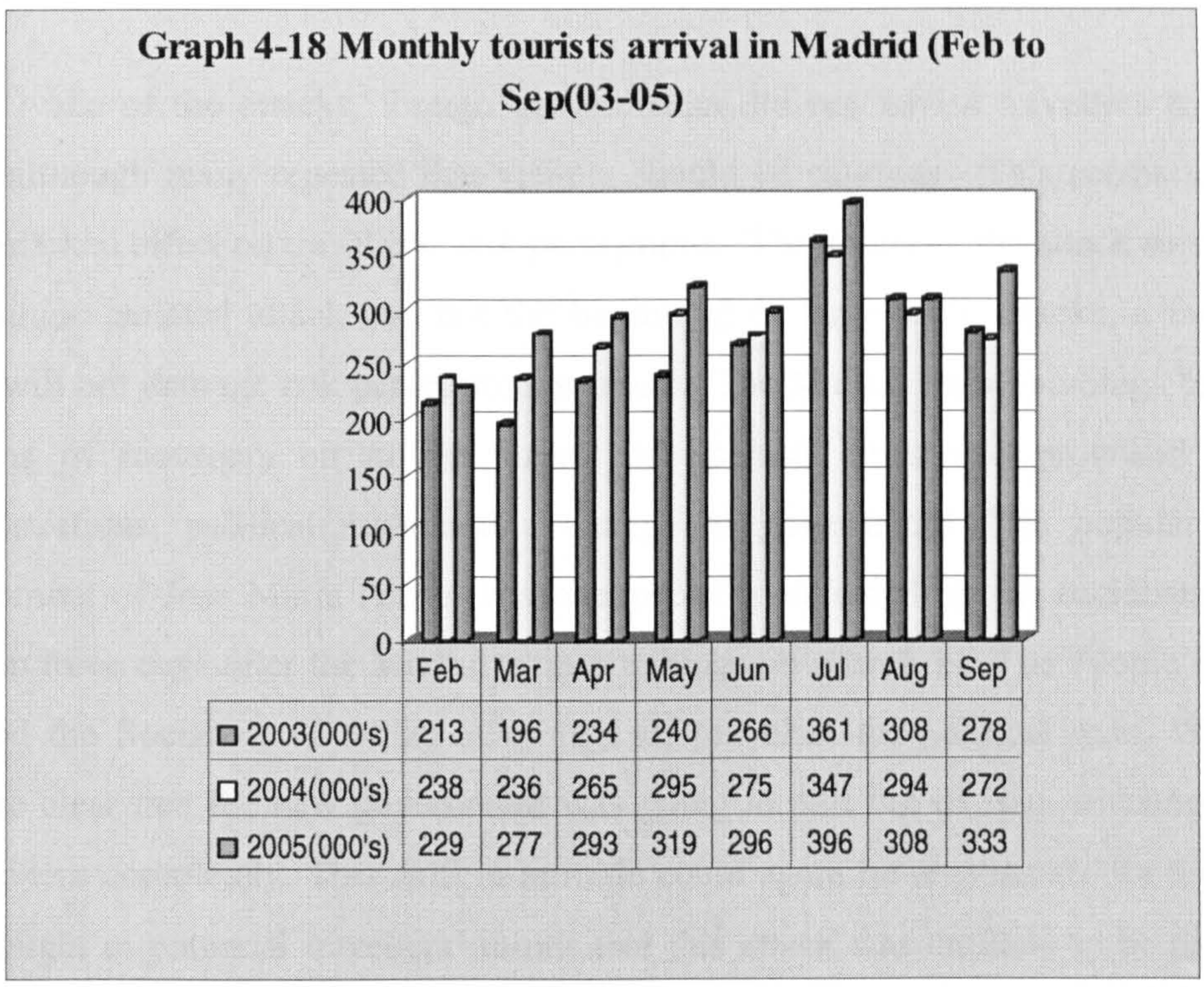


Source: adapted from Frontur (2005)

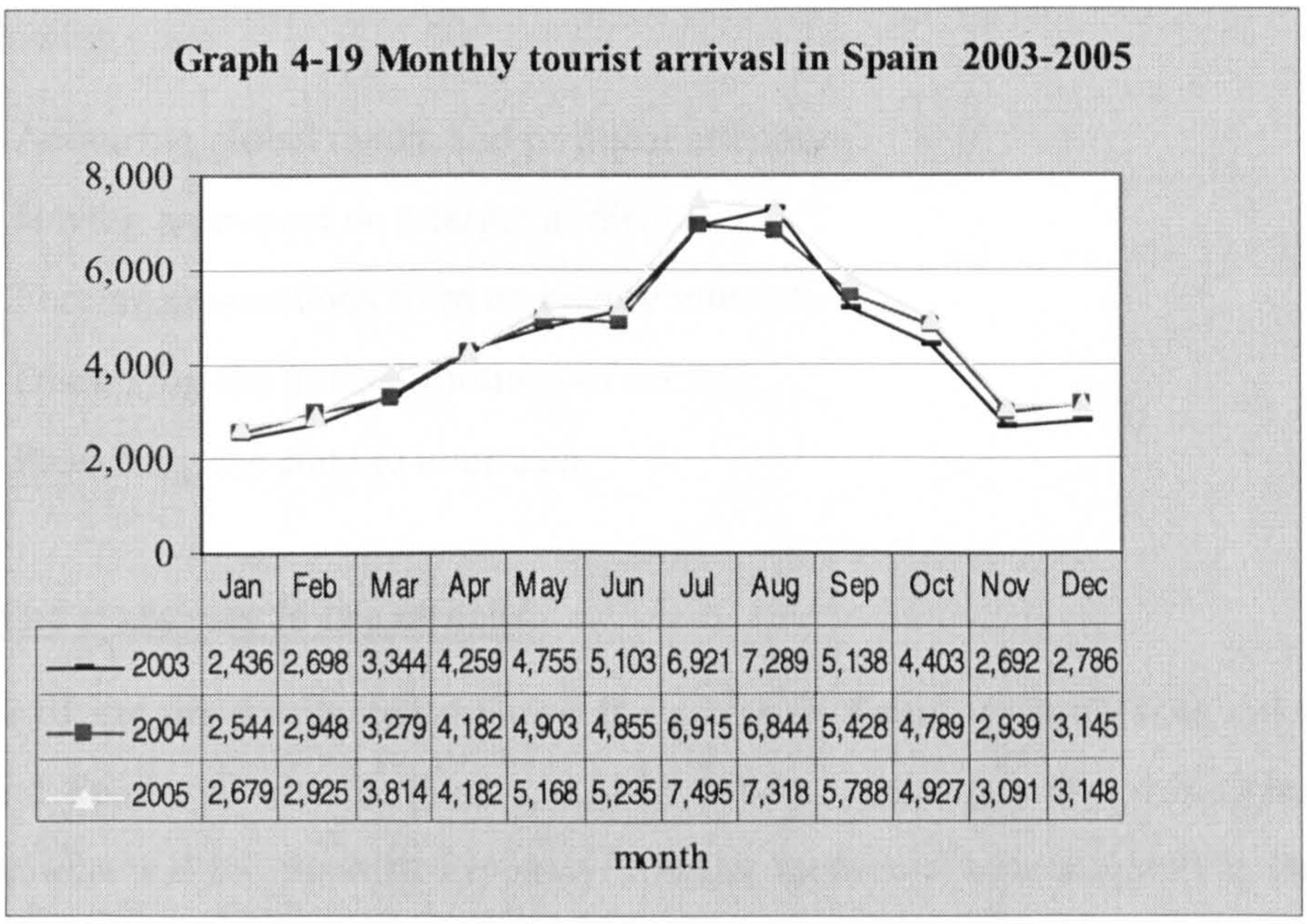
Table 4-6 Tourism arrivals to Madrid 2001-2005

Year	Number	Year to year variation
2001	264,224	1.8
2002	254,151	-3.8
2003	196,892	-22.5
2004	236,728	20.2
2005	277,106	17.1

Source: adapted from Frontur (2005)



Source: adapted from Frontur (2005)



Source: adapted from Frontur (2005)

Monthly arrivals show how marginal and short-lived the impact of the train bombings was on the number of arrivals to Spain. In 2005 tourism in Spain showed a stronger growth both in terms of arrivals and in terms of expenditure (see graph 4-11 and 4-19)

In the wake of the attacks, foreign governments did not advise travellers to avoid Spain although many repeated that visitors should be cautious. This seems to have had a marked effect on travellers' risk perceptions. The nature of the attack seemed to be a single isolated attack and not the beginning of large-scale attacks, a fact that again will not damage risk perceptions so much. The Madrid train bombings brought millions of mourners on to the streets of Spanish cities and provoked angry demonstrations, political rows and a change of government. The popular Party government of Jose Maria Anzar was unexpectedly defeated by the socialists in an election three days after the Madrid train bombings on March 11. The People's Party accused the Socialists of taking advantage of the blast for political gain. When it became clear that the new government was going to pull out of Iraq, it changed the atmosphere completely. This shift in attitude could again be responsible for securing the thought in potential travellers' minds that this attack was unlikely to be repeated and hence recovery was rapid. Some could argue that the terrorist attacks in Madrid were effective in several ways, as terrorists have been known to declare victory using the following area:

- Acquiring global media and political attention;
- Having an impact on a target audience;
- Forcing concessions from an enemy interest;
- Disrupting the normal routines of society;
- Provoking the state to overreact.

4.3.4 The responses to the attacks

In view of the unprecedented scale of the attack in Spain, security rose not only in mainland Spain but also in France, and in Athens where security was tightened at train stations and the Spanish Embassy. Similar measures were adopted in Italy. All railway traffic to and from Madrid was stopped, including commuter, regional, and intercity trains as well as the high-speed AVE service to Seville. International rail traffic to and from Madrid was also interrupted due to security concerns.

Most TV stations reported the attack during their regular morning news programmes, starting around 08:00 and the public regional and national broadcasting companies

took commercial breaks off air. All TV stations replaced their logos with black ribbons overlaid on the Spanish flag at 18:00, visible in the lower-right corner of the television screen. People across Spain flocked to hospitals and mobile blood donation units in such numbers that the need for blood for transfusions was more than satisfied as early as 10:30, although continued donations were requested for the coming days.

Soon after the bombings, the government issued a decree declaring three days of official mourning, and demonstrations were called for the evening after the bombing with the rallying cry "With the victims, with the constitution and for the defeat of terrorism".

Sympathy poured in from governments worldwide immediately following the bombings, led by Spain's partners in the European Union. European Commission President Romano Prodi called the attack 'ferocious and senseless'. UNWTO Secretary-General Francesco Frangialli (2004) said 'It was an attack against Spanish democracy and the people living in Madrid, not against the Spanish tourism industry or foreign tourists'.

In an attempt to prevent such atrocities happening again and to reassure the travelling public, the March 2004 bombings can be seen as a catalyst in the enhancement of European counter terrorism preparedness. The attack demonstrated just how vulnerable the European Union is, and seemed to mobilize European security forces and politicians into adopting a more co-ordinated and defined approach to security issues. According to a European Commission action paper (18.03.04) in response to the terrorist attack on Madrid, the terrorists responsible for the attack in Madrid have struck against the fundamental principles of all European states and on which the Union is built: 'Respect for human dignity, liberty, democracy, equality, the rule of law and respect for human rights'.

4.3.5 Security response

Following 9/11, Spain has arrested more than 200-suspected terrorists, more than any other country in Europe. Spain has been fighting the Basque Fatherland and Liberty group (ETA), which seeks an in independent homeland in northern Spain and southern France, for four decades but according to Mannuel Navarete (2005), head of the counter terrorism for Spain civil guards, Spain was unprepared for the tactics of al-Qaeda. He furthermore stated in USATODAY.com(3.09.2005):

"Unlike the Islamic cells, ETA has paramilitary structure, its members follow orders. They plan and they want to escape. In contrast, the Islamist terrorists who planned the bombs that took out four Madrid bound commuter trains made their move quickly and their plan was simple and cheap. They bought the explosive less than two weeks before the attack and spent about $7500 on the operation. There is no way to stop them in 10 days; we have no time to react".

Navarete added that the fact that attackers are willing to die makes it more difficult to stop provide effective systems to stop the acts. Given the high proportion of Muslims resident in Spain and the country's proximity to Morocco, it is clearly a country that is open to infiltration by terrorist groups.

After the 3/11 attacks, Spain tried to develop more specialized teams to fight against Islamic terrorism and deal with immigration, serious crime and illegal activities, mainly using the following options (usatoday.com 03.09.05):

- The 46–member Civil Guard counter-terrorism unit was more than doubled by the end of the 2005
- There was a 300% increase in the number of agents that the police hired to focus on Islamic terrorism
- 22 suspects were brought into jail
- A Madrid–based terrorism-coordinating centre for the police, military and secret service opened in 2004 and security liaisons were dispatched to countries including Morocco, Saudi Arabia and Libya (all countries that were thought to be key links for the European network of al-Qaeda).

The Madrid attack prompted a special meeting of the European Council on 25 of the March 2004, which issued a Declaration on the combating of terrorism and identified that further work was required to be done. The fact that the London 7/7 attacks occurred only proved that these steps were uncoordinated and inadequate. See for example: http://www.publications.parliament.uk/pa/ld200405/ldselect/ldeucom/53/5305.htm

4.3.6 Marketing Response

The Comprehensive Plan for Quality in Spanish Tourism (PICTE 2000) is the result of the many efforts to redirect Spanish Tourism made by both private and public sectors. The aim is to ensure that the concept of the "quality holiday" is a factor that makes Spain stand out from other destinations on the international markets.

In the wake of the Madrid attacks, Antonio Nieto, General Director for Tourism for the region of Madrid in 2004 said:

" the Terrorists' attack had a slight impact on the tourism industry and Madrid rebounded after only a few weeks and the number of international tourists visited Madrid in the month of March 2004, grew more than 7,4%. The information clearly demonstrated that, Madrid, as a tourists destination did not collapse and sends an optimistic message that the impact has been much lower than expected in the first few days-although we need to be cautious about next months"

The Head of Finance, Economy and Tourism Development, Miguel Angel Villanueva, described Madrid after the attack as "an open-minded city, receptive to the outside world but which brings with it its own rich historical and cultural heritage - but with a mind to the future(WTTC,2004). This new Madrid requires a new type of quality tourism, which can go hand in hand with culture, social activities or business if so required".

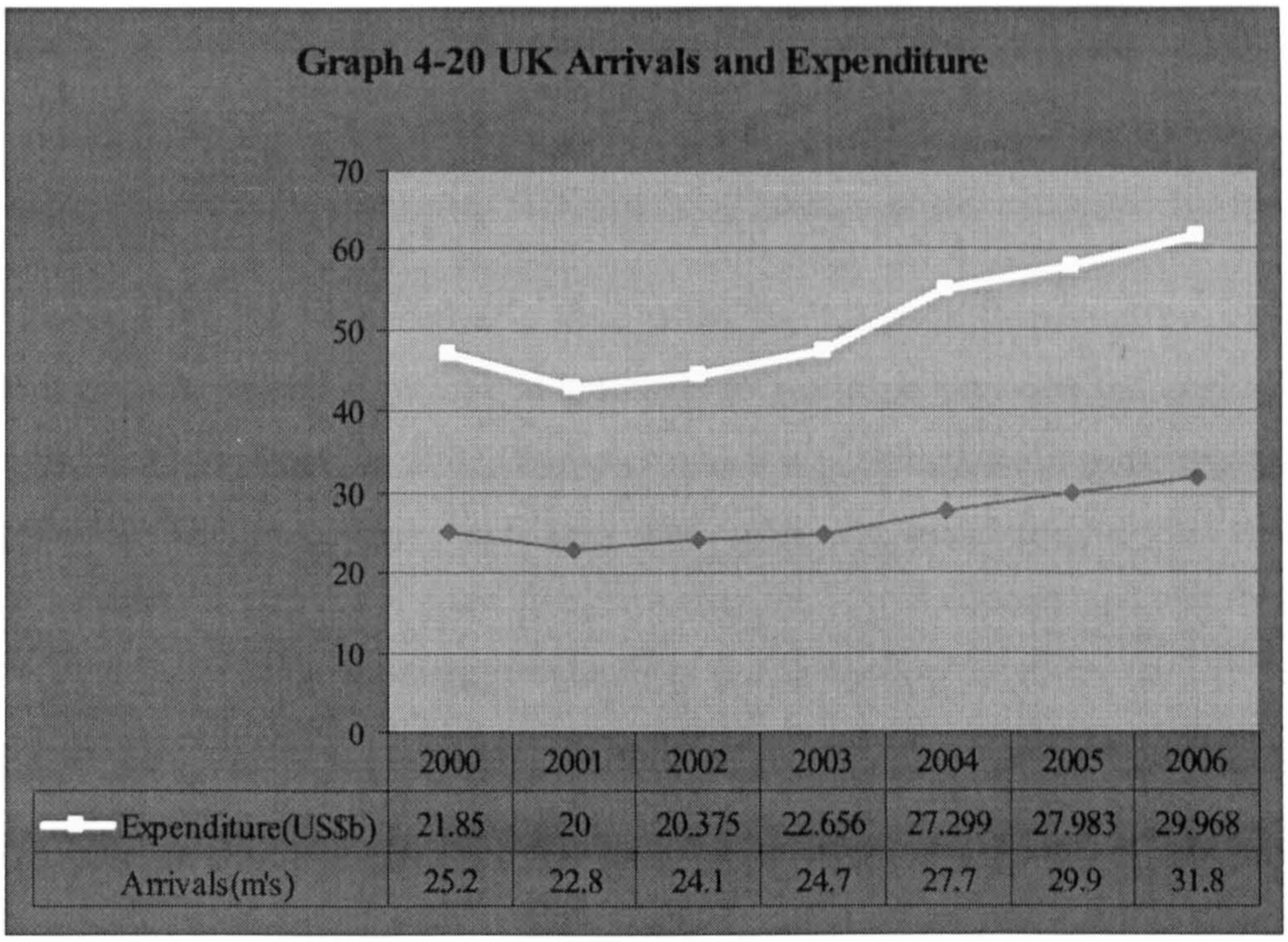
Spain launched a marketing campaign, as a response to the bombings, in May 2004, allowing a brief period of mourning after the attacks. Europe accounts for 90% of international arrivals to Spain, with the UK, Germany and France generating more than 60% of all inbound visitors and this is where the marketing campaign was primarily focused. To give added strength to the message that Madrid was back to normal, on 22nd May 2004 the city hosted the Royal Wedding of H.R.H. Prince Felipe. This was an historic occasion and a similar event had not taken place in the city for 98 years. The 1500 VIP guests gathered for the wedding, which included members of Royal Households and Heads of State and Government from across the

globe. Madrid tried to show its capacity as an international stage, its pleasant nature and welcoming spirit that demonstrated in a very short time that it had managed to get back to complete normality (Villanueva, 2004). Madrid Mayor Alberto Ruiz Gallardon said the wedding was 'just what Madrid needs following the worst suffering Madrid has experienced in decades' (BBC, 22.05.04).

4.4 Tourism in the United Kingdom

Tourism is one of the largest industries in the UK, ranked sixth in the international tourism (see graph 4-20) earnings league (2004) behind the USA, Spain, France, Italy and Germany. It accounts for 1.2% of the UK economy. According to Visit Britain (2007), over 2 million jobs are sustained by tourism activity in the UK, either directly or indirectly, although this figure is probably a gross under-estimate. London is the principal gateway to the United Kingdom and most international visitors arrive there.

Source: factmonster.com



Source: adapted from UNWTO (2006) and international passenger survey in Visit London (2007) and http://www.tourismtrade.org.uk/Images/twv_tcm12-12321.pdf and http://www.tourismtrade.org.uk/Images/tws_tcm12-12320.pdf

4.4.1 Tourism in London

London is one of the world's most popular destinations, Europe's richest city and a key financial centre (Visit London, 2006). The tourism industry is critical to the economy of London in terms of its ability to generate income and job opportunities. A successful tourism industry builds a successful London (London Development Agency, 2005). London plays an important role in welcoming overseas visitors and creating a first impression and in providing opportunities to influence visitors. The number of passengers arriving at and departing from London's airports was over 120 million in 2004. Heathrow handled 67m passengers, making the airport the busiest and best connected in the world (*CAA*, BAA in Visit London, 2005). Half of all overseas visitors spend time in London, with 3 out of 4 overseas visitors passing through London. Tourism underpins many aspects of life in London, and has the potential to continue growing; the Olympics in 2012 could speed up the growth. According to Visit London (2005) total spending in London amounts to around £15 billion during the year and accounted for about 6-7% of London GVA (c10%of GDP).

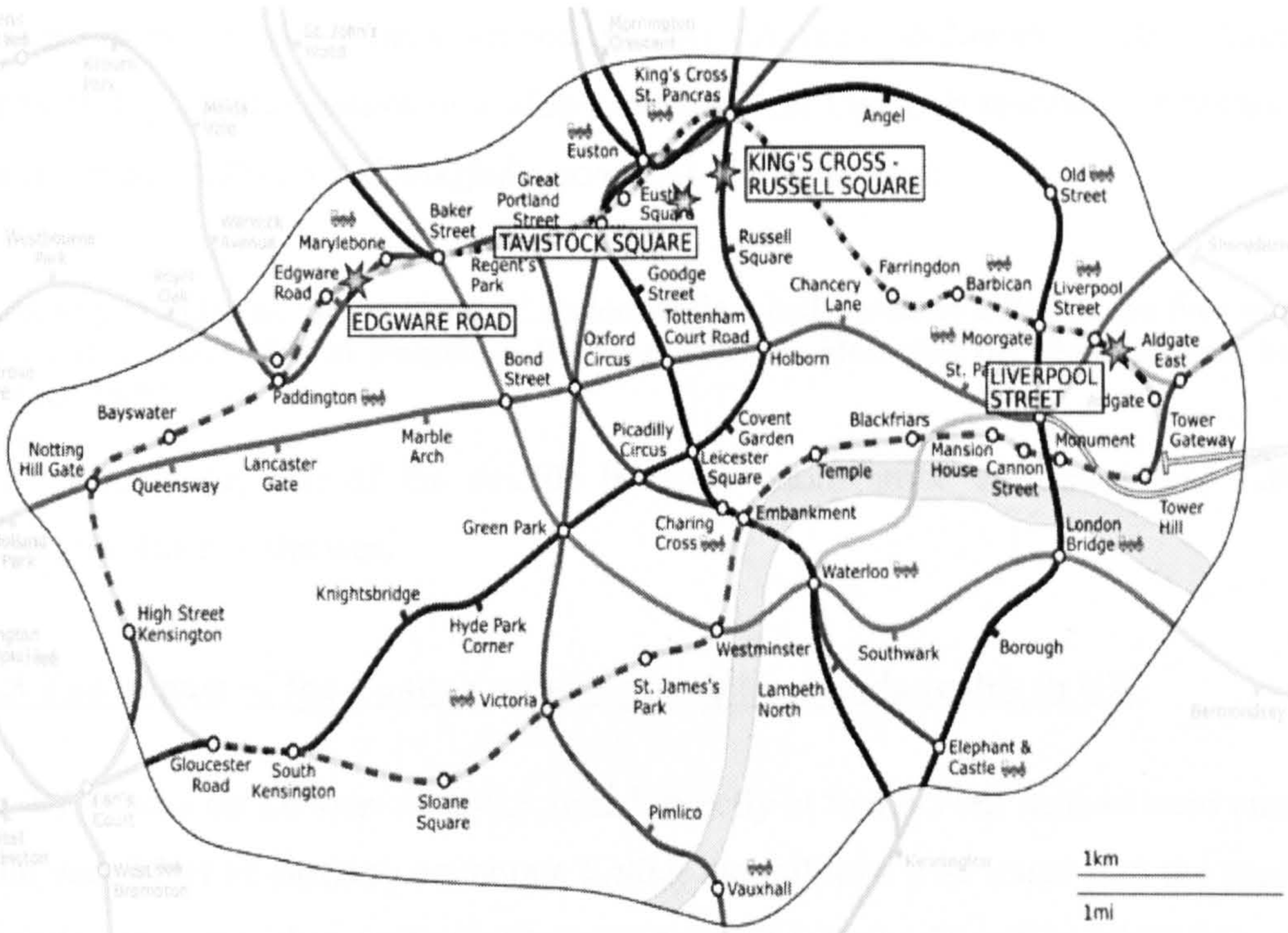
A 1% sustained increase in overseas visits to London corresponds to a 12.8% increase in London jobs. For domestic visits the equivalent figure is 0.34%.

4. 4.2 London attacks

The London attacks happened at a time when the UK was distracted by a global summit meeting intended to look at solutions to world poverty and the euphoria of winning the bid to hold the 2012 Olympics which was announced just the day before the attacks. The bombings came two days after the beginning of the trial of fundamentalist cleric Abu Hamza, five days after the Live 8 concert, and shortly after Britain had assumed the rotating presidency of the Council of the European Union.

Four suicide bombers struck in central London (see map 6-2) on Thursday 7 July. 56 people were killed in the attack, including the bombers, and a further 700 injured. Three bombs went off at 0850 BST on underground trains just outside Liverpool Street and Edgware Road Stations, a further bomb was detonated on a train travelling between King's Cross and Russell Square. The final explosion was around an hour later on a double-decker bus in Tavistock Square, not far from King's Cross (BBC, 2005). The bombings seriously disrupted the city's transport and mobile telecommunications infrastructure at a time when, according to a London Underground spokesman, over 200,000 passengers would have been travelling on over 500 trains (in BBC, 12 July). The incident was the deadliest single act of terrorism in the United Kingdom since the 1988 bombing of Pan Am Flight 103 (which killed 270), and the deadliest bombing in London since the Second World War.

Map 4-6 London attacks location



Source: from http://en.wikipedia.org/wiki/Image:7_July_London_bombings_locations.png

Some have argued (Frey et al. (2004); Enders and Sandlers (2001)) that the media mostly pick up on those terrorist events that occur in the larger cities or the capital of the countries. However, it can be argued that the terrorists took advantage of the time and place of the attack in particular through the media coverage by staging their attack in London.

On 21 July 2005, a second series of four explosions took place on the London Underground and a London bus. However, this time only the detonators of the bombs exploded, and all four bombs remained undetonated. There were no fatalities, the single injury reported at the time was later revealed to be a hospitalised asthma sufferer. A study by Piazam and Fleischer (2001) on the impact of terrorism on Israel's tourism industry 1991-2001 showed that tourist destinations could recover from even severe acts of terrorism, as long as the terrorist acts are not repeated. However, when acts of terrorism-whether of high or low severity-occur at high frequency and regular intervals, tourism demand will constantly decrease and

eventually the destination's tourism industry may come to a standstill. However, in the case of London, because the second attempt by terrorism was not successful, the impact was not as severe as it might have been. The attacks were followed by an announcement by Al-Qaida's second in line, Ayman al-Zawahri, who claimed responsibility for the attacks in a videotape aired on the Arab television network al Jazeera (BBC 02.09.05 and wikipidia.com). Al –Zawahri said:

"I talk to you today about the blessed London battle which came as a slap to the face of the tyrannical, crusader British arrogance. It's a sip from the glass that the Muslims have been drinking from."

In the same tape, one of the suicide bombers Mohammed Sidique Khan, called himself a soldier of the war.

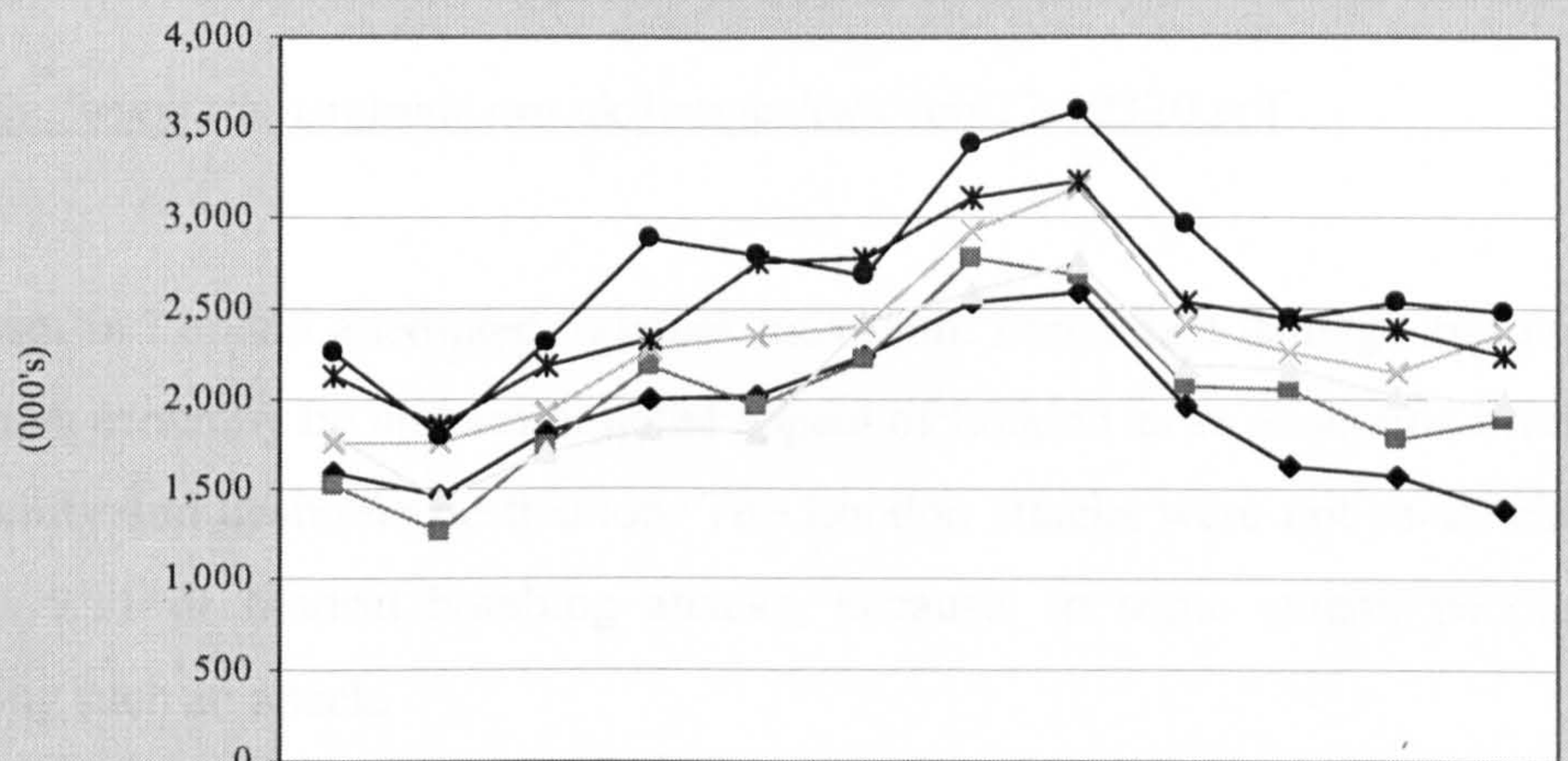
4.4.3 The impact of the London attacks on the tourism industry in UK

The 7/7 attacks on London were not aimed directly at tourists but instead were aimed at the very heart of Britain's economy, hitting the millions who travel into the capital every day to work, shop and eat (Stewart et al .(2005), the Guardian 10.09.05). The pattern of the attack also was similar to the Madrid attack, as it was a coordinated attack targeting transport systems in a capital during the peak season for inbound tourism. In terms of the scale of the attacks, however, it was smaller than the Madrid attacks. It could also be argued that the attack did not come as a shock but more as a surprise. Britain is not unaccustomed to terrorists attacks having come through the Northern Ireland conflict, but it was not used to these unannounced attacks that were designed to cause as many human casualties as possible (Poala Subacchi 2005 in Reilly et al .(2005)).

The major difference between the attacks in Madrid and London, from the point of view of the tourism industry, is that Madrid is only a small part player in Spain's economy and a significant proportion of that is business tourism. London,however, is the major gateway for tourists coming into the UK. Furthermore, the London bombs came at a time when the economy was already slowing down (the Guardian Unlimited 19.07.05) throughout the world as a result of the doubling of oil prices since 2004.

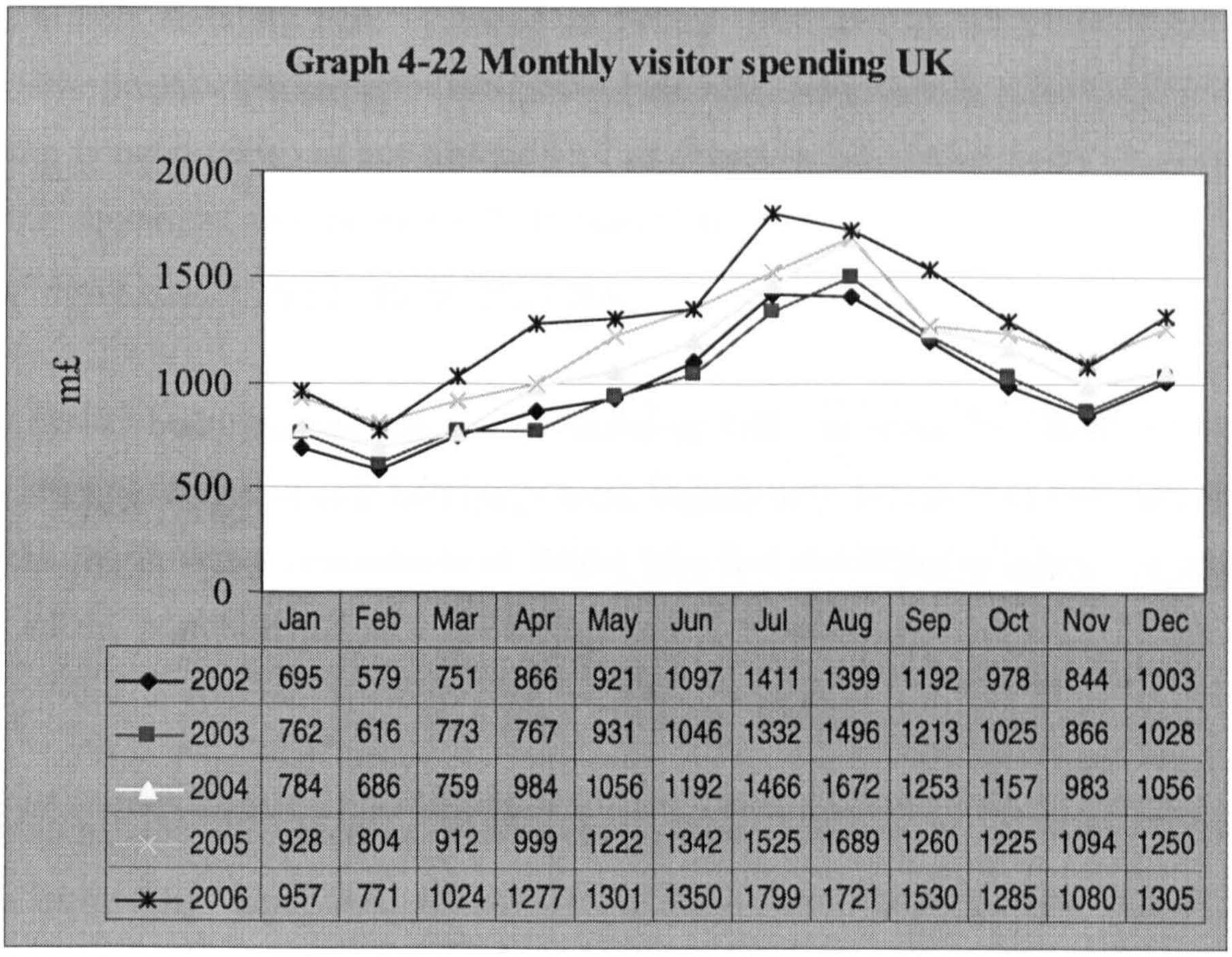
The experience from the Madrid bombing and 9/11 suggested that the negative impact of a one-off (the second attack in London had no casualties or major physical damage) incident is unlikely to have a significant long-term impact on the capital's economy. Furthermore, several economists believe that the lessons from September 11 and the Madrid bombings are that major economies can absorb such shocks, where traders had been expecting something like this for some time because of the world situation (Jeff Randall, BBC business editor 07.05.9; Gordon Brown in 24.9.05 BBC). Rand Morimoto argued that, after the bombing in the UK, many people's attitudes have hardened and become more resilient, since such attacks have become more familiar and the bombings do not change the risk of travel (eg. Rand Morimoto, 2005 Frangialli, 2005). According to the national statistic data (see graphs 4-21 and 4-22) the year on year monthly arrivals and spending in 2006 were subject to steady growth.

Graph 4-21 Montly visitor arrivals to the UK 2000-2006



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	1,589	1,455	1,820	2,008	2,024	2,247	2,546	2,589	1,965	1,631	1,582	1,381
2002	1,527	1,261	1,737	2,181	1,966	2,228	2,782	2,694	2,079	2,061	1,774	1,889
2003	1,792	1,446	1,705	1,833	1,823	2,417	2,588	2,766	2,180	2,170	2,011	1,983
2004	1,765	1,757	1,927	2,270	2,347	2,406	2,934	3,162	2,404	2,264	2,154	2,365
2005	2,132	1,850	2,189	2,331	2,767	2,770	3,117	3,205	2,537	2,447	2,388	2,237
2006	2,266	1,794	2,310	2,884	2,801	2,685	3,411	3,597	2,961	2,450	2,530	2,480

http://corporate.visitlondon.com/ems/images/1monthlytrendssep2006.pdf



http://www.tourismtrade.org.uk/Images/tws_tcm12-12320.pdf

Terrorism in London attempted to cause maximum immediate damage and puncture the British economy by undermining the appeal of London as an economic investment opportunity and desirable destination. The London attacks were not as shocking as, say the 9/11 or Madrid bombing attacks, because, to some extent, people were expecting such an attack.

Overall, the economic loss to the country emanating from the attack (particularly in terms of the tourism industry) was not significant. London is 'unique' in many aspects, since it can not be easily substituted by any other destination. The figures proved that the impact was minor; however, the attack might have changed the cultural values and attitude of British and in particular Londoners.

4.4.4 The response to the London attacks

In the opinion of former Metropolitan Police Commissioner Lord Stevens of Kirkwhelpington, before the identity of the bombers became known, the bombers

were almost certainly born or based in Britain. The attacks would have required extensive preparation and prior reconnaissance , and a familiarity with bomb-making and the London transport network as well as access to significant amounts of bomb-making equipment and chemicals (BBC web 10.07.05).
http://news.bbc.co.uk/1/hi/uk/4668675.stm

On July 17th bombing suspects were rounded up and it emerged that three of the four men blamed for the suicide bombings were British-born Muslims of Pakistani origin and the fourth was a Jamaican-born Briton who had converted to Islam. It brought fears of the possibility of an anti-Muslim backlash among the country's 1.6 million-strong Muslim community. According to Louise Bruguiere (Le sheriff) on 26 August 2005 in the Financial Times in common with Spain and its large Moroccan population, the UK faces a particular problem because of its large Pakistani population. The importance of radical Pakistani-based organizations linked to al Qaeda and operating around the world, notably in Europe, is another remark that can be made; Louise Bruguiere added that " the UK is more affected by this problem than any other state".

Efforts were made to get Muslim leaders to condemn the attacks, in part to mitigate any damage between Muslim and non-Muslim communities in the UK and in part to reassure people that there was a major groundswell of people against the attacks. According to Iqbal Sacranie, head of the Muslim Council of Britain (19.07.05)," a very, very small minority" of British Muslims espoused extremist views. This researcher suggests that it makes no difference as long as the small minority are capable of acts against the major community. Resulting from such acts there will be a negative perception of the public towards Islam and consequently to the Muslim community. According to Sacranie (19.07.05),

"The evil people who planned and carried out this series of explosions want to demoralize us as a nation and divide us as a people. All of us must unite in helping the police to capture these murderers. We must remember the victims will have been people of all faiths, all races and many nationalities".

The political response in the UK was consistent, with politicians from different political parties united in their condemnation of the attacks. The history of such terror attacks in the UK suggests that, in the short term at least, people are more likely to

unite behind the government (BBC web 07.07.05). The UK's Prime Minister Tony Blair described the attack as barbaric and added:

"Our determination to defend our values and our way of life is greater than their determination to cause death and destruction to innocent people and their desire to impose extremism upon the world"

The Mayor of London, Ken Livingstone called it a "cowardly attack" (07.07.05):

"In the days that followed, look at our airports, look at our sea ports and look at our railway stations and, even after your cowardly attacks, you will see that people... will arrive in London...whatever you do, however many you kill, you will fail".

The Conservative leader at the time, Michael Howard, and the then Liberal Democrat leader Charles Kennedy, united to insist that the terrorists would not succeed in their aim of demoralizing the nation (BBC web 07.07.05). Howard said:

"What is important is to make it absolutely clear that this country is united as one in our determination to defeat terrorism and to deal with those who are responsible for the dreadful acts that have taken place in London".

A poll published by the Guardian newspaper revealed that two-thirds of Britons believed the London bombings were linked to the UK's role in the war in Iraq (CNN 20.07.05). If this is the case then clearly people's travel risk perceptions would be heightened so long as the Iraq conflict continued. Ken Livingstone, the mayor of London, suggested that decades of British and American intervention in the oil-rich Middle East had motivated the London bombers (H:\autum\taking the blame.htm. and BBC 20.07.05). Livingstone added:

"I think the particular problem we have at the moment is that in the 1980s... the Americans recruited and trained Osama Bin Laden, taught him how to kill, to make bombs, and set him off to kill the Russians and drive them out of Afghanistan, they didn't give any thought to the fact that once he'd done that he might turn on his creators,"

On 19th July 2005 Blair used a press conference with Hamed Karzai, the Afghan president, to dismiss the suggestions that Britain's involvement in Iraq and Afghanistan had provoked the attacks, he said (CNN 19.07.05):

"Of course these terrorists will use Iraq as an excuse but let's be clear: if it wasn't that, it would be something else and nothing, but nothing, justifies what they are doing. September 11, of course, happened before both of those things and then the excuse was American policy, or Israel."

4.4.5 Security response

The London attacks not only increased security in the UK, but also acted as a catalyst to introduce legislation that would toughen the country's antiterrorism measures. The UK's government believes people from any nationality staying in the UK have to abide by the rules and must not incite others to kill innocent people (BBC, 16 .09.05). Blair believed that the rules have not been tough or effective enough, in sending a strong signal across the community that the British government is not going to tolerate people engaging in terrorism or propagating it.

Several sources acknowledged that the authorities have not always been successful in providing effective security. Indeed, it can be acknowledged that problems associated with security are never 100% solvable (Hall, 2002). Pool Jr. (2001) noted that policymakers should admit that nobody yet has the answer for implementing more effective and affordable security. The greatest calls for action against terrorism come immediately after the attacks.

One of the problems facing the authorities relates to the scope and variability of attacks. If the authorities tighten up in one security area, the terrorists will simply target another (Sandler, Tschirhart and Cauley (1983); Enders et al. (1993)). Increased US embassy security led to a decrease in attacks, which usually resulted in no injuries but led to an increase in the number of assassinations of embassy personnel as they left secure grounds (Enders et al. 1993). Thus, it is essential for authorities to impose strategies that cause the terrorists to substitute less harmful modes of attack by limiting terrorist resources or through intelligence.

According to Blair (2005), the possibility of terrorist attack from al-Qaeda was "real and serious". In March 2004, the then Metropolitan Police commissioner Sir John Stevens described an attack as "inevitable", and said police had intercepted several attempted plots (BBC 07.07.05). Spending on security rose from an annual £950m ($1.7bn) before 2001, according to Chancellor Gordon Brown, to £1.5bn in 2004-05 to reach £2.1bn by 2007-08. So far, £56m has been spent on mass decontamination units for use in chemical, biological, radiological or nuclear (CBRN) attacks. Such

measures may help provide support for when an attack occurs but the fact that they are put into place can have negative effects on the travel risk perceptions of tourists.

Following the 7/7 attacks the Metropolitan police commissioner Sir Ian Blair said it was a situation "for which we have planned and prepared". However, a two-year study by eight leading academics in February 2005 found that there were holes in security in the UK's transport sector, emergency services were under-funded, the private sector was largely under prepared and that regions outside London were falling behind in preparing for an attack.

Some of the new plans proposed by Charles Clark (UK, Home Secretary) to the government included:

- Hold terror suspects for up to three months without charge;
- Powers to ban organizations which glorify terrorism and to prosecute "extremist" bookshops which sell terrorist propaganda or handbooks;
- ID card plan (however, some critics accuse the government of using the threats to push through unpopular measures such as control orders and ID cards)
- Change in immigration rules meaning that anybody applying for British citizenship would have to be "of good character"
- The idea of a "supergrass" system to allow terror suspects to give information to police and security services was also considered.

4.4.6 Emergency response

Civil protection in the UK is based on the concept of integrated emergency management. Under integrated emergency management, both preparation for and response to emergencies focus on the effects of events rather than causes (emergency response and recovery by HM Government 2005). The impact of terrorist events on public confidence, and the possibility of further attacks, makes the provision of warnings, advice and information to the public particularly important.

Because of the complex nature of the 7/7 attacks, security measures increased sharply and Cabinet Office Briefing Room 'A' was "activated" within minutes of the first reports of explosion, and remained open around the clock for over a week.

Following 9/11, an inter-agency team, London Resilience, was set up. This agency had prepared for attacks of this nature over the intervening years with 6 large-scale exercises and 32 table-top exercises. This emergency planning proved crucial in the response to the London bombings on July 7 and the second, failed attempts a fortnight later. Liberal Democrat leader Charles Kennedy said (News.scottman.com 07.07.05):

"As ever, the emergency services have performed magnificently in difficult and dangerous circumstances. We owe them an overwhelming debt of gratitude."

The emergency services were widely praised - by the Queen and the Prime Minister, among others. The response made, almost everyone agreed, was swift and effective (Guardian Unlimited 10.08.05).

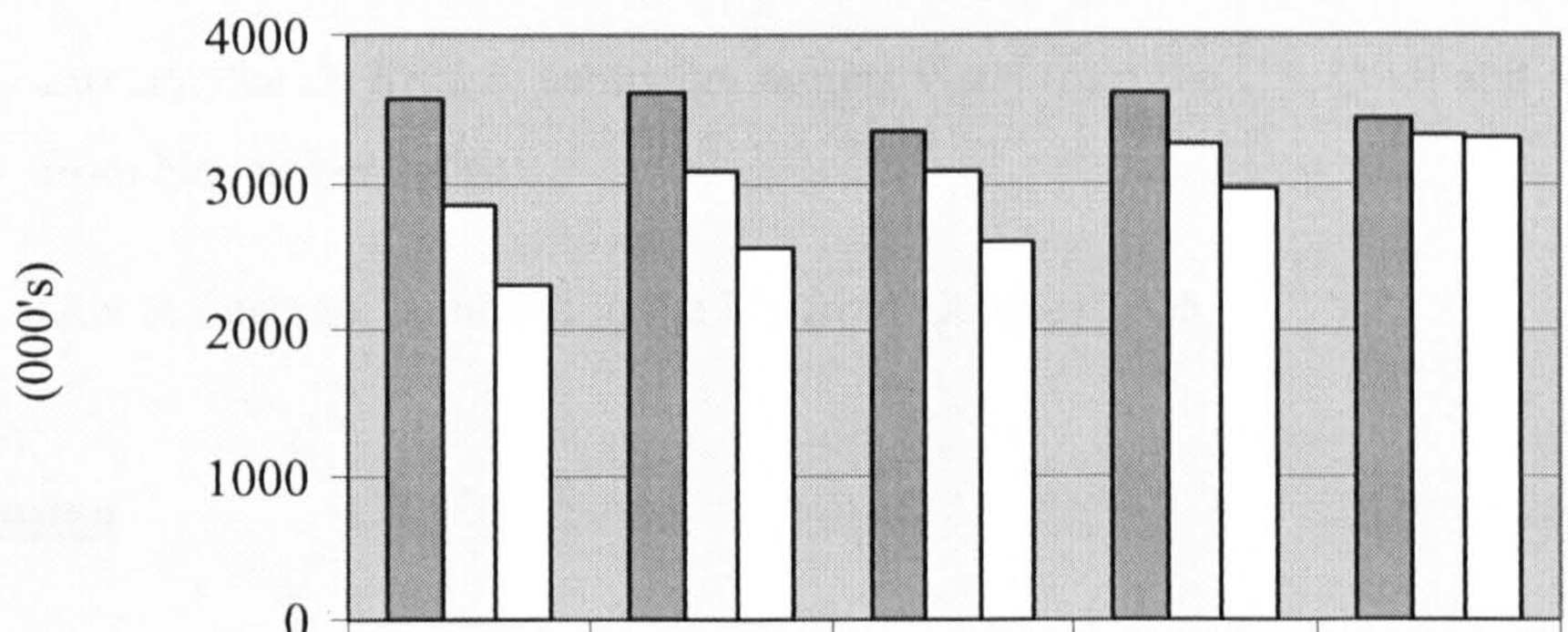
Overall, the evidence shows that the emergency and security services were well prepared for such an attack both in terms of training and resources (spending on security was raised from £950m to £1.5bn in 2004-05). However, the 7/7 attacks in the UK showed that a well-prepared plan could minimise the negative impact although it demands huge investment, which is not easy for many countries.

4.4.7 Marketing response

The attack on the London transport system had little immediate effect on tourism (see graph 20-21 and 20-22), but the longer-term economic impacts depend on Britain's ability to attract visitors, especially the "more risk averse" Americans (Sinclair, 2005). American tourists have a reputation for being more risk averse with respect to terrorist incidents. American tourists also tend to be high-spending tourists, so they have a disproportionate effect on the destination economy and as a result London could suffer. According to the late Thea Sinclair, University of Nottingham, London is dependent on American Tourists (see graph 4-23). Whereas the 70% of visitors from Europe account for around 50% of spending, the 13% of visitors from the USA account for 18% of total spend. This mean that the average American visitor contributes about twice as much as the average European visitor. Furthermore, the

income levels that make for this difference means that the high spending tourists can seek alternative lower risk destinations more easily.

Graph 4-23 Top three countries visits to the UK



	2001	2002	2003	2004	2005
USA	3580	3611	3346	3616	3438
France	2852	3077	3073	3254	3324
Germany	2309	2556	2611	2968	3294

Source: adapted from Visit Britain (2005)

Because of the importance of American tourists to the tourism industry in the UK, Visit Britain and Visit London launched a multi-million pound marketing campaign across the USA on 13 September following the attacks, using radio, print, online and outdoor media, as well as live "US" radio broadcasts from London. Visit Britain with American Airlines and Thistle Hotels offered price-driven London packages between October and March.

A similar campaign was launched in France, Germany, Italy, the Netherlands and Spain and ran into March 2006, while activities still continue in Japan, Russia and China. Visit Britain as part of marketing England internationally promotes 30 key English cities in France, Germany and the Netherlands.

Visit Britain took advice from its counterparts in New York and Madrid, both cities having suffered from terrorism.

"Both New York and Madrid tourism said [to] do nothing at first, let people come to terms with what's happened before going into the marketplace and saying, 'Right, London's ready to get on'."

Internationally, Visit Britain conducted marketing campaigns in many different generating markets as follows:

- A new Cities Campaign - including London - launches in the UK and all main international markets from September 2005:
- Luxury: the *So British* campaign targets visits from the US, UAE and Russia from November 2005;
- Gay & Lesbian: launched in the US from October 2005;

Conclusion

All three industrialised countries were subjected to significant terrorist attacks. None of them were aimed purposely at the tourism industry and yet all three attacks used the very lifeblood of tourism, the transport networks. In the USA, where the transport system was used actively as missiles, there was significant damage done to property, loss of human life and loss of standing for the world's greatest economic and military power. The transport systems in Spain and the UK were used passively, in that they were the targets of the attacks and the loss of human life was significantly less.

These attacks, in spite of not being targeted at tourism, increased people's risk perceptions of travelling. In fact the airline industry was altered significantly by the nature of the 9/11 attacks and the changes to check-in, luggage and aircraft systems are all a direct result of that. It is more difficult (from a practical point of view) to increase the security on the trains and buses that were the locations for the Madrid and London bombings. To try and offer the same security levels as that offered by airlines would bring the transport systems to a grinding halt. Therefore, if anything, the real risk to travellers on trains and buses is perhaps greater than that experienced by airline passengers in this post 9/11 world. Table 4-7 examines the similarities and differences between the bombings in London and Madrid.

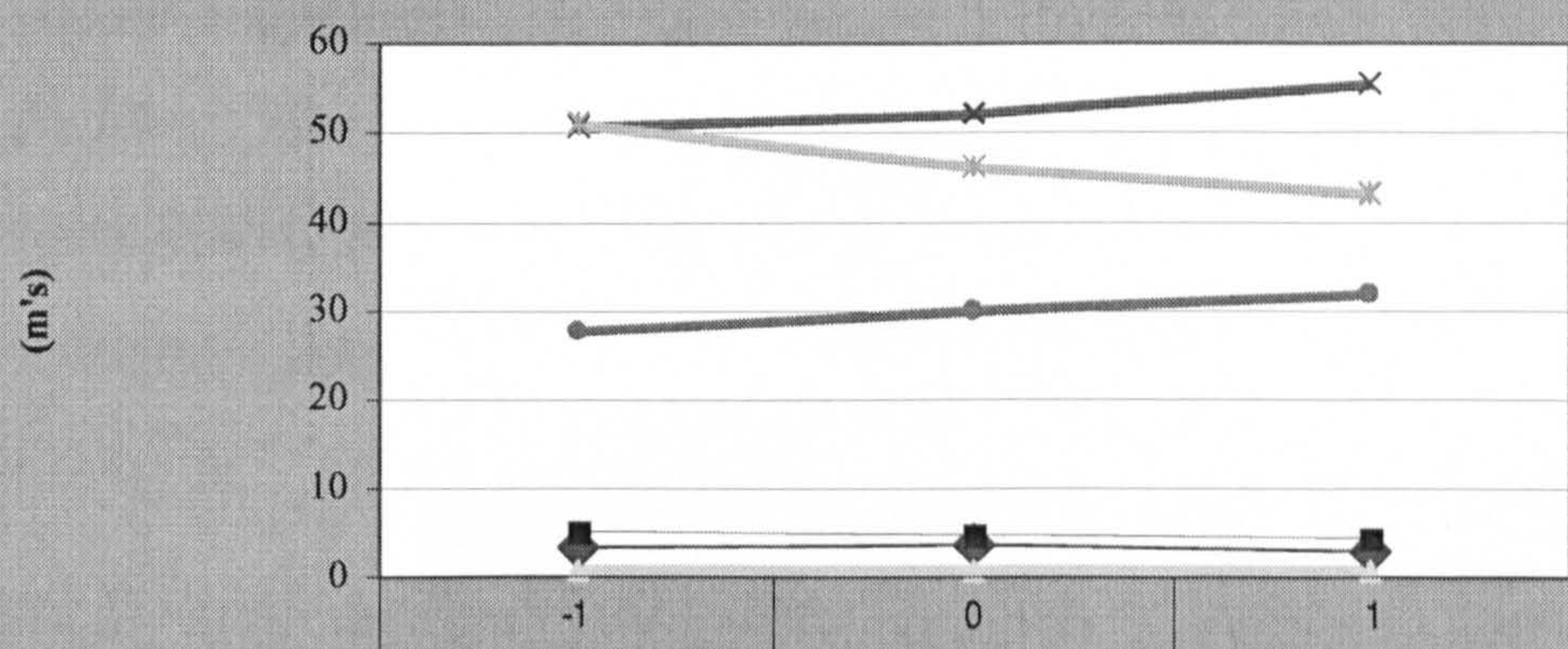
Table 4-7 Comparison between London bombings and Madrid bombings

Major Similarities	Main difference
Target urban transport	More casualties in Spain (4 times) than UK
The rush hour	The attack surprised Spain, it was less of a surprise in the UK
Innocent people from a range of countries	Timing was much worse for Spain
Both in Europe and developing countries	Madrid is not the main destination in Spain, London works as an engine for UK's tourism industry
Both countries had terrorist attack in their history (ETA,IRA)	London bombings provoked instant domestic political unity in UK; in Madrid have had the opposite effect.
	The relatively slowness with which the London police have identified the victims and published their names, in Madrid they were issued within an hour.
	Public response (Calm ,dignity and resilient of British) and much different picture in Spain
	The number of previous terrorism casualty is far more in UK (4000) than Spain (800)
	The bombed London trains were all underground and invisible.

All six countries made extensive marketing campaigns in their traditional markets and enhanced security to restore visitor confidence, but they all had to cut prices to entice visitors back - these visitors may not be the same as the original ones and may have lower spending patterns.

Some have suggested that the economic loss to the USA was in the range of $80 to $90 billion (including economic loss of wages, compensation and reduced commerce) (Kunretuther, Michel-Kerjan, and Porter 2003). Although a significant sum, the cumulative cost of terrorism from 9/11 is small in relation to US GDP, which exceeds 10 US$ trillion (Sandlers and Enders, 2005). The effects of terrorism , in smaller economies where tourism is the major driver of the economy can be expected to be larger. Terrorism could reduce GDP and limit the growth by increasing the risk of travel and so reducing tourism arrivals (see graph 4-24).

Graph 4-24 Arrivals where -1 is the year before the attack 0 is the year of the attack and 1 is a year after the attack



	-1	0	1
Egypt	3.2	3.8	2.8
Indonesia	5.1	5	4.4
Kenya	0.84	0.83	0.92
Spain	50.8	52.4	55.5
USA	51.2	46.2	43.5
UK	27.7	29.9	31.8

Source: adapted from UNWTO 2007

Although some have argued that the size of an economy (GDP) has got much to do with the ability of a country to resist terrorist attacks (Sandlers and Enders, 2005), the evidence from the case studies outlined in this and the previous chapter is not conclusive. Countries such as Kenya, Spain and the UK all recovered their pre-attack positions quickly, whereas Egypt, Indonesia and the USA did not.

Chapter 5

The Middle East and Iran

Introduction

The previous two chapters have drawn upon case study countries from both the developed and the less developed world. The chapters have illustrated the way that events can affect the flow of tourism through changes in travel risk perceptions. In all six case study countries, the occurrence of terrorist acts caused travel and tourism to suffer. Some countries were affected more over longer periods of time than others, but all were affected. One could find similar effects on travel and tourism flows through natural disasters such as hurricanes or Tsunamis or when there are outbreaks of disease that could endanger travellers (such as SARS). All of these events will enter into the travellers' decision making process and, either consciously or sub-consciously, they will affect the perceived level of travel-related risk.

When looking at the various regions of the world, there are some regions where there are perceived to be greater risks of a specific nature and others where such risks may not even enter into the mind of the tourist. For instance, there are probably not many tourists who become concerned about the risk of hurricanes when booking their trip in Europe. However, there may be some concerns about such natural phenomena if they are considering booking a vacation between June and November in the Caribbean. Similarly, one might expect that if people are travelling within their own region of the world, they may have lower travel-risk perceptions than if they are travelling to a different region with greater unknowns and less familiarity. This is because the assessment of travel risk may be considered relative, with people judging the risk of a potential destination based on their own sense of norm.

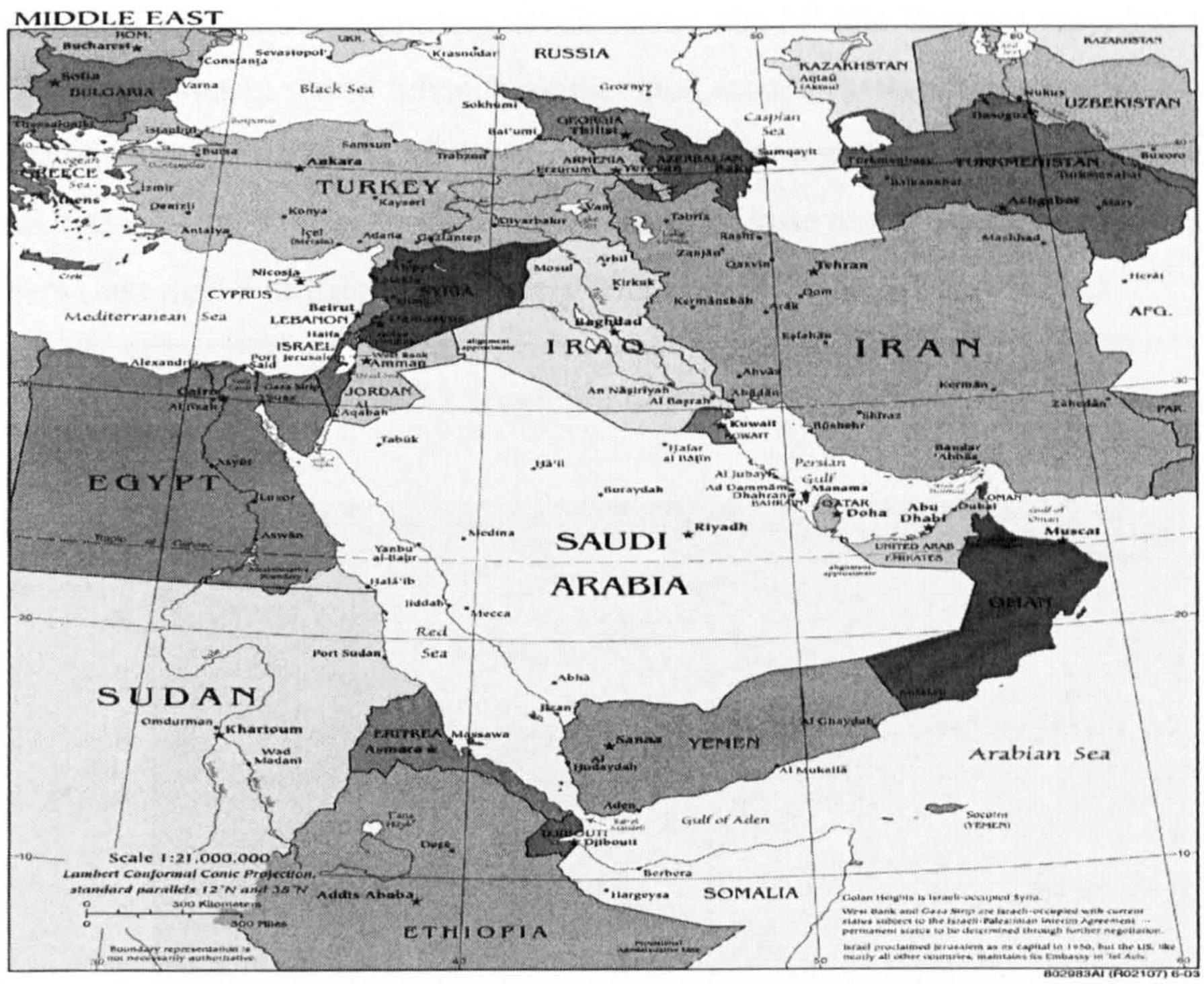
Stereotypically, regions can be assumed to be subject to higher travel-risk perceptions with respect to particular issues. For instance, Africa may give cause for concern because of the risk of disease, particularly AIDS. South America may give cause for concern about the level of crime. Finally, the Middle East may give rise to enhanced travel-risk perceptions because of political unrest and terrorism. These stereotypes may have some substance in reality or they may not, but the stereotype alone is enough to affect travel-risk perceptions. This chapter examines the factors that may give rise to enhanced travel-risk perceptions in the Middle East in general and to Iran in particular.

5.1 The Middle East

The image of the Arab world as gleaned through the eyes of Western media is largely negative (Aaziz (2001) in Harrison, 2001). Islamic society tends to be painted from a palette consisting mostly of stereotypes of patriarchal oppression, harsh environments, religious fundamentalism, political unrest, cultural intolerance and irrational violence. Not surprisingly, these views have done little to encourage the growth of tourism to the Middle East. Even within the Middle East there are differences in terms of the way that the authorities react to this poor growth in tourism activity. To some of the Middle East the low volume of tourism coming from outside the region is a source of economic disappointment, whereas to others it is seen as a blessing, such as the case of Iran where there may be fear that Western tourists will have a detrimental impact on the traditional Islamic culture (Harrison, 2001).

Unlike most other regions of the globe, the Middle East (see map 5-1) is characterized by a Hobbesian state of nature where war and conflicts seem to be inevitable and endemic. However, the Arab-Israeli dispute has been the most dominant enduring feature of the post–World War II Middle East. Nevertheless, conflict in the region has been multi-faceted. It is not only about state-to-state war, but also about internal including tensions , political violence, low intensity conflict, political failure, high level and continual propaganda, political and economic sanctions, disputes over resources, resistance to occupation and an ingrained culture of antagonism (Milton-Edwards and Hincheliffe, 2001). Dobson and Marsh (2001) describe the Middle East as "a theatre of violent competition and high stakes". Policies in the region have struggled to keep pace with USA economic expansionism, containment, fears of over-extension and oil supplies, discordant allies, decolonisation, nationalism, Zionism and Islamic fundamentalism. It is the region in which the limits of unity and diplomacy are put to the test and often found wanting.

Map 5-1 Middle East



Source: from http://www.lib.utexas.edu/maps/middle_east.html

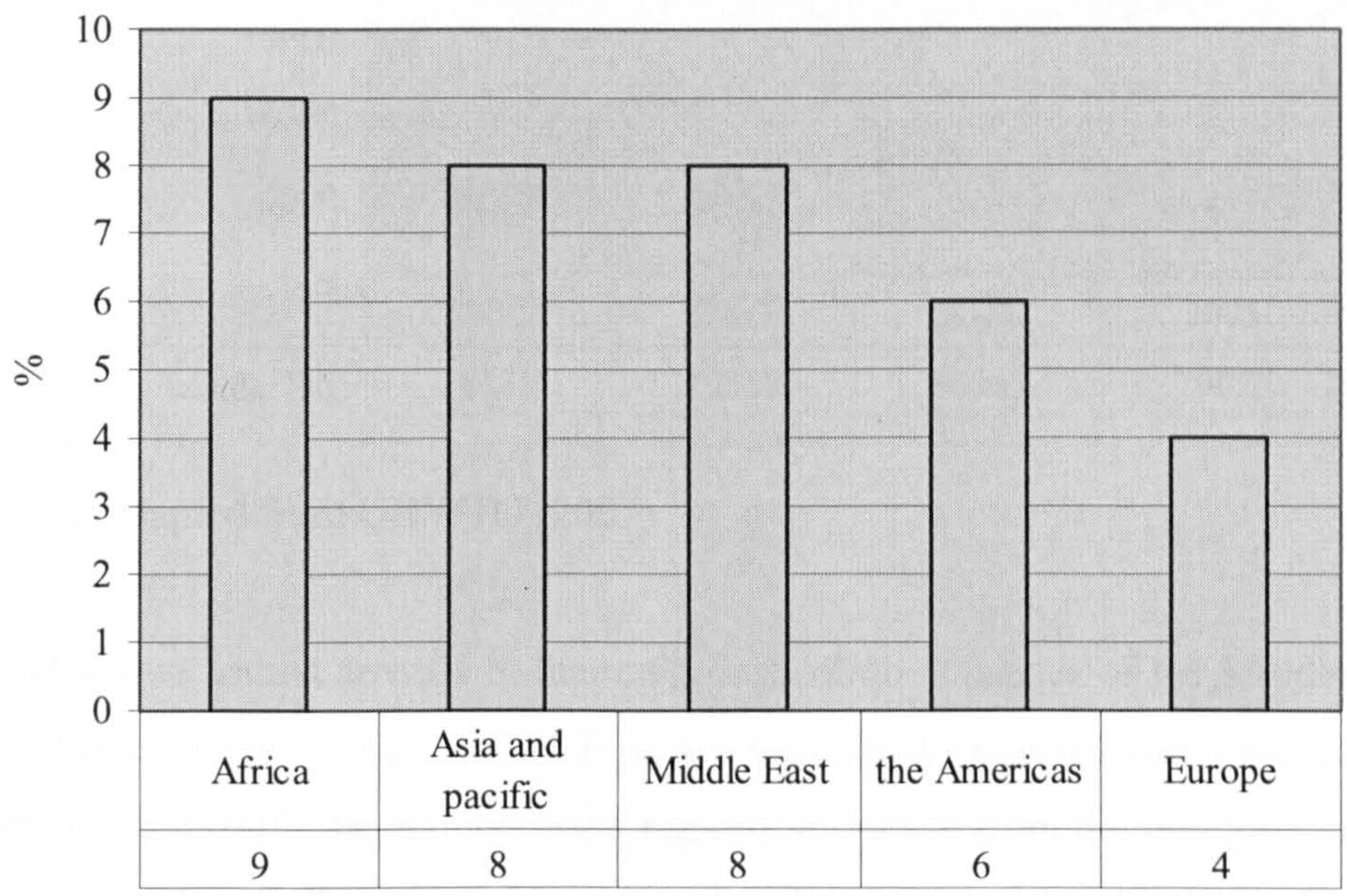
The countries that make up the region of the Middle East sometimes depend upon the purpose of describing the region. As a geographical area it is a land that has witnessed much of the history of the human race. It includes countries such as Libya, Egypt, Israel, Lebanon and Iran. When one visit Perspolis in Iran, Petra in Jordan, the Pyramids in Egypt, Tadmore in Syria, or Bethlehem in the Israel, 'one lives the history' (Alavi and Yasin, 2000). In reality, the Middle East offers a vast collection of unique tourist sites and can justifiably be referred to as one of the world's original and most significant tourist attractions. Blach, Roblit, Levine, and McConnel (1996) reported:

> "Many people rank the region's attractions among the most important places to visit in the world. The opportunities for expansion of cultural tourism, given the region's concentration of religious and historic sites, can hardly be overestimated. At the same time, there are tremendous opportunities in leisure tourism development that capitalize on the region's suburb climate and other natural gifts (pp.5-6)"

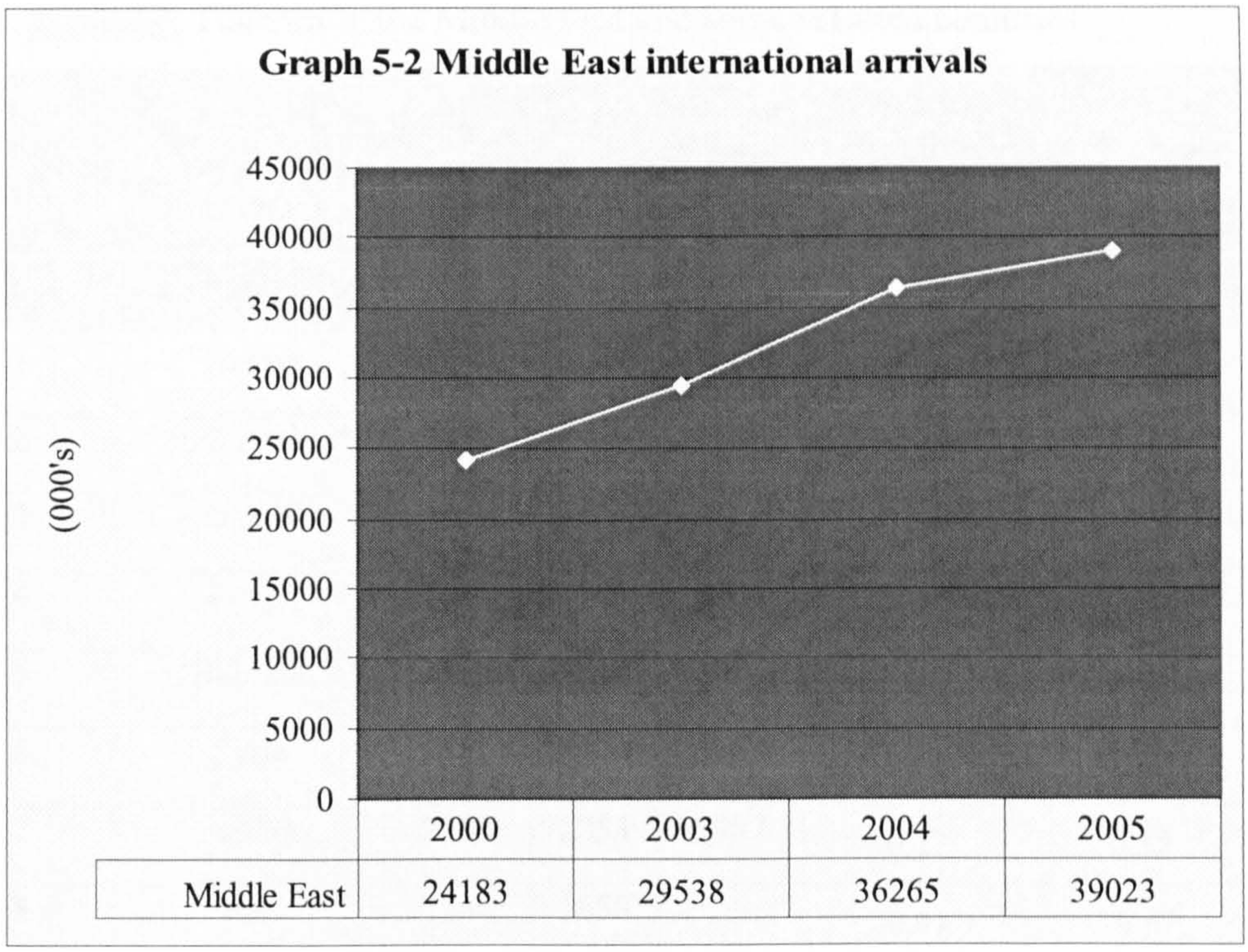
In addition to the heritage offered by the region, the climate is also conducive to a wide range of tourism activities for a large part of the year.

In spite of the hindrances to tourism development, the Middle East has recorded quite strong growth rates in recent times, ranking equal second fastest growing, along with Asia and the Pacific (2004-5). However, it should be remembered that this strong growth rate is being applied to quite a small tourism base and the actual growth in numbers (less than 3 million) is relatively small (see Graphs 5-1 and 5-2).

Graph 5-1 Regional growth 2005 -2004



Source: adapted from UNWTO (2007)



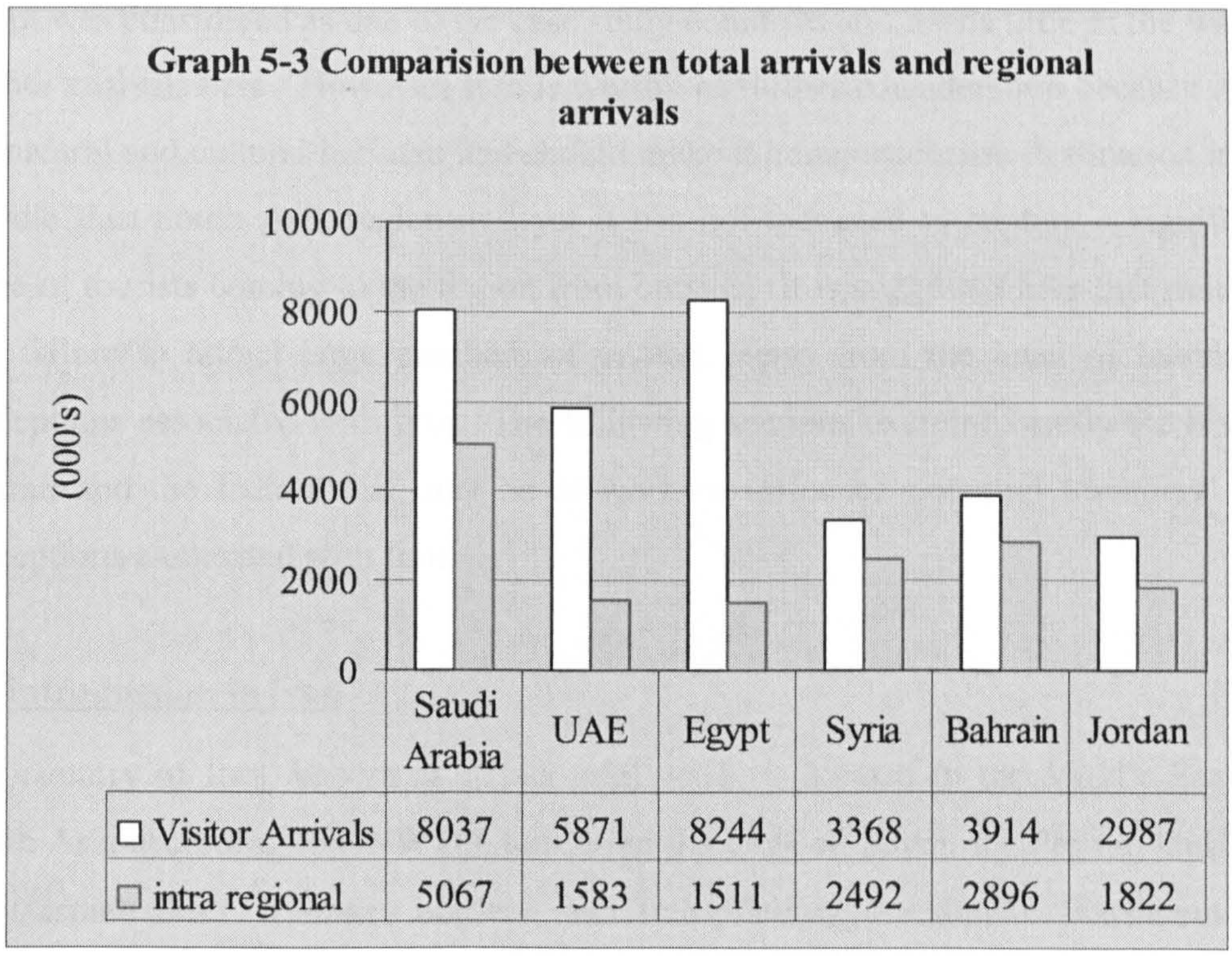
Source: adapted from UNWTO (2007)

Table 5-1 shows tourist arrivals in the main destination countries of the Middle East. Most of the countries in the Middle East are dependent upon intra-regional tourists and have limited traffic from outside the region. Evidence from the literature and the surveys undertaken in this research suggest that the perceived levels of travel-related risk increases if the destination is outside the region of the traveller's normal place of residence. Take this factor and add to it the specific concerns regarding travel to the Middle East and this provides some explanation for the region's relatively poor inter-regional tourism traffic. The exceptions to this being Egypt, which has an abundance of unique attractions and has had a more favourable political situation for western visitors than many of its neighbours, and the Emirates that have continued to increase their share of tourism from Europe (See Table 5-1; Graph 5-3 and 5-4).

Table 5-1 Tourism in the Middle East and some selected countries

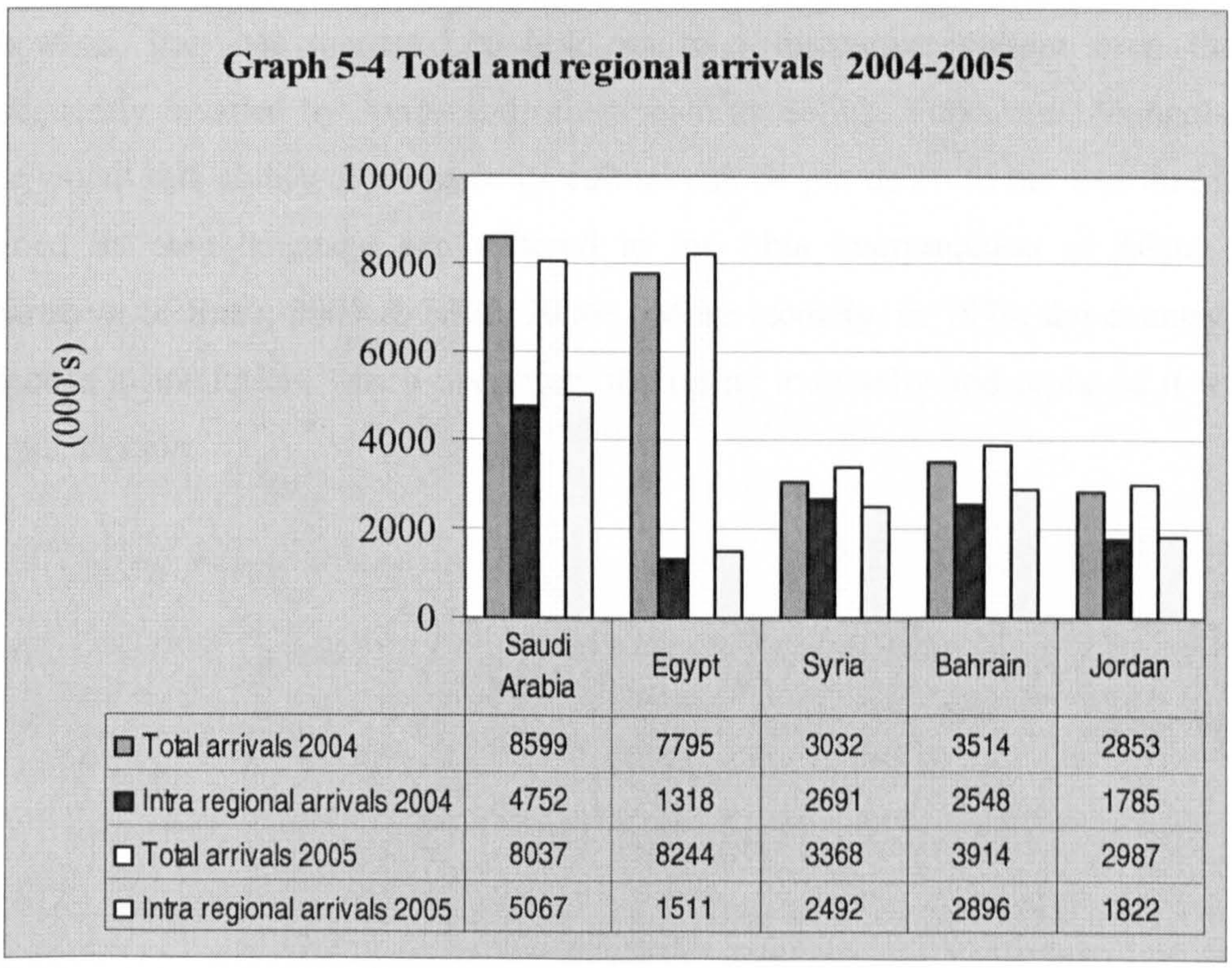
Rank	Country	2003	2004	2005	Political stability	Control of corruption
			000's			
1	Turkey	13341	16826	20273	-0.60	-0.23
2	Saudi Arabia*	7332	8599	9100	-1.63	.15
3	U.A.E	5871	------		0.91	1.23
4	Egypt	5746	7795	8244	-0.72	-0.21
5	Bahrain	2955	3514	3914	0.06	0.76
6	Syria	2788	3032	3368	-0.66	-0.74
7	Jordan	2353	2853	2987	-0.12	0.35
8	Iran	1546	1659		-0.91	-0.59
9	Israel	1063	1506	1903	-1.01	0.79
10	Oman	1039	1195	----	0.76	0.78
11	Lebanon	1016	1278	1140	-0.83	-0.51
12	Qatar	557	732	----	0.92	0.55
13	Yemen	155	274	336	-1.48	-0.84
14	Libya	142	149		-0.02	-0.91
15	Kuwait	94.00	91.00		0.29	0.71
17	Palestine	37	56	88	-1.33	-0.60
16	Iraq	---	---	---	-2.87	-1.45

Source: adapted from UNWTO 2006 and adapted from World Bank (2006)



Source: adapted from UNWTO 2007

*UAE is for 2003



Source: adapted from UNWTO 2007

Egypt was considered as one of the case study countries and needs little in the way of further analysis here. However, Iran is worthy of further consideration because it has the natural and cultural heritage that should make it a major tourism destination in the Middle East/South Asia region and yet it has not managed to capture a significant share of tourists coming to the region from outside. It is suggested here that much of this failure to attract large numbers of visitors stems from the level of travel-risk perceptions associated with Iran. The following sections examine briefly the history of Iran and the factors that may be at work to influence potential travellers' risk perceptions associated with Iran.

5.2 Introduction to Iran

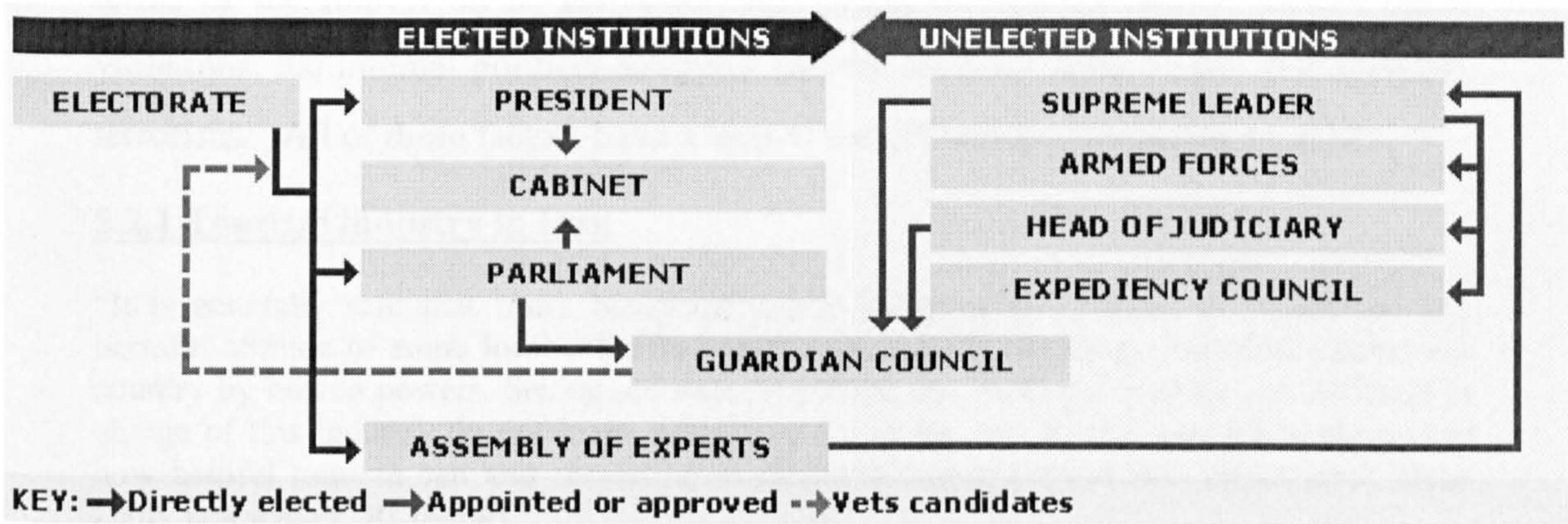
The country of Iran, known as Persia until 1935, is located in the Middle East (in South Asia according to UNWTO, bordering the Gulf of Oman, the Persian Gulf and the Caspian Sea. It shares borders with Iraq, Turkey, Azerbaijan, Turkmenistan, Armenia, Afghanistan, and Pakistan (See map 5-2). Persia, as it was, had been one of the greatest empires of the ancient world, and one of the first countries to be occupied by the early Islamic armies, coming out of Arabia in the 7th century. In spite of this occupation, Iran has managed to hold on to a distinctive culture even though subsequently invaded by Arabs and others such as Seljuk, Turks, and Mongols. To some extent this ability to preserve its culture can be put down to the fact that it has retained its own language and adhered to the Shia interpretation of Islam (U.S Department of State, 2005 & BBC, 2006). More recently, in 1979, the country was subject to a revolution, which overthrew the ruling monarchy and replaced it with a republican state.

Map 5-2 Iran

Source: from fact monster (2006)

One of the hindrances to tourism development can be seen in the establishment of the conservative clerical forces' theocratic system of government, providing ultimate political authority which has been nominally vested in a learned religious scholar. The Government of Iran today is dominated by Shi'a Muslim clergy. (See chart 5-1) (CIA, 2006).

Chart 5-1 Iran's complex political system



Source: BBC (03, 08, 2005)

The period since the revolution has not been one that has been conducive to fostering tourism development. Difficulties in relationships between the US, including the seizure and holding of the US Embassy in Tehran for 15 months and a calamitous war with Iraq from 1980 through to 1988 , did much to overshadow the early 20th Century image of Persia as an attractive destination for Western visitors. Iran has even been given special designation by the US for its state sponsorship of terrorism in Lebanon and elsewhere in the world and, consequently, remains subject to US economic sanctions and export controls because of its continued involvement.

Iran's economy relies heavily on oil export revenues, which accounted for around 80-90 percent of total export earnings and 40-50 percent of the government's budget. Iran ranks as the second largest supplier of natural gas in the world after Russia and presently ranks fourth in the world in terms of proven oil reserves (BBC 08.03.06). It has the second largest population (after Egypt) in the Middle East and North Africa region and most of its 65.5 million people are young (World Bank, 2006 http://www.atiehbahar.com/Resources/Oil&Gas.htm).

Following the revolution, Iran's image has been tainted by a significant amount of negative publicity, mainly as a result of its confrontations with the USA, which has consistently branded the country as one of the world's top trouble spots and part of an "axis of evil" which has done little to lower travel-risk perceptions of potential western visitors.

The 8 year war with Iraq was expensive not only in terms of casualties, but also in terms of the impact on its resources and image, the accusations of human rights violations, the internal political struggles and the label of being a state that sponsors terrorism. All of these factors have added to the difficulty of attracting tourists.

5.2.1 Tourism industry in Iran

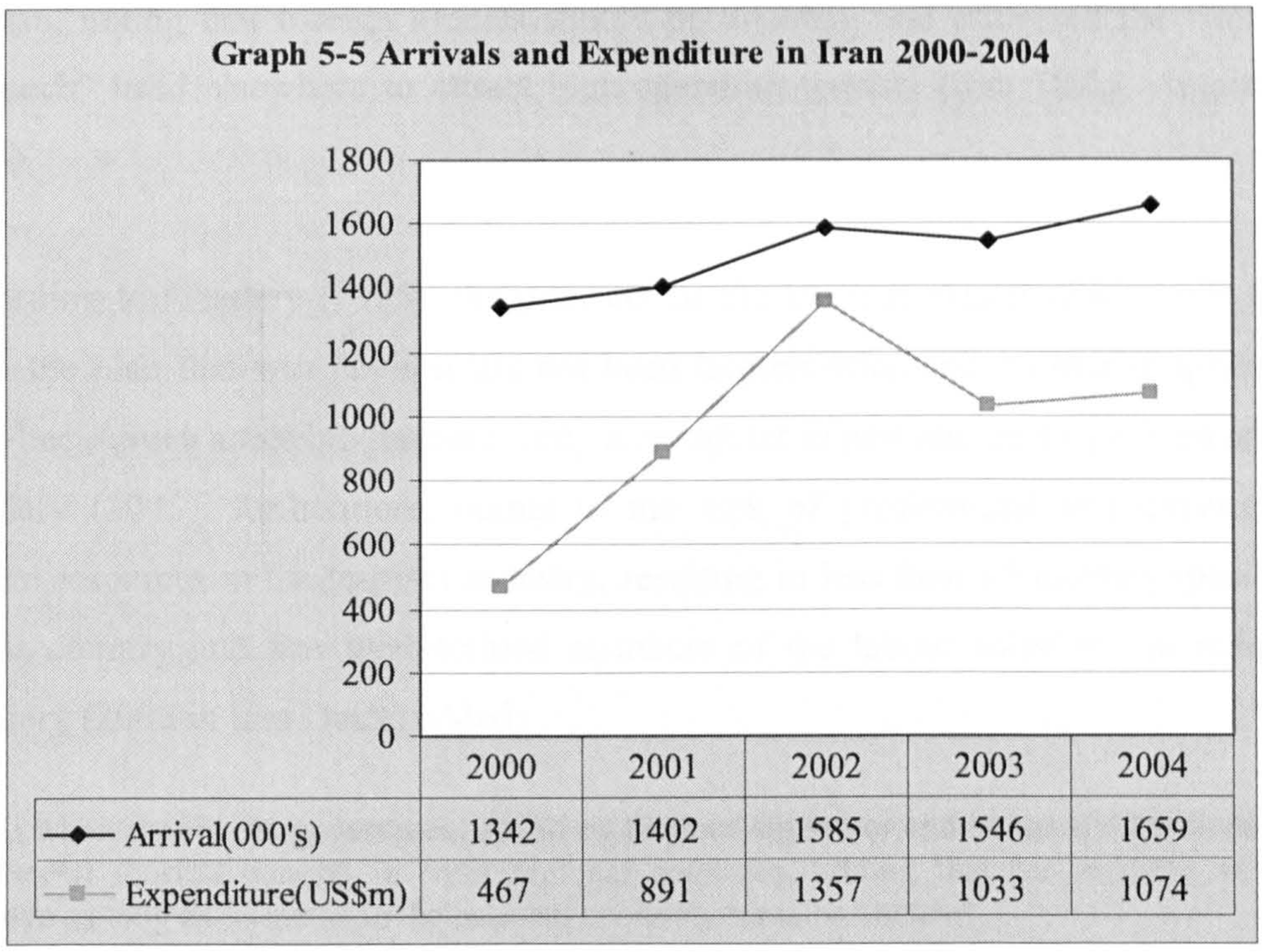
"It is generally said that Iran's backward tourist sector is the product of ill-advised and harmful attitude of some local officials and the propaganda campaign launched against the country by hostile powers. Seeing the state of affairs, one is bound to think that officials in charge of this industry do not know what they are in for, nor do our policy-makers realize how helpful tourism can and should be in attaining higher growth and create jobs". (Iran Daily newspaper, 30, 09.04).

Iran has attracted tourists ever since the days of Marco Polo and its position as a land bridge between Asia Minor and Asia proper has made it an essential point of transit

for thousands of world travellers for purposes of trade, religion or leisure. The country's environmental assets, and exotic culture, combined with a climate and heritage assets, provide it with an ideal platform from which to develop diverse and unique tourism products.

However, this potential development has never been fully realised. Iran lags behind many countries in launching its tourism industry onto a significant growth path. It certainly has the assets that could make it one of the most important tourism destinations in the region. The political situation in Iran seems to have obscured the tourism vision and potential. Following the political changes in 1979, there was an abrupt drop in the level of tourism activity as tourists, particularly those from outside the region, that chose to go elsewhere. In spite of the fact that Iran ranked in the top ten countries with respect to its ancient and historical sites (UNESCO), experts believe that its pilgrimage sites, costal areas, mountains, deserts and rivers have remained untapped because the state has either ignored or given too little attention to the tourism industry.

To give some idea of Iran's past performance with respect to tourism, Sahraeian, a senior economist (2005), argued that ' Iran was the Middle East's top tourist site during 1967-1977, when Egypt, which has one of the world's Seven Wonders, was (only) ranked 14th in the region'. In 1977 the country attracted more than 70,000 USA visitors, compared with only 800 in 1995 (Alavi and Yasin, 2000, p.13). Over the past 25 years, concurrent with the organized expansion of tourism in countries such as Turkey, Egypt, Jordan, Morocco, Tunisia and some Persian Gulf Arab states, Iran has only received 5% of the $80 billion Islamic tourism market (Iran Daily, 2004). However, the arrivals show more than a million arrivals which is also behind the arrival numbers of countries such as Syria and Jordan. It can also be argued that most of these visits are either VFR or business travel but this is hard to substantiate from the figures available (See Table 5-2 and Graph 5-5).



Source: adapted from UNWTO-e library 2006

Table 5-2 International tourism receipts US$ (million) 2002-2004

	2002	2003	2004	Change average annual growth	
				03/02	04/03
Middle east	17,017	17,869	22,079	7.5	24.8
Iran	1,357	1,033	1,074	-23.9	4.0

Source: adapted from UNWTO (2006)

Since the revolution there have been a number of political events that have detracted from the image of the country as a tourist destination. To add to these problems there has also been a lack of efficient planning and management for the future of tourism. Tourism has not yet been considered as a major economic priority, even though there have been signs of development potential (UN ESCAP, New York, 2001). Many officials in the country have argued that tourism in Iran is a key to development (Iran's Tourism Master Plan, 2002 Maldives 11th-13th February 2002) but others have argued that the plan cannot be effective. AbuTaleb, who is a member of the Cultural Commission in the Iranian parliament, called for the adoption of a National Policy on

tourism, noting that foreign models should be avoided, and criticized the "luxuries approach" used elsewhere to attract high spending tourists (Iran Daily, August 15, 2005).

According to Ghadery (2005), the prospect of the tourism master plan seems bleak since the plan that was devised has not been implemented and no tourist specialists have been given access to the plan, only a computer expert and an English translator. Ghadery (2005), furthermore, points to the lack of professional and experienced human resources in the tourism industry, resulting in less than 10 tourism specialists in the country and few well–trained members of the labour force in the industry. Ghadery (2006 in Iran Daily) added:

"Until when should the government spend on the tourism sector and be satisfied with the low number of tourists coming in from regional countries, adding that the industry will not improve as long as its status in the national economy remains unclear".

According to statistics that were released by the Oil Ministry, it requires $70 billion worth of investment in order to export five million barrels of oil per annum. Rahimipour, an official within the Iran Cultural Heritage and Tourism Organization, noted that injecting this $70 billion into the tourism sector could revolutionize the whole industry, and added that just 1% of the funds allocated to other industries flows into tourism (Iran Daily, 25 may 2005).

There are many factors that can affect the level and growth of tourism demand for a destination. The main focus of this study is to look at the factors that influence potential travellers' travel risk perceptions. The following section examines briefly the main events that have taken place in Iran since the 1979 revolution and are likely to have influenced those travel-related risk perceptions.

5.2.2 Iran and terrorism

The problems with respect to tourism development in Iran are neither new nor simply related to the government's nuclear programme. Both before the Shah and after, Iran's strategic positioning (neighbouring Russia, its coastline along the full length of the Persian Gulf) gave it unrivalled power with respect to shipping in the Gulf. Its potential role in the Persian Gulf and the Middle East has made the country an ongoing preoccupation of the United States (Kanter,2003 in Hiro 2005). Hiro (2005)

argues that even if the Iranian revolutionaries had stopped, once they had overthrown the Shah, Washington would still have found it difficult to live with Tehran. However, the revolutionaries went much further than this. The campaign of expelling USA influence from their society and calling for Islamic self-reliance and self-sufficiency in the region did not create a formula for stable relationships. The USA being the major force in the region, saw these policies as a direct provocation. This started a conflict between the world's largest superpower and an oil-rich rising regional power that has persevered for more than a quarter century. Even though, 25 years later, the ideology of Islamic revolution is crumbling and turning secular, (Tellier 2006) the conflict remains.

The United States has kept in place various sanctions (there were 19 of them until 2006) against Iran since the revolution, following the seizure of the U.S embassy in Tehran on 4th November. As a consequence of this seizure, Iran held the US diplomats for 444 days. Enders and Sandler (2000) noted that the takeover of the U.S embassy in Tehran marked a change in the nature of terrorism with increased severity of attacks from that time onwards. Norris et al .(2003) and Aburish (1997) link the stereotyping of Muslims and Arabs as the instigators of terrorism and violence to the taking of the US hostages and the lengthy process involved in securing their release (1979-81). Said (1981 in Norris et al.(2003)) noted further that the failure of US media and officials to understand and explain the Arab and Muslim world created a bigger gap between the West and the Iran. In particular, Said argued that "Muslims and Arabs are essentially covered, discussed, apprehended either as suppliers of oil or as potential terrorists".

However, some argue (Hiro, 1985, Simpson 2006 in BBC) that the American sanctions, as extensive as they were, have been ineffective. One of the main problems with economic sanctions is that they often have undesirable effects on the poorer segments of the population in the countries which are subjected to them. Some countries were able to take advantage of the difficulties that Iran faced and profit from them, such as the Emirates (Hiro, 1985) and Turkey (BBC, 21.09.05). According to Simpson (2006), sanctions rarely hurt a country's leaders, instead hurting the poor and unprotected. Sometimes they even help the economy, since more things have to be manufactured at home, increasing economic linkages. However, it may be that

Simpson missed the bigger picture in Iran, seen by the fact that even though the manufacturing industry started to improve, the high levels of corruption (table 7-3) meant that lucrative businesses are at the government's disposal. Some argue that a handful of religious extremists are holding the entire population of Iran in thrall, even though others, such as Simpson (2006 in BBC), believes that there is some kind of democracy, although within narrow limits.

As a result of the USA sanctions the Iranian Rial dramatically fell in value from where 1 US$ = 70 Iranian Rial (IR), to around 1 US$ = 10,000 IR. Iran found it difficult to obtain spare parts for its ageing fleet of Boeing aircraft purchased before the 1979 Islamic revolution (BBC, 12, 02.02) and all of the internationally branded hotels in Iran such as the Hilton and the Hyatt were closed.

5.2.3 The sanctions

The deep hostility between the USA and Iran is typified by the fact that in 1984 Washington added Iran to its list of 'terrorist nations'. This meant that Iran was now subject to rigid US export controls. Furthermore, Iran has been accused of being a sponsor of Islamist groups, including the Lebanese Shiite militants of Hezbollah (which Iran helped found in the 1980s) and such Palestinian terrorist groups as Hamas and Palestinian Islamic Jihad. It has been considered by the State Department to be the most active state sponsor of terrorism in providing funding, a safe haven, training, and weapons for Lebanon-based Hezbollah and Palestinian terrorist groups Hamas, Islamic Jihad, the Al-Aqsa Martyrs Brigades, and the Popular Front for the Liberation of Palestine-General Command since 1998. In 2005, the U.S president G.W Bush (2000-2004 and 2004 to 2008) said (03.02.05 CNN):

"Iran remains the world's primary state sponsor of terror -- pursuing nuclear weapons while depriving its people of the freedom they seek and deserve".

This does little to market Iran as a "must go to" tourism destination! It increases people's awareness of the political conflicts and increases their perceptions of travel-related risk to Iran and to the region.

Iran's image was further damaged by the British Prime Minister of the time, Tony Blair, stating that there is "no doubt" that Iran is a state sponsor of terrorism, and he urged the Islamic Republic not to obstruct the path to peace in the Middle East (CNN,

Feb. 08. 2005). Iran is a very vocal supporter of Hamas, (the military group that has been branded a terrorist organisation by Israel, the US and the EU) which won the first Palestinian parliamentary elections for 10 years in 2006. However, the clerical regime denies allegations that it finances these groups (Aljezeera, 26.01.06, BBC, 26.01.06). Finally, the issue of travel warnings against Iran has been on and off since the revolution in 1979, not only by the U.S Department of State but also by many Western countries such as the UK and Canada.

5.2.4 Conflict in the region

The Iran–Iraq war, or the Imposed War in Iran, was a war between the armed forces of Iran and Iraq lasting from September 1980 to August 1988 along a front of some 400 miles. In most discussions of the Iran-Iraq War, it has become commonplace to view the conflict as the latest manifestation of the millenarian Arab-Persian struggle for domination of the Gulf and the Fertile Crescent. Some historians have traced its origins to the pre-Islamic rivalry between the Achaemenid and the Babylonian empires, others to the 7th-century Arab-Muslim destruction of the Sassanid Empire and the subsequent conversion of most Persian to Islam. Still others viewed the war as the extension of the historic struggle for power and control between Sunni and Shi'ite Islam (Karsh, 2002). Marsh and Dobson (2001), however, draw a bigger picture in terms of the involvement of the US in the Middle East post Cold-War. Its concern was mainly related to the oil supplies. The USA's approach to securing geo-strategic stability has been the dual containment of Iran and Iraq that helped the US to promote Saudi Arabia and the more vulnerable states of the Persian Gulf to draw closer to the US. Furthermore, fear of Iran's Shiite revolution caused Americans to favour Iraq in the war against Iran.

The conflict was rooted in regional rivalry whereby Iraq was supported by many Arab states such as Saudi Arabia, Kuwait and Egypt, (Karsh, 2002) and where Syria and Libya supported Iran. Iraq believed that Iran was in turmoil and that their forces could achieve a quick victory. It was a monumental mistake (BBC, 22.09.05). After the Kuwait invasion by Iraq in 1991, Arab countries (despite supporting Iraq for the 8 years war both directly and indirectly) joined the US led coalition perhaps because they felt it prudent to back the winning side. The war which started with the bombing of several Iranian air and military supply bases, including Tehran's

international airport (the most important international airport that is both for military and civil use), was disastrous for both countries, stalling economic development and disrupting oil exports and spending much of both countries' budgets to buy arms . It has been called "the longest conventional warfare of the 20th century" with more than 1 million casualties and the cost of around US$ 1.19 Trillion. (BBC, 22, 09.05, and Hiro,1991). The war clearly did nothing to help Iran's tourism industry and only enhanced the travel-risk perceptions of the country.

5.2.5 Human rights

One of the main objectives of the Islamist Regime after the political change in 1979 was to purify society, which it felt had been corrupted by alien influences over the previous centuries, and to Islamize it. "Corrupt behavior and customs" had to be ended. Alcohol and gambling were banned and so were night clubs, pornographic films and mixed bathing, society needed to be Islamized in a positive sense. Therefore, Friday noon prayer and sermons became the focal point of the week. The sermons were used to inform and educate the faithful. Furthermore, those who resisted the Islamic government were to be punished along the lines set out in the Sharia. Such Islamic crimes as raising arms against the Islamic state or spreading corruption in society were to be subject to capital punishment. This was the ideological framework, which Khomeini laid out, and within which he operated during this phase of the revolution, and many years after the revolution (Hiro, 1985).

Afshari (2000) investigated how Islamic culture and Iranian politics since the fall of the Shah affected human rights policy in that state. Afshari (2000) suggested that Iran has committed human rights violations since the revolution, and that the country has behaved in a manner similar to other authoritarian governments with respect to its human rights abuses. Infringements of human rights, real or implied, do little to bolster people's travel-risk perceptions of a country and this has clearly been an issue for tourism development in Iran. Although some authors, such as Afshari (2000), have argued that human rights violations in Iran have been motivated more by political and economic factors rather than striving to maintain or restore some sense of cultural authenticity, from the tourists' perspective this is irrelevant as the immediate perceived danger to their person is the most important aspect.

According to the US State Department (1997), the Iranian government's human rights record has remained poor, although there have been efforts within society to make the Government accountable. Intense political struggles continue between a broad popular movement that favours greater liberalization of government policies, particularly in the area of human rights, and some hard-line elements in the government and society, which view such reforms as a threat to the survival of the Islamic republic. In many cases, this struggle is played out within the Government itself, with reformists and hardliners facing each other in divisive internal debates.

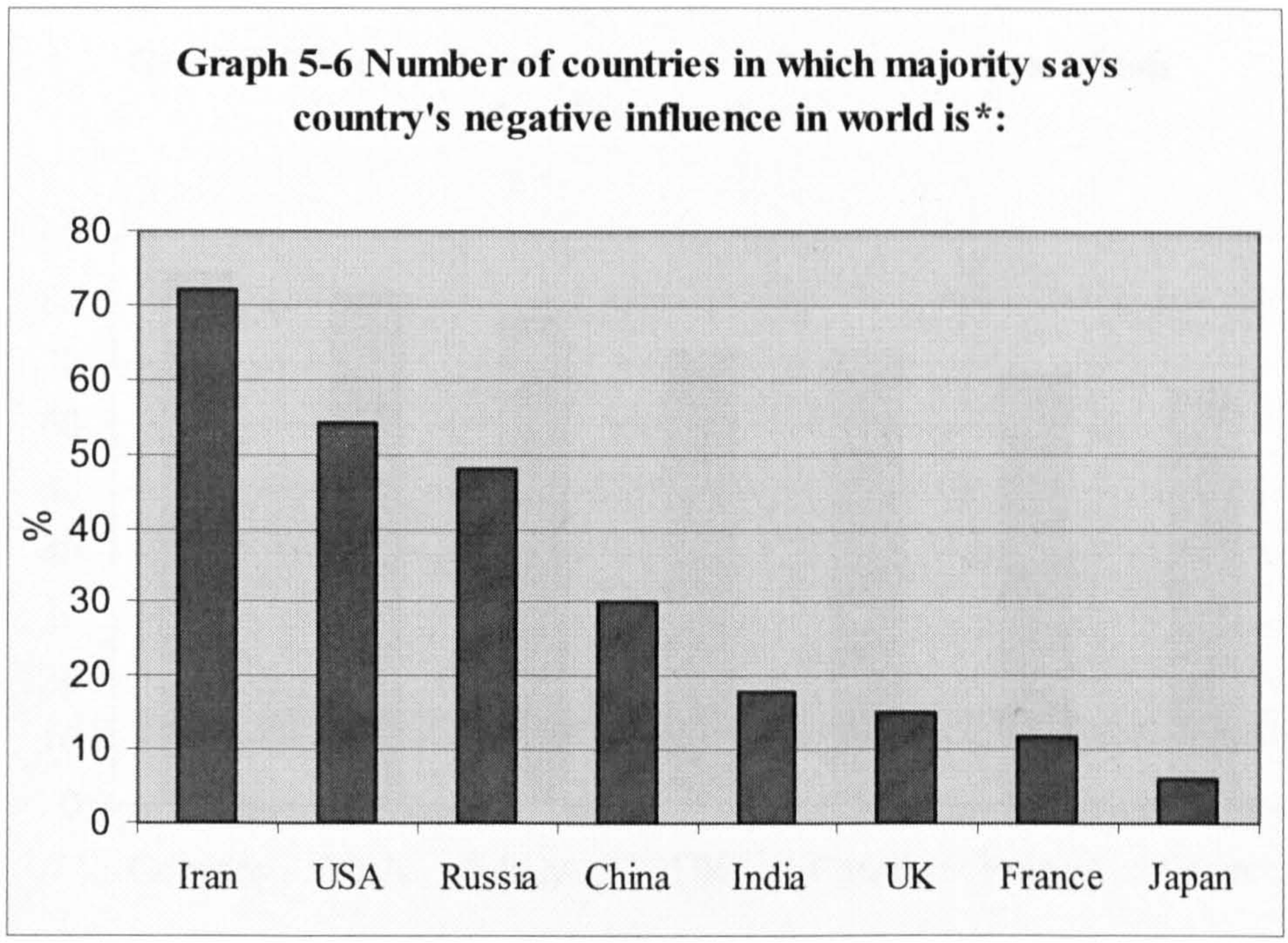
Human rights laws attempt to address the kind of repression, abuse, deprivation, and discrimination from which many people are suffering in a wide range of countries including those deemed to be Muslim. Certain segments of the population such as women, and children are particularly vulnerable under such regimes. Even countries that have moved farthest in the direction of accommodating human rights for women, such as Turkey and Tunisia, still have problematic human rights records. Turkey, although to a large extent democratic, has a poor human rights record in many respects. Among other things, the Kurdish minority is harshly repressed, and supporters of the Islamist movement find themselves targets of prosecution. Similarly, Tunisia has been branded a repressive police state, where torture and imprisonment of opponents or critics of the regime are common. Islamist groups are especially targeted nevertheless; in neither country can Islamic law be blamed for the human rights violations, but human right abuse are happening in Muslim countries (Mayer, 1998).

The sex slave industry is purported to be rife in Iran (Hughes,) with more than 80,000 prostitutes working either in the streets or in the 250 brothels reputed to be in Tehran. Although the sex industry can be seen by some countries as a positive aspect for tourism development (tourism development in places like Thailand, Indonesia and a number of East and Central European countries owe a significant amount to the popularity of sex tourism) the cultural divide between Iran and the West does not make this a viable, even if undesirable option. Besides, prostitution in Iran is illegal and many of the prostitutes are sent to Dubai to ply their trade.

If one adds to the human right violation issues the tension between the USA and Iran over its nuclear programme, there are significant grounds for suggesting that the political situation is detrimental to tourism development. The natural and man-made

tourism assets that are so abundant in Iran are redundant if potential tourists are concerned for their own safety or see the culture in Iran as alien, whether this is true or not. The greater the conflict between Iran and the USA, the more these issues are reported and misreported in the media and the more aware potential travellers are of the issues in Iran.

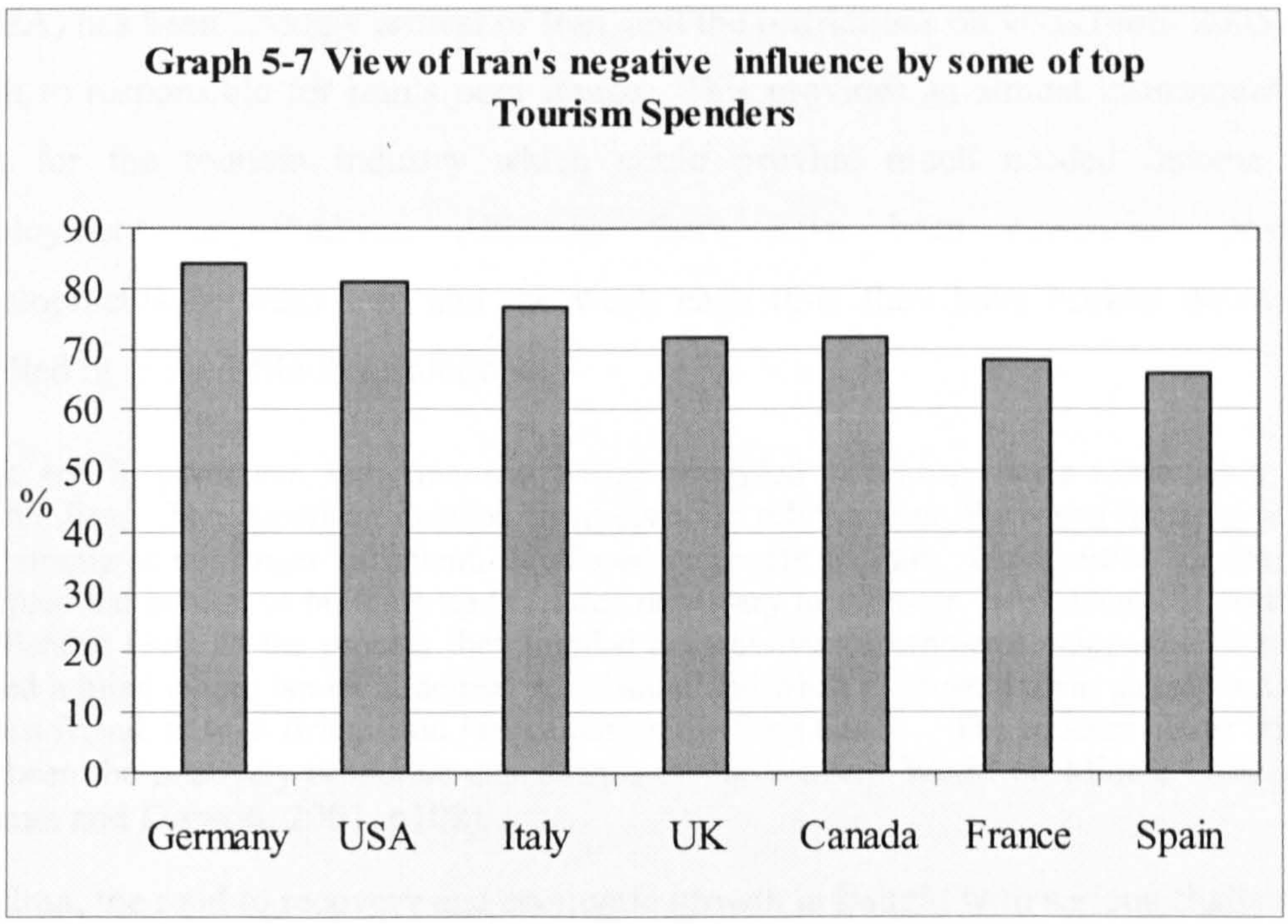
According to a poll by the Pew Research Centre (1-5 February, 2006), Americans believe that Iran poses the greatest danger to the USA, more so than countries like China, North Korea and Iraq. Moreover, around 82% of US citizens believe that if Iran developed nuclear weapons, it might provide them to terrorist organisations. However, Norris et al. (2003) have argued that American perceptions changed drastically after 9/11 and that their perceptions of the threat of world terrorism is far greater than the actual reality. Systematic evidence provided by the US State Department indicates that the actual dangers from international terrorism have fallen substantially around the world, and indeed have fallen during the last decade. Yet post 9/11, American fears of the risk of terrorism have sharply risen, and the severity of the potential perceived attacks are far greater than before (Enders and Sanders, 2003).



Source: Adapted from Global Scan, PIPA, University of Maryland in BBC (03.02.06)

* number of States where most people responded by saying a country's influence in the world is mainly positive or negative. Based on 39,435 people in 33 states, Fieldwork: October 2005-January 2006

It is not surprising that Iran's image is viewed negatively by many countries around the world (see graph 5-6 and 5-7). Furthermore, 24 of the 33 countries polled felt that Iran is a negative influence in the world. In five other countries a relative majority felt that Iran is a positive influence, but in three of these the proportion who say this is less than a third. Furthermore, countries in Europe and North America have the largest majorities expressing a negative view of Iran. It is worth drawing attention to the fact that the latter are the world top tourists spenders (UNWTO, 2006), while the Europeans are the second most important source of tourists (7,163,000) to the Middle East after the Middle Eastern tourists (13,188,000).



Source: adapted from: http://www.worldpublicopinion.org

Snow (channel 4 news, UK, 2006) expresses:

'Iranians feel threatened by Pakistan's and Israel's nuclear bomb and by Afghanistan. They are surrounded by trouble - war in Iraq, unstable regime in Saudi Arabia, Israel, Pakistan. It is quite a beleaguered feeling and, remember, they are Persians, not Arabs'.

Conclusion

In the context of political impediments to the development of tourism, the purpose of this chapter was to examine the political problems and tourism in the Middle East in general, and Iran in particular. The main problems the Middle East faces, and in particular Iran, is that, as a destination, it has had an abundance of negative political events that create an image of being a risky destination to travellers, in particular for visitors from western countries. According to figures released by Aziz (2001 in Harrison 2001 and the WTTC 2005 and UNWT0 2006) tourist traffic to the Middle East has grown strongly in spite of the War in Iraq and the on-going political tensions in the region .

It seems that the disincentives resulting from the war, the anti-Western stance of the revolutionary regime in particular against the USA, concerns over human rights, the nuclear programme, in respect of which the International Atomic Energy Agency

(IAEA) has been strongly critical of Iran, and the restrictions on visas (until 2005), all seem to responsible for Iran's poor image. This provides an almost insurmountable task for the tourism industry which could provide much needed income and employment opportunities. Although there have been occasional positive developments between Iran and the west, each time they have broken down and resulted in more difficult resolutions.

West and in particular, the American policy struggled to manage their relationship with Middle East. The American deluded themselves by relying upon European imperial power that simply is no longer sufficient, developed surrogate to fight their battles for the, and accepted the burden of building-up the force necessary to arbitrate the balance of power in the Persian Gulf. In the process they toppled progressive governments, supported dictators, turned a blind eye to Israeli atrocities in Lebanon and when it situated them abandoned their closest friend, as with Britain and France during the Suez Crisis... The concern above all else has been the relatively economic dependence of the Western World on Middle Eastern oil (Marsh and Dobson, 2001, p102).

For Iran, the road to recovery and economic growth is fraught with serious challenges. However, the experience of several countries in the Middle East and the rest of the world has shown that a mutual positive relationship with the generating markets (West) leverages the ability of developing countries to compete in the world market. Unfortunately, Iran's strategic situation in the Middle East and its rich tourism resources have never been put to use for the economic development of the country or to the benefit of the people. For instance, in Iran tourist can ski in the morning, visit heritage sites at lunchtime and swim in the afternoon.

Chapter 6

Risk perception

Introduction

The previous chapters highlight the extraordinary events that have disrupted travel flows in recent times. Perceived or actual travel-related risk when travelling to a region where one's basic need for personal security is compromised affects the tourism system. Thoughts about insecurity in the mind of a potential tourist change their perceptions of any given destination (Douglas and Mills, 2006). Simply because tourism involves moving out of one's norm or comfort zone, tourism takes place within the bounds of the concept of security, and the travel decision, the level of risk-averseness and the image of the destination are all significantly influenced by the tourist's perceptions of risk and safety (Hall, Timothy, & Duval, 2003). Authors such as Ryan (1991) have argued that tourists generally avoid politically unstable destinations because of the potential that aggression and terrorism will be directed at them. The simultaneity of production and consumption associated with tourism means that the tourism product cannot be exported in the same way that many other goods and services are exported and so tourists tend to be sensitive about political unrest or security risks (Mansfeld and Winckler, 2004). The risks that tourists perceive need not even be in the actual country to which they are thinking of travelling because security issues in one part of a region may result in the risk perceptions of the whole region being altered (Mansfeld, 1999). Safety and physical security are the primary conditions for the normal tourism development of a destination, region, or country.

In order to understand the issues relating to travel risk and travel-risk perceptions it is worth spending some time looking at the concepts of travel risk and travel-risk perceptions. The purpose of this chapter is to explore the current literature in the area of risk perceptions in the context of tourism and to examine the factors that contribute to and influence perceptions of travel related risk.

Risk is a complex issue and does not only relate to risk of personal physical harm. Thus, although some authors (such as Poon and Adams, 2000; Resiniger and Mavondo, 2005) argue that safety and security are extremely important issues for tourists, others (such as Rohel and Fesenmeier, 1992) identified seven distinct risks that might influence the purchasing of travel products. These different types of risks

relate to equipment, financial, physical, psychological, satisfaction, social and time. In tourism they identified three dimensions of the perceived: physical – equipment risk, vacation risk and destination risk. Subsequently, others have been more specific in terms of the risks identified when travelling to a different country or region including: war, terrorism, and political instability (Clements& Georgiou, 1998;Sonmez&Graefe, 1998; Ioannides and Aposopolos, 1999). More importantly, from studying risk and travel, the authors found differences in the perception of risk among tourists (Douglas and Mills, 2006) where some travellers seemed to be more risk averse than others.

6.1 What is risk?

Before reviewing how risk applies to tourists when they are making their travel decisions, it is useful to examine the nature of the concept of risk in general. Risk is a perception of the future, a perception of how threatening a scenario might be. A brief search on the internet reveals at least 33 different definitions of risk (if one discounts the irrelevant tracks made by a heavy metal band and a board game of that name). Although most definitions harbour the same concept there are different aspects of risk worthy of note. Princeton University provides a sensible set of definitions for risk:

- hazard: a source of danger; a possibility of incurring loss or misfortune; "drinking alcohol is a health hazard"
- a venture undertaken without regard to possible loss or injury; "he saw the rewards but not the risks of crime"; "there was a danger he would do the wrong thing"
- exposure to a chance of loss or damage; "We risked losing a lot of money in this venture"; "Why risk your life?"; "She laid her job on the line when she told the boss that he was wrong"
- the probability of becoming infected given that exposure to an infectious agent has occurred
- gamble: take a risk in the hope of a favourable outcome; "When you buy these stocks you are gambling"

Source: wordnet.princeton.edu/perl/webwn

Risk perception is also an example of cognition or awareness, and there may be significant similarities or differences between different individuals (Wahlberg and Sjoberg, 2000). A risk scenario may not exist yet and may therefore simply be a mental picture of the future, constructed over a mental representation of the here and now, it is a relative concept. One of the central features of any definition of risk is the

distinction between what is real, and what is possible (Markowitz, 1991, Evens and Nowotny, 1987 referred by Renn, 1992).

Furthermore, risk has been defined as the possibility of physical, social, or financial loss because of a specific perceived hazard (Macquarie, 1999; Priest,1990 in Reisinger and Mavondo 2005). Rohrmann (1998) argues that this is a dominating negative view of risk. It is also possible to have neutral risk i.e., risk is about uncertainty of outcomes (good and/or bad ones) of a decision where the element of risk does not influence the decision; and even positive aspects to risk perception i.e., risk can mean: thrill (danger, induce feeling of excitement). There are clearly multiple concepts of risk. The most common uses are (Solvic, 2002):

- Risk as a hazard;
- Risk as a probability;
- Risk as consequence;
- Risk as a potential adversity or threats.

Glaesser (2003) noted that in the majority of uses of the term risk, two fundamental points are distinguishable. Using a risk perception model, it was attempted to describe, free of any value judgment, series of events based on rationality axioms. According to this approach, found mostly in insurance mathematics, risk is defined as "expected damage". It is a product of damage together with the probability of its occurrence. Much social science analysis rejects this notion, arguing instead that risk is inherently subjective (Funtowics and Ravetz, 1992; Krimsky and Golding, 1992; Otay, 1992; Pidgeon, Hood, Jones, Turner and Gibson, 1992; Solvic, 1992; Wynne, 1992 in Solvic 2002). In this view, risk does not exist 'out there', independent of people's minds and culture, waiting to be measured. Instead, human beings have invented the concept of risk to help them understand and cope with dangers and uncertainty of life. Although these dangers are real, there is no such a thing as a 'real risk' or 'objective risk' (Solvic 2002).

6.2 Risk perception and tourists

Generally speaking, the perception of risk is a vision based on the likelihood of negative consequences resulting from the tourists' decisions/behaviour (Moven and Minor 1998 and Glaesser, 2003). The perception of risk tends not to be absolute and is, as such, a personal judgement (opinion or belief) with respect to the probability of something occurring and the size of the consequences if it did (Rohrmann,2004).

With respect to tourism, risk can be defined as what is perceived and experienced by tourists, during the process of purchasing and consuming tourism-related services and whilst being at the destination (Tsuar, Tzeng, and Wang 1997 in Reisinger and Mavondo, 2005) and is one of the major factors that can influence the decision-making process with regard to the purchase of the tourist product. Tourism is a part of the service sector whose unique characteristics (intangibility, inseparability, variability and perishability) intensifies the perceived risk when compared to goods (Gronroos, 1990; Mitchell and Greatorex, 1993;Lovelock, 1996; Zeithaml&Bitner, 1996). In addition to the above factors, the tourism product gives rise to other elements, such as poor weather, unfriendly communities, disruptions to travel through industrial actions, inedibility of local food, acts of terrorism, crime, political unrest, disease, and natural disasters. These factors can all influence the level of perceived risk experienced by tourists (Mansfeld 1992; Roehl and Fesenmaier, 1992; Pizam and Mansfeld 1996; Mountinho1995; Tsaur,Tzeng and Wang 1997;Witt ;Sonmez, 1998; Sonmez and Graefe 1998a).

Risk during the tourism decision and consumption process is the deviation that can exist between the expected and the final, subjectively experienced tourism product. If the level of perceived risk is greater than some personal threshold limit, the tourist may try to reduce exposure to this risk by, say not travelling or travelling elsewhere so that the level of risk is reduced (Chandler 1991; Ehglander1991 ;Norton 1987). Normally, this threshold value is reached more quickly for a discretionary tourism product than, say, for a material product (Kreilkamp, 1998).

However, risk perceptions are often not based on reality (Sulvic, 1987, 1998 and Taylor, 2006). Furthermore, it is often not reality but rather the perceptions that

determine the behaviour of tourists when making their travel decisions (Weinstein, 1988 and Sjoberg, 2000, both referred to by Brug et al.(2004). Thus, it does not matter how incorrect or wrong a perception of risk may be, it will still influence the behaviour of the potential tourist in exactly the same way that decisions would be affected by changes in the level of risk from actual events (Moreina 2004) . Therefore the perception of risk has a direct impact and can, in effect, generate much greater losses than those that may be caused by the original harmful event Kaperson et al.(1998); Solvic(1992); Weber(2002); Sonmez and Graefe (1998a , 1998b) also found that perceived risk has a stronger influence with respect to avoiding a particular region than it has to the decision of planning to visit one. For example, those perceiving terrorism as a risk may be more likely to avoid travelling to the Middle East.

However, different types of tourists perceive differently in terms of risk and safety, and there are different factors that influence this perception (Lepp and Gibson, 2003). Roehl and Fesenmaier (1992) came up with a typology of tourists that allocated them into three types, based on their perceptions of risk:

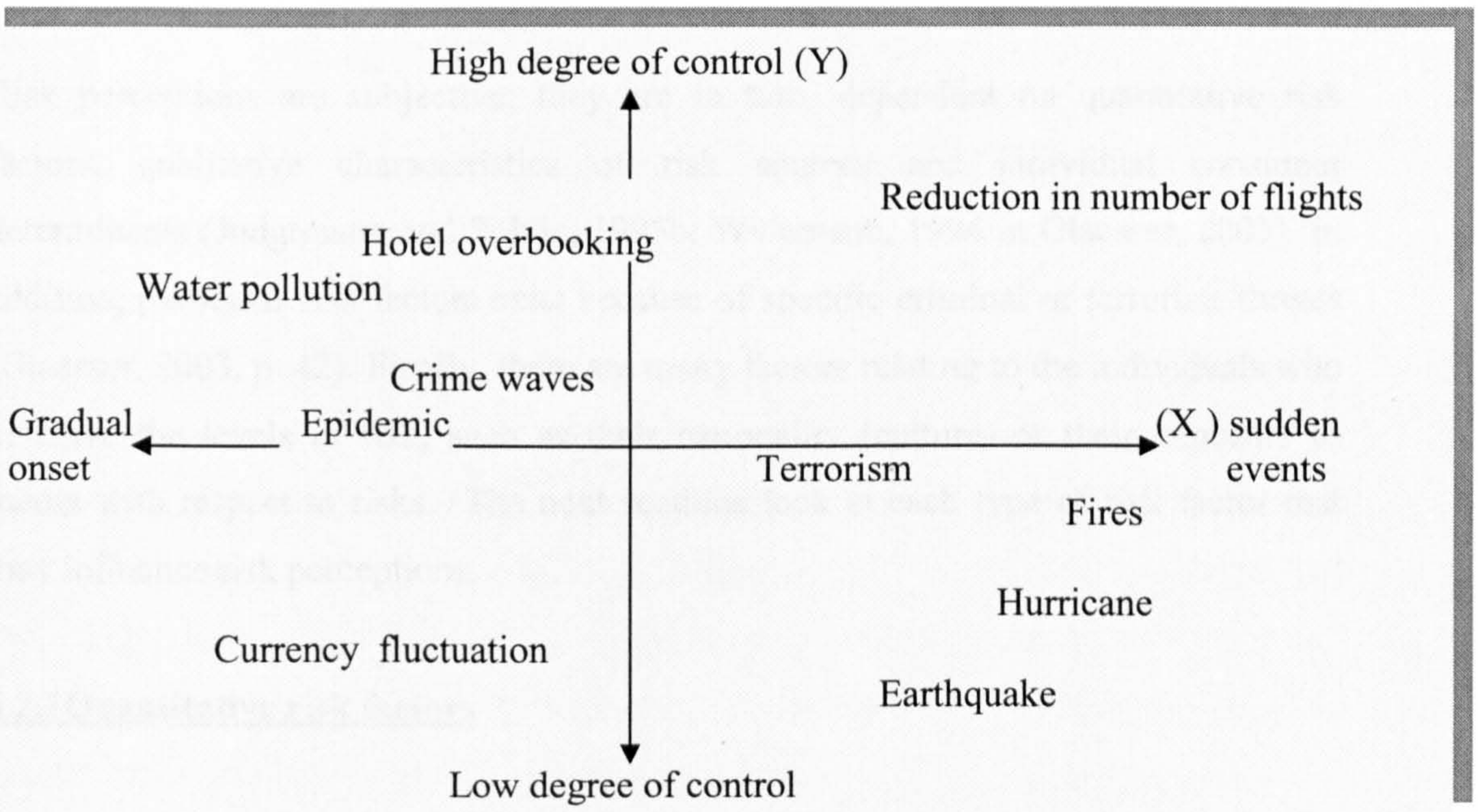
1) risk neutral
2) functional risk, and
3) place risk.

The **risk neutral** group may not consider tourism to their selected destination to involve risk, or perhaps not expose them to any risk greater than that experienced during their normal day-to-day life.. The **functional risk** group felt that the possibility of mechanical failure, equipment failure, or organizational problems was the major source of travel-related risk. The **place risk** group perceive vacations as being fairly risky and the destination of their most recent vacations as very risky. Although no attempt was made to link these categories with Cohen's tourist role typology, an interesting similarity is evident. The risk neutral group emphasized more the need to experience excitement and adventure when on a vacation than the other two groups.

In the same vein as that of Plog, set out in Chapter 2, Cohen (1972) identified four types of international tourists, based on their preference for either familiarity or novelty of the destination: the organized mass tourist, the individual mass tourist, the explorer, and the drifter. There is also the fact that while uncertainty or risk may be seen as being negative to some tourists it may equally be seen to be part of the excitement of tourism. Pearce (1996) hypothesized that the level of travel-risk averseness may be related to the experience of the traveller. For him, the more experienced tourists may seek to satisfy higher order needs, while the less experienced tourists may be more pre-occupied with lower needs such as food and safety. Hence experience means less risk-averse and less experience means more risk-averse. However, the relationship may be counter to this if actual risk is close to perceived risk such that experienced travellers are more aware of the risks they face and the less experienced travellers are, perhaps, naïve in the assessment of risks. This is an aspect that is explored later in this research.

The significance of risk perception when making travel-related decisions takes on higher levels of influence when there has recently been a negative incident. Similarly, risks can be categorised into those that are able to be controlled and those that are not. Figure 6-1 presents such a categorisation (Glaesser, 2003).

Figure 6-1 Negative incidents



Source: Based on Gee and Gain (1986) in Glaesser 2003

Figure 6-1 gives a brief overview of potential negative events that could trigger tourism crises, subdivided according to how easy they are to control and their onset speed. Diagram 6-1 shows Earthquakes to have the lowest level of control (it is on the very bottom of axis -Y) followed by currency fluctuations. However, the difference between these two negative events is the onset speed, where earthquakes are rapid and unexpected and currency fluctuations may be more slow and predictable. The rapid nature of, say, earthquakes and hurricanes provide little time if any to prepare for the crises although it could be argued that living on a geological fault or within the hurricane belt means that there is a higher probability of such disasters. Looking at the upper part of diagram 6-1 (+Y and -, + X), water pollution, for example, may have a gradual onset but be associated with less control than, say, a reduction in the number of flights.

However, the approach used in Diagram 6-1 is open to criticism. For instance, does one get more warning and have greater control over terrorist attacks than over, say, fires? Is it possible to have more control over hurricanes than it is to have control over earthquakes? These aspects are not as static and clear-cut as presented in the diagram. Terrorist attacks might be anticipated but when they happen they are generally a shock and as sudden as an earthquake.

Risk perceptions are subjective; they are in turn, dependent on quantitative risk factors, qualitative characteristics of risk sources and individual consumer determinants (Judgrmann and Solvic, 1993b; Widemann, 1994 in Glaesser, 2003). In addition, particular risk factors exist because of specific criminal or terrorists threats (Glaesser, 2003, p .42). Finally, there are many factors relating to the individuals who perceive the levels of risk, such as their nationality (culture) or their exposure to media with respect to risks. The next sections look at each type of risk factor that may influence risk perceptions.

6.2.1Quantitative risk factors

Glaesser (2003) suggests that there are at least two quantitative factors influencing the levels of perceived risk, one being the probability of an incident and the second being

the likely magnitude of damage resulting. Both components may be subject to distorted risk perceptions for a variety of reasons. The use of mental heuristics by tourists can result in misrepresentation of damage probabilities, and this in itself can be brought about by the likelihood of the incident occurring and the nature of the incident (Tversky and Kahnemann, 1974; Jungermann and Solvic, 1993a in Glaesser, 2003).

According to availability heuristics, the perceived likelihood of an incident re-occurring increases in the tourist's mind the more easily it is remembered or can be imagined. An obvious example of this is when there has recently been an air crash, tourists will focus on the crash and not on the many successful flights that occur before and after such an incident (Perrow, 1992, p.370 in Glaesser, 2003). These heuristics are only natural and can be expected, but another layer of influence which can magnify the results of such incidents is the way in which the media portray events (discussed in Chapter 2).

6.2.2Qualitative characteristics of risk sources

In addition to the quantitative factors that influence perceptions of risk there are qualitative factors that play a role. For instance, the nature of the risk, in terms of whether it is voluntarily taken or imposed on the traveller, is considered to be less important if the former and more influential if the latter. This probably reflects the level of control that the individual feels they have (Jungermann and Solvic, 1993a; Avenarius, 1995 in Glaesser, 2003). It also reflects the fact that some travellers are happier to take risks than others, as was evident immediately after 9/11 with some tourists visiting New York, or say, surfers going to the beach in Australia when there has been a recent shark attack. The purpose of the visit is also likely to have an influence in that business travellers may have less control over their travel decision than leisure or discretionary travellers. Luhmann (1991) distinguishes between risk and danger, suggesting that it is risk if decision is the basis of the exposure, and danger, if the responsibility is attributed to the environment, that is, one is exposed to the event (see Table 6-1).

Table 6-1 Natural hazards to tourism in tropical costal areas

Atmospheric	Earth	Biological
Tropical cyclones	Landslides	Human epidemic
Tornado	Earthquake	Plant epidemic
Storm surges	tsunami	Animal epidemic
Floods	volcanoes	Plagues
Frosts	Erosion	Bush fire
Droughts	Grand failure	
Severe storms		

Source: adapted from Granger (2000 p.25)

Considerable importance is attached to this division when assessing negative events. In general, man-made negative events tend to be perceived as having higher levels of risk than natural events. According to Jungermann and Slovic 19931, p100:

> "Whilst natural risks are classed as involuntary , unaccountable , not attributable to society and therefore, as more or less unavoidable- and obviously not as bad - civilian risks are seen as voluntary, controllable, attributable and avoidable –and therefore, obviously worse".

If a traveller feels that events are under control (either their own control or "the authorities") they tend to be associated with less perceived risk than those that are not under control (Jungermann and Solvic, 1993a). However, there are also differences between events that can be controlled by the individual subject to the risk and those that are controlled by someone else. Hence there can be a higher perceived risk associated with travelling in a commercial aeroplane than in one's own car even though the latter is statistically more risky than the former.

Counter to this, there is the distinction that can be made between intentional and accidental events. We tend, as a species, to over-react to intentional events and so have higher levels of perceived risk about them than we do about accidental events. Timing is also important, with high levels of risk perceptions about imminent threats (higher than warranted) and low levels of perceived risks (lower than warranted) about long-term, non-imminent threats.

Familiarity with events can be another influencing factor. If travellers are accustomed to particular events, then they build up some form of acceptability and perceive them as being less of a risk than new events that have not been experienced before. This can largely be explained by the fact that new events, because nobody has experienced them, have uncertain consequences and it is that uncertainty that leads to higher levels of perceived risks – better the devil you know. People learn about the outcomes of events and the probability of their reoccurrence in an experiential way, they tend to amplify their perception of risks associated with rare but spectacular events (Erev, 1998, Barron and Erev, 2002, Weber, Sharoni and Blairs, 2001). This is at least partly as a result of the fact that rare events often are not experienced in proportion to their theoretical likelihood. In those instances where a rare and extreme event is experienced, one expects decision-makers to overestimate its risk level. In some parts of the world terrorism may still seen as a rare event whereas in others it is commonplace. The IRA bombings in Northern Ireland and mainland UK at one stage became almost commonplace and therefore lost some of their impact with both the media and the people. Does constant exposure to acts such as terrorism reduce the threat over time or does it get worse? A genuine question as UNWTO Secretary General Frangialli (2005) suggested:

"There has been a shift in the security paradigm with regard to everyday life and travel, as people have come to accept higher levels of uncertainty than in past years".

6.2.3 Individual risk factors

In addition to the quantitative and qualitative factors that influence the perception of risk of travellers, there are a significant number of personal factors that may result in different people holding different levels of risk perceptions with respect to the same events. According to O'Banion (1980 in Lawrence and Schmidlin, 2002), individual risk perceptions can be categorised as follows:

- Individuals as a rule tolerate much greater risk in activities over which the expert personal control is in the hands of some external body;

- Individuals tend to be more favourably disposed to consequences that are distributed overtime than to those where a lot of people get it at once (risk averse);
- The more terrible the event, the greater its intuited probability;
- Low probability events are overestimated; they seem more likely than they are in fact.

In other words, individuals may be expected to respond more negatively to risky events that (Lawrence and Schmidlin, 2002):

- Are under external control;
- Are low probability but catastrophic in nature;
- Have recent/or outstanding experience.

Individual risk factors may vary depending on demographic variables such as age, sex and education. Higher risk perceptions can be expected, perhaps, by female tourists in comparison to men and a lower risk perception may be found in young tourists aged 18-24 in comparison with older tourists (the investigation that forms the basis of this referred to the United States and the United Kingdom UNWTO,1994b). A study by Nicholson et al. 2004 showed that risk taking in any domain is influenced by a combination of general factors, including age, sex and several personality characteristics, notably sensation seeking and value openness. However, it may not be possible to generalise about risk taking in one domain to risk taking in other domains. The results showed that, in addition to the general factors that predicted risk taking in all domains, there is a range of domain specific variables that influence whether people chose to take or to avoid risk. In sum, risk behaviour is patterned. Some people are likely to be consistent risk takers; other will be consistently risk averse, while a third group may have domain-specific patterns of risk behaviour.

A further factor can be seen in terms of the cultural background of travellers, which contributes to people perceiving and assessing the risk of events in different ways. This can be traced back to various social, behavioural and development forms (Kemp, 1993 in Glaesser 2003 and; Sonmez and Graefe, 1998). This is witnessed by events

such as those of the mid-1980s in Europe, at which time the number of US arrivals decreased considerably because of the frequency of terrorist attacks whereas, at the same time, internal European arrivals increased (Hurley, 1988, Ryan, 1993). Beirmann (2003) reported a similarly high level of sensitivity towards negative events by the Japanese as consequence of the Luxor attack in 1997 in Egypt (explained in the case of Egypt in chapter 3). This particular risk aversion has even stronger consequences in comparison to other cultures since, after consequential absence from the destination, a healing process tends to occur only slowly (Gee and Gain, 1986).

6.2.4 Particular risk factors- criminal or terrorist threats

A security aspect as a subsection of negative events occupies a special place. Security is defined 'as the fear of becoming a possible victim of violent crime, such as flight safety, terrorist act' (UNWTO, 1994b; Smith 1998). Without doubt, criminal activities are a permanent part of daily life and in the context of tourism, they take on an even more important level of prominence. In a study by Kemmer (1995), the security of a destination was ranked as being second or third aspect in the order of importance when selecting a destination. Tolerance towards the risk of being subject to acts of terrorism is very short-lived and as soon as they cause serious injury or death the behaviour of tourists suddenly changes. Despite continuing to have an attractive image, a destination is then classed as being dangerous (Ahmad, 1996).

Terrorism is a relatively new form of specific risk (Sulvic in Press 2002) which occupies a special position within the sphere of negative events. Following recent events and the coverage given to them by the media, authors such as Resiniger and Mavondo (2005) suggest that the perception that an individual may become a victim of terrorism or international conflict is growing. The actual level of tourism risk from acts of terrorism is relatively small but can take on disproportional magnitude in terms of perceived risk levels, see for instance, Sandler and Enders (2003). As such, while 56 (7/7) deaths is clearly a relatively large loss in a single place at one point in time, it is considerably smaller than many other mortality risks. More people are killed every year in car accidents in the UK (Statistics for UK, 2005) than the total numbers of people who are killed by terrorist attacks (for the Madrid bombings 4/11, USA 9/11 and 7/7 July the total amounts to 3,431persons).

Sulvic (2002) argues that because the risks associated with terrorism are seen as being poorly understood, a catastrophic incident anywhere in the world may be seen as an omen of disaster everywhere, thus providing responses that carry immense psychological, socioeconomic and political impacts. The boundaries of imagination tend to limit the perceptions that people hold of risks experienced as a tourist. Before the 9/11 attacks, it is highly unlikely that terrorist attacks of this magnitude were even among the possibilities that ordinary citizens contemplated. Political terrorism is a product of modernity itself: but the events of 11 September have punched a huge hole in the optimism of the new millennium and of that modernity (Halliday, 2002). In this way, travel-risk perceptions are geared up and settle at higher levels until the next big event occurs or until such time as the memories of the last big event start to fade.

Viscusi and Zeckhauser (2003), however, consider that because no voluntary market transaction is involved with risks of terrorism and no form of compensatory benefits is available, this makes deaths from terrorism different to other type of deaths. Indeed, terrorism risks are highly imprecise and difficult to predict. Since there is little hard evidence to rely upon, people's assessments of terrorism risks are highly variable. Estimates of terrorism risks, the number of deaths expected in a year, clearly produces a situation of considerable risk ambiguity. However, this ambiguity is not randomly and symmetrically distributed around some mean risk value. Rather, there is a long tiny-tail probability of extremely catastrophic outcomes (Viscusi and Zeckhauser, 2003).

According to Norris et al. (2003), many researchers feel that terrorists spread public fear in order to create a powerful bargaining tool. Long (1990, p5) argues that terrorists often "use the unreasonable fear and the resulting political disaffiliation it has generated among the public to intimidate governments into making political concessions in line with its political goals". Indeed, Long (1990) claims that terrorism is essentially a psychological phenomenon, "with fear and publicity two of its most important elements" (1990).

In spite of the fact that terrorists may create public fear in order to influence their negotiations with targeted governments, fear has secondary consequences that further

undermine government authority. Researchers drawing on classic case studies suggest that fear fragments and isolates society into anxious groups of individuals concerned only with their personal survival (Allen, 1984; Long, 1990; Wardlaw 1982). As Hutchinson (1973 in Norris et al., 2003) points out, "terrorism destroys the solidarity, cooperation, and interdependence on which social functioning is based, and substitutes insecurity and distrust". The collapse of social trust and cooperation could have serious effects on how society functions.

A deeper understanding of psychological reactions to 9/11 plays a central role in analyzing the effect of terrorism and the success of counter-terrorist actions (see chapter 4). Studies have highlighted three key consequences of fear and anxiety. First, fear tends to raise travel-risk perception (Lerner and Keltner 2000, 2001; Mathews and Macleod 1986). This is consistent with the more general finding that events which arouse negative feelings lead to an overestimation of risk (Johnson and Tversky, 1983). Furthermore, anxiety and fear encourage a sharp sympathy to threat.

Secondly, fear leads to risk aversion. Research on threats that involve the potential for physical harm such as crime, natural disasters, and violent conflicts provide evidence that personal threat and fear leads to a change in personal behaviour designed to minimize risk. Reactions to other terrorist events highlight "the transformation of reasonable fear into a kind of irrational hysteria" (Long, 1990) and the deep unwillingness of Americans to fly after 9/11, or the precipitous decline in tourism in Bali after the 2002 club bombing.

Thirdly, fear can have a damaging result on the sensible processing of information because it leads to worsened cognitive performance (Lerner and Keltner, 2000, 2001; Mathews and Macleod, 1986). This fits in with research findings on the quality of elite and group decision–making under conditions of threat. Other evidence indicates that the group decision–making process deteriorates under conditions of threat perception and stress (Janis 1982; Hart 1990; Pruitt 1965). Furthermore, Norris et al. (2003) distinguished between fear and the cognitive perception of personal and national risk because they have different effects, even though they are related (Huddy et al.(2002)).

According to Resiniger and Mavondo (2005), the world in which we live is perceived to be riskier than the world before (Fischhoff, Nightingdale, and Ianotta, 2001). Capitanchik (2002) argues that nowhere in the world is really safe, terrorist attacks could happen anywhere. However, some places are safer than others because of how seriously the authorities take security issues. Terrorists may tend to strike where there is a lack of security as it increases their chances of success. Developing countries are increasingly becoming the most desirable tourist destinations however; this does not necessarily mean that authorities pay much attention to security (e.g. Bali). However, it could also be argued that increasing security could raise people risk averseness. Notwithstanding the influencing factors mentioned above, individual tourists will have personal thresholds of risk that they are not prepared to exceed (Kroeber-Riel, 1992). The level of this individual threshold value is determined in part by the credibility of the affected organization, and the speed of its actions and the repetition of the events.

The relatively huge publicity given to terrorist attacks, particularly in the West or when the target is Westerners, and the resulting losses generate the kind of risk that people are likely to severely misestimate in the future. These terrorist attacks also force people to completely rethink their risk beliefs. It could bring the idea into people's mind to substitute travel altogether and instead undertake different activities or simply go to different destinations The way in which it influences travellers' decisions is clearly a critical issue for those nations that are highly dependent on tourism revenue.

6.3 Risk and the impact of culture

People try to exist in a world which lacks certainty and they do so through the domains of technology, law and religion. Luhmann (1976, p.143) argues that "a basic fact of life is that time only goes one way. We are caught in the present which is just an infinitesimal borderline between past and future. Humans have to live with a future which cannot begin because it moves away if we try to approach it but which serves as a projection screen for our present hopes and fears." In other words, we are living with uncertainty and we are conscious of it.

According to Hofstede (1980, 1989), if uncertainty exceeds threshold limits it creates unbearable anxiety in the individual or for society. The technology that Hofstede (2001) refers to includes all human artefacts, law, all formal and informal rules that guide social behaviour, religion and revealed knowledge of the unknown. Technology has helped societies defend themselves against some uncertainties such as those caused by nature, laws have been devised and implemented in an attempt to protect ourselves from others' actions and, when all else fails, religion provides comfort and protection to believers for those uncertainties against which we cannot defend ourselves. The knowledge of a life after death is the ultimate certainty of the believer which allows him to face uncertainties in this life. The borderline between "defending against uncertainties" and "accepting them" is quite fluid and difficult to identify.

Different societies have adapted to uncertainty in different ways. The view of people in high uncertainty avoidance cultures can be summarised as "what is different is dangerous", and the view credo of people in low uncertainty avoidance cultures as, "what is different is curious" (Hofstede, 1991, p.119). A study by Dawar, Parker, & Price (1996) demonstrated the importance of uncertainty avoidance involved in information search behaviour. Finally, the results of a study by Money and Crotts (2003) were consistent with the expectations that there are differences in between the various cultures with respect to the degree of uncertainty avoidance associated with the following tourist decision making process.

6.3.1 External search

Consumers with higher risk tolerance levels tend to seek information from marketer-dominated mass media sources than those with lower risk profile, but only significantly in the case of TV and radio advertising and state/city travel offices. Also, consistent with expectations, medium UA (Uncertainty Avoidance) consumers from Japan sought information from channel members, such as travel agencies, more than the high UA group of Germans, indicative of risk avoiding strategy. However, contrary to expectations, risk tolerant cultures seek information from personal sources more than those are who risk averse.

Hofstede (1991; 2001) argues that culture can be divided into four dimensions. Uncertainty Avoidance or UA is one among four. Hofstede in his survey divided countries and basically culture into three groups of low, medium and high uncertainty avoidance. He believes that uncertainty about the future is a basic fact of human life with people trying to cope through the domains of technology, law and religion.

6.3.2Trip planning

The influence of culture is evident in the way that people plan their trips. Significantly, more of the risk–avoiding Japanese respondents purchased some form of travel package prior to their trip. Also, the risk-averse group tended to pre-package more of the risk-reducing elements of the trip, such as lodging and a guided tour experience at the destination. In contrast to this, the more risk–accepting Germans included rental cars (a high-risk item because of the possibility of getting lost, accident, etc) more than other items in the package. High levels of risk avoidance can also be associated with lengthy decision-making processes because of the need to seek out more detailed information and to consider it before acting.

6.3.3 Travel party characteristics

Travellers tend to experience higher levels of risk perception when travelling alone as opposed to travelling in groups. This is consistent with the notions of "safety-in-numbers".

6.3.4 Trip characteristics

Finally, significant differences between groups have been identified in terms of the length of stay on their trips and the number of locations visited. As might be predicted, respondents from Germany stayed on average three times as long and visited twice as many locations as their Japanese counterparts. In conclusion, the Money and Crotts (2003) study results show that consumers from national cultures can be characterized by their levels of uncertainty avoidance when using information sources that are related to the channel, instead of personal, destination marketing-related, or mass media sources; they also more frequently purchase package tours,

travel in larger groups, and stay on average a shorter time and visit fewer destinations than the relatively higher risk takers.

6.4 Risk perception and the Media

Individuals have most likely always spent a lot of time communicating information about risks to the next generation. New technology has, to some extent, made changes to this process and the traditional way is no longer the only way to transfer knowledge and much of it may come from the mass media (Wahlberg and Sjoberg, 2000). With advances in telecommunications technology, many events today are covered live, or are covered by amateur video cameras and shown later to worldwide audiences (voluntary member of media). Usually, graphic scenes or pictures are presented which have profound effects on the perceptions and attitudes of the public. Harbison 2003 (cited in Taylor 2006, p2) noted:

This is a worrying development. It means that even the destructive up and downs of the past are going to be magnified in the future.

Media are often believed to be very important for risk perception, but how much of the individual's risk perception is really due to the media, which aspects and what are the qualities? There is an extensive belief in the risk research community that the media is influential in terms of creating and shaping people's risk perceptions (Bastide et al.(1989); Keown, 1989 ; Kone and Mullet, 1994, p 24). Some argue that, because the media express themselves in a manner that is understandable to the reader/listener/watcher, it is the most common source of information. Konheim (1988) suggested that most people do not understand and listen to quantitative measures, but to qualitative statements. However, Baired (1986) noted that it is hard to predict just how much and how often people listen to media.

According to Kroeber-Riel (1992), within the various descriptive attempts it is possible to differentiate three distinct approaches of the media:

Reinforcement which is where there is a strengthening and confirmation of existing attitudes and opinions by means of expressed information. Here the recipient is

selective in the information taken in and opposing thoughts are actively avoided (Glaesser, 2003).

Conviction assumes that mass media is in a position to influence the recipient's attitudes and opinions contrary to their own views and in a direction desired by the media. Nowadays, this approach tends to be mostly rejected. Exceptionally, this effect tends to be attributed to themes that indirectly affect the recipient; in other words, which have a more general social relevance and the influence tends to be only superficial or temporary (Dunwoody and Peters, 1992).

Agenda setting is really an extension or continuation of the reinforcement approach, which is dominant in media research, by making certain events a subject of discussion. This is awarded a selection function, which applies, above all, if it concerns topic outside the recipient's personal sphere of experience. Once this selection takes place, the media structures the themes that are subjects of the discussion by assigning to them preferences (Glaeeser, 2003). The difference from daily routine is responsible for negative events having an increased communication probability and quicker dissemination process. Therefore, the significance of a negative event should be rated higher than that of a normal event.

In one study of risk perception, it was found that actual and perceived amounts of technical detail did not correlate (Sandman et al., 1993). The finding from Vallone et al. (1985) shows that when there were clear factions to an issue, both sides found the mass media coverage to be biased against them. This shows that the perception of information draws heavily upon our already existing views. One opinion in the mass media that it is not the content that influences people's opinion, but the sheer amount of coverage (Mazur and Lee 1993).

People have the ability to absorb and process information from the media in different ways dependent not only upon the individual but also on the way that the media covers items. Besides the individual's prior knowledge and opinions about specific matters of risk, their political, geographical and technical knowledge can all help them organise and assimilate information (Converse 1964 in Norris et al., 2003 and Price and Zaller 1993). A study by Soumerai et al. (1992) found that when the mass media

(newspaper and magazines) had a peak in their number of articles about the possible connection between aspirin and Reye's syndrome, "the incidence of the disease went down to almost Zero, and remained that way while the interest of mass media faded". What happened was presumably that people reacted to the risk and changed their behaviour, i.e. they no longer gave aspirin to youngsters who were suffering from a viral disease, the 'at-risk' group.

Some quasi-experimental studies in this area concerned the question of whether the disclosure of a famous athlete being HIV-positive had any effect on people's risk perceptions and behaviour. The results were not very encouraging: although interest in AIDS and related topics increased sharply as measured for example by calls to AIDS hotlines which in some cases remained above baseline for several weeks, factual knowledge and personal risk perception remained virtually unchanged. Tylor and Rasinski (1984) found that the influence of information and effects related to crime were correlated with their perceptions of future risk. One of the difficulties in creating a unified framework to understand these issues is that different kinds of mass media seem to have different impact (Snyder and Rouse, 1995).

Beirman argues that media plays an important role in travel patterns because it has the ability to form the public's perceptions of a specific destination or issue. Beirmann (2003) furthermore added that it is frequent for destination authorities to criticize the media for reacting excessively and giving more prominence to incidents than they actually warrant. The media tend to be selective: they exaggerate some risks and ignore others, "sacrificing objectivity for sensationalism". Johnson and Covello (1987 in Wahlberg and Sjoberg, 2000, p179) also argue this point by saying that "the media engage in selective and biased reporting that emphasizes drama, wrongdoing and conflict". In a similar vein, other researchers suggest that the media focus on rare but dramatic events because they are spectacular and yet ignore more common and serious events that affect people's lives such as road traffic accidents (Soumerai et al.(1992). There are numerous other articles where the same view is presented. Many of them (Singer and Enderny 1987; Karpowicz-Lazreg and Mullet1993 in Wahlberg and Sjoberg 2000) refer to an article by Combs and Solvic (1979) as a proof of this bias.

Glaesser (2003) suggested that 'this is mostly due to invidious comparisons, perhaps due to our insatiable appetite for superlatives' because most often, the news media make comparisons in their stories such as 'the worst terrorist attack against tourists since Luxor', thereby keeping the crisis alive. Furthermore, studies of how the perpetrators of these acts are labelled (e.g., as "guerrillas," "terrorists", or "insurgents") suggest the selective use of these terms by journalists in ways that correspond to the interests of the government (Epstein, 1977). Picard (1988 in Traugott and Brader, 2002 page, 3) "describes a three-stage process of coverage of extended terrorists actions that begins with an initial emphasis on the detail of incidents lasting about two days, followed by an emphasis on government initiated reports of how they are responding with an eventual third phase in which background reporting may focus on explaining the event".

The bias in media coverage is evident in all countries and rarely does the superficial content of news events give rise to a discussion of the underlying causes and the context of the events. Thematic coverage of this sort quickly gives way to a continuing focus on episodic detail of the latest development and government responses (Iyengar, 1991). In this way the media does not provide for the information needs of the population as a whole, leaving it to the more educated to fill in the gaps by undertaking further information searches. According to Norris et al.(2003), public concern often just mirrors the network news coverage. This, of course, may be turned around and it could equally be argued that the news coverage has rightly interpreted public opinion!

In summary, the risk perceptions that travellers hold are based upon a wide variety of factors that range from the culture from which they originate, through to the environment in which events take place and the nature of events to the way in which the media portray the events and keep them alive in peoples' minds. Demographic factors such as age, sex, education and religion all play a part in helping us to understand the different ways in which people react to different stimuli such as terrorist attacks.

Mass media unquestionably generates awareness and has an influence not only on the way in which people react to events but also on the topics that are discussed openly and the opinions that people hold. Glaesser (2003) argues that the way in which the

media bring about real changes in attitudes and opinions depends on a variety of factors. These are aspects that are explored later in this thesis when the responses of individuals from varying backgrounds, cultures, ages and sex demonstrate their own travel risk perceptions to a host of scenarios. The effects of the media were explored in the case studies, both in terms of the magnitude of the impact of serious events and also the ability of the media to act as a positive force by promoting the positive aspects of a destinations following an event.

A national survey of 1,000 Americans (2003) suggested that nearly two-thirds of respondents felt that the media influenced their views on the importance of terrorism as a national problem, according to the Jimirro Center for the Study of Media Influence at Penn State. They added that:

"In this case, the media seems to be heightening awareness of a possible danger, but without a direct, imminent threat, the reports are not causing Americans to significantly change their daily lives," Major said. "There are several reasons for this. First, news stories generally are written with quotes from experts who disagree with one another. One expert is quoted as saying that a disaster in imminent and that citizens should engage in these specific behaviours to prepare, and then another expert is quoted that it is very unlikely that the disaster is actually going to take place.

"Rather than serving to inform the public about the proper preparations to make, the stories leave readers with a sense of ambiguity because even the experts don't agree. Furthermore, stories often fail to clearly outline the steps that people need to take to prepare for disasters,"

(http://www.comm.psu.edu/jimirro/terror10-03.html)

Wahlberg and Sjoberg(2000) argue that 'the big problem in the area of risk perception and media coverage is to ascertain the causal pathways. There seem to be correlations in this area, even though they are unlikely to exceed 0.50, so there is a relationship between these two variables. However, it is not clear if the media content affects people's perceptions, or are the journalists just writing about what they know people already feel are risky activities or is there an interplay'.

It is not unwise to assume that if a negative event happens it is not easy to conceal and this means that businesses and governments should recognise this and know how to respond (Glaesser, 2003).

Conclusion

The goal of this chapter was to examine the concept of risk perception in association with travel and, in particular, with respect to the leisure traveller. There are a variety of risks that may influence the travel decisions of tourists including those relating to physical harm, financial loss and the risk of dissatisfaction from their travel experience. Whether the occurrence of negative events, natural and man-made, is increasing, or whether it is simply that each disaster has a more disturbing impact (Grainger and Crouch 2006), or simply that the mass media influences people in terms of their perception of risk, the end result is the same: people have become more concerned with risk issues when they travel as tourists. The rest of this thesis attempts to examine the travel-risk perceptions of people from a variety of age groups, ethnic origins, gender and educational levels to see if there are any particular correlation that can be measured between these demographics and the levels of travel-risk perceptions. The differences in attitude between different types of travel-risk perceptions will also be examined.

Chapter 7

Methodology

Introduction

This chapter examines the various methodologies that could be used to explore the research hypotheses that underpin this thesis. In so doing, it discusses the advantages and disadvantages associated with each method together with an explanation of the reasoning behind the methodology chosen. Such an examination not only investigates the methodology with respect to the most appropriate tools to be used but also takes into account the nature and scope of data variability that is essential for a thorough examination of the issues. As mentioned earlier (see the introduction), the over-reaching aim of this study is to examine travel risk and travel risk perceptions: a study of travel risk perceptions and the effects of incidents on tourism. The main objectives of this research are:

- To examine the literature with respect to travel risk;
- To determine the effects of major incidents on travel to specific destinations;
- To explore the differences in recovery time and to attribute such differences to factors such as the nature of the incidents or the marketing response of destinations;
- To evaluate the work that has been done in determining risk perceptions;
- To study the travel risk perceptions of travellers from different backgrounds;
- To examine the differences between the perceived risks and actual risks of specific destinations;
- To explore the effects of perceived travel risk on future travel (using Delphi Technique)

7.1 Introduction to the methods

Quantitative research methods were originally developed in the natural sciences to study natural phenomena. There are examples of quantitative methods in the social sciences including survey methods, laboratory experiments, formal methods (e.g. econometrics) and numerical methods such as mathematical modelling(Straub, Gefen and Boudreau ,2004).

Qualitative research methods were developed in the social sciences to enable researchers to study social and cultural phenomena. Examples of qualitative methods are action research, case study research and ethnography. There are different sources for qualitative data such as observation and participant observation (fieldwork), interviews and questionnaires, documents and texts, and the researcher's impressions and reactions.

Qualitative survey method started to gain prominence in development projects during the 1980s, primarily in response to the drawbacks of questionnaire type surveys, which were considered time-consuming, expensive, lacking adequate data and not suitable for an in-depth understanding of many issues (Chambers, 1983 and 1994, Pretty et al.(1995) in Marsland et al.(2001). This led to a polarisation in collection and analysis of information with traditional, quantitative technique on the one hand, and qualitative methods, on the other (see Table 7-1).

The result of this polarisation of approaches and the associated shortcomings was that the users of information were often dissatisfied with the quality of data and resulting analytical conclusions. At the same time, it was recognised that there are areas/interfaces where the two types of approach can benefit from each other, leading in turn to the enhanced quality of information which is required for rational decision-making at the various stages of project and programme (Marsland et al. (2001)).

Table 7-1 Common differences between qualitative and quantitative methods*

	Qualitative	**Quantitative**
Research question	What /why?	How many? Strength of association
Approach	Feasible: natural setting	High controlled: experimental setting
Reasoning	Inductive	Deductive
Hypothesis	Generator	Testing
Sampling	Purposive(evolving)	Statistical
Measurement	Researcher as an instrument (inside view)	Psychological/physiological instrument (outside view)
Data reduction	Words/categories/themes	Numerical(statistical)
Data analysis	Coding/categorizing/comparing	Statistical/inference/statistical estimation

Source: adapted from geocities.com .html

*It is important to note that these differences are not absolute and are often a matter of degree.

The nature of many research topics promotes the adoption of a combined approach utilising quantitative and qualitative techniques. This decision tends to be endorsed by practitioners in the evaluation field who hold the view that both qualitative and quantitative methods contribute to all aspects of evaluate enquiries and can be successfully used together (e.g, Cook, 1995). Researchers, who draw attention to the overlapping nature of qualitative and quantitative methods, validate this approach (Briedenhann and Wickens, 2002). They argue that neither technique is exclusive and that it is acceptable for a single study to utilise both approaches (Wickens, 1999, How, 1998).

However, there are those who argue that these two approaches to research are indeed separate, each reflecting its own view of social reality (Briedenhann and Wickens, 2002). Bryman (2004) argues there seems to be two different versions about the nature of quantitative and qualitative research, and these two different versions have implications in the writer's minds about whether the two can be combined.

- An epistemological version, as in the embedded methods argument and the paradigm argument, sees quantitative and qualitative research as grounded in incompatible epistemological principles. According to this version of their nature, multi-strategy research is not possible.

- A technical version, which is the position taken by most researchers (current research also follows the same direction) gives a greater prominence to the strengths of data-collection and data analysis techniques with which quantitative and qualitative research are each associated and sees them as capable of being fused.

While quantitative approaches are characterized as having breath, and qualitative as having depth, the key is to combine the breadth of one and the depth of the other (Carvalho and Whtye 1997; McGee 2000; Kanbur 2001). Combining the two approaches allows them to inform each other, to fulfil the specific aims of the study and has broad appeal to many researchers, mainly in the socio-economic field. The combined approach certainly offers the best route to appropriate data collection and analyses when faced with information objectives and constraints in data collection and analysis (Marsland et al.(2001)).

However, whilst having many positive aspects, a combination approach raises a number of important issues. The description of the research plan combining qualitative and quantitative components includes how the two methods will address the research questions and/or hypothesis, how the data will be integrated, and how the result will be interpreted, and how the result will be interpreted taking into account data from two different paradigms. Each research question should be able to be identified and addressed through a specific aspect of the data analysis, and data interpretation. The combination of approaches can result in some aspects of the research being appropriately addressed whilst leaving other aspects to only superficial treatment. Furthermore, according to Marsland et al. (2001), the combined approach is often undertaken without adequately identifying the contribution of each method to the study problem.

Advantages of combining both types of research include
http://www.achrn.org/Combining.htm

- Research development: one approach is used to inform the other, such as using qualitative research to develop an instrument to be used in quantitative research;
- Increase validity: confirmation of result by different mean;
- Complementarity: adding information, i.e. words to numbers and vice versa.

Some of the main issues relating to combining qualitative and quantitative research are:

- Reaching beyond single method and single studies;
- Posing the right research question ;
- Developing strategies for comparing/evaluating different data and for reconciling contradictions;
- Extending learning through a programme of combined methods of research.

7.1.1 Models for linking qualitative and quantitative approaches

There are a variety of ways in which qualitative and quantitative methods may be combined in order to enhance the reliability of survey and experiment finding. The final choice of particular instruments and their combination will be conditional on the extent to which they enhance reliability, affect the duration of the study, bring about financial implications and the availability of the necessary expertise(Marsland. et al .2001). There are many descriptions of combined approaches available (e.g. Hammersley 1996 ;Morgan 1998b) and four forms that were used successfully in a single study are shown in Table 7-2.

Table 7-2 Four types of combination of survey instrument

Type of combination	Definition
Merging/Integrated/Triangulation	Methodologically diverse concepts and data are integrated at each stage within the study design to develop a robust understanding and an integrated model tends to involve simultaneous data collection using both qualitative and quantitative procedure.
Sequencing	The alternative use of both qualitative and quantitative approach in data collection.
Parallel/concurrent	Use of selected tools is the simultaneous but separate use of qualitative and quantitative approaches during information gathering.
Coordinated sub-studies	Qualitative studies contribute under umbrella of larger programme project or longer term studies.

Source: adapted from Marsland et al.(2001)

In the field of tourism, it is often impossible to describe the details of tourism development or the difficulties of political interference in survey research (Briedenhann and Wickens, 2002). In such cases, qualitative research is often found to be superior to survey research in describing such processes and constraints. Surveys are, however, a good way to gather basic data and find out what major concerns are present with respect to tourism development.

The survey usually requires the collection of data on a number of variables at a single phase. The purpose of the questionnaire used in this study is to find out relationships between people's attitude and behaviour towards risk-taking and a number of variables such as each respondent's nationality, gender, education and occupation, age band, religion affiliation, number of trips per year and any previous experience of a risky situation. In this way it is hoped to understand the relative travel risk perceptions that people have towards such events as terrorist acts, crime, health issues and satisfaction levels. Furthermore, the relationship between the demographic variables and the expressed travel risk perceptions can also be analysed.

The study also relies upon a Delphi exercise which takes information gleaned from the questionnaire survey and asks renowned experts in the field to comment on the results and express their own opinions.

7.1.2 Sampling

Sampling issues are naturally practical. Scholarly decisions may be driven in part by theoretical concerns, but it is in sampling, perhaps more than anywhere else in research, that theory meets the hard realities of time and cost resources. In an ideal world, a researcher would have ample access to the entire target population of persons in any area of interest with no thought for cost and time. However, in practice this rarely happens. Therefore, the researcher is driven to balance issues of coverage of the topic of interest with the allocation of limited resources (Kemper et al., (2003) in Tashakkori and Teddle, 2003).

Sampling techniques can be divided into two types: probability sampling and purposive sampling (see table 7-3). Purely quantitative studies typically use larger samples selected through probability techniques, while qualitative studies typically use smaller samples selected through purposive techniques. However, neither purposive nor probability sampling techniques are the sole domain of either research tradition.

Table 7-3 Probability and purposive sampling technique

Probability Sampling Technique	Purposive Sampling Technique *
1.Simple random sampling	1. Convenience sampling
2.Systematic random sampling	2. Extreme/deviant case sampling
3.Stratified random sampling o Proportional o Nonproportional	3.Confirming/disconfirming cases and typical case sampling
4.Cluster random sampling	4. Homogenous case sampling
	5. Stratified purposive sampling and random purposive sampling and random purposive sampling
	6. Opportunistic and snowball sampling
* Additional purposive sampling techniques are described by Patton (1990) and include intensity sampling, maximum variation sampling, critical case sampling, criterion sampling, operational construct sampling, and sampling politically important cases.	

Source: adapted from (Kemper et al. (2003) in Tashakkori and Teddle, 2003)

Generally, researchers seek to have a representative sample that can be treated as if it were, in fact, the population. However, it is a rarity when complete representative samples can be achieved, although the probability of creating a representative sample can be significantly enhanced by probability sampling (Bryman and Cramer, 2005).

There are a few guidelines for the sampling size rather than a specific definition. There are of course time and cost restrictions for researchers so the decision on sampling size must also consider these limitations. However, the larger the sample, the more precise the results. This leads authors such as Bryman and Cramer (2005) to state that differences between the sample and the population, because of sampling, can be reduced by increasing sampling size. Furthermore, when collecting data, the problem of non-response has to be taken into consideration. Finally, it is important that the researcher thinks precisely about the type of analysis that is going to take place. In other words, if a cross tabulation is going to take place in order to examine

the relation between the respondents' nationalities and the risk of food poisoning using a 5 Likert scale, then a table with n*5 has to be engendered where 'n' is the number of different nationalities. Therefore, for there to be a sufficient number of cases in each cell a reasonably large sample is essential.

7.1.3 Study design

This study examines some specific aspects of travel -related risk. In particular, it examines the tourists' perception of risk and through this, the likely impact on the demand for travel and therefore the tourism industry. The relevant literature was examined and reviewed earlier in the study. The review informed and helped refine not only the research questions but also the appropriate methodology and primary research needs. In this respect the study adopts a hybrid approach combining both qualitative and quantitative, using a Sequential Approach (see table 7-2) to methods of data collection with a view to minimising the weaknesses of any particular approach. In order to answer the research questions, the primary research in this study has been designed to utilise questionnaire surveys, the findings of which are supplemented by a Delphi exercise to explore further some of the findings from the questionnaire survey.

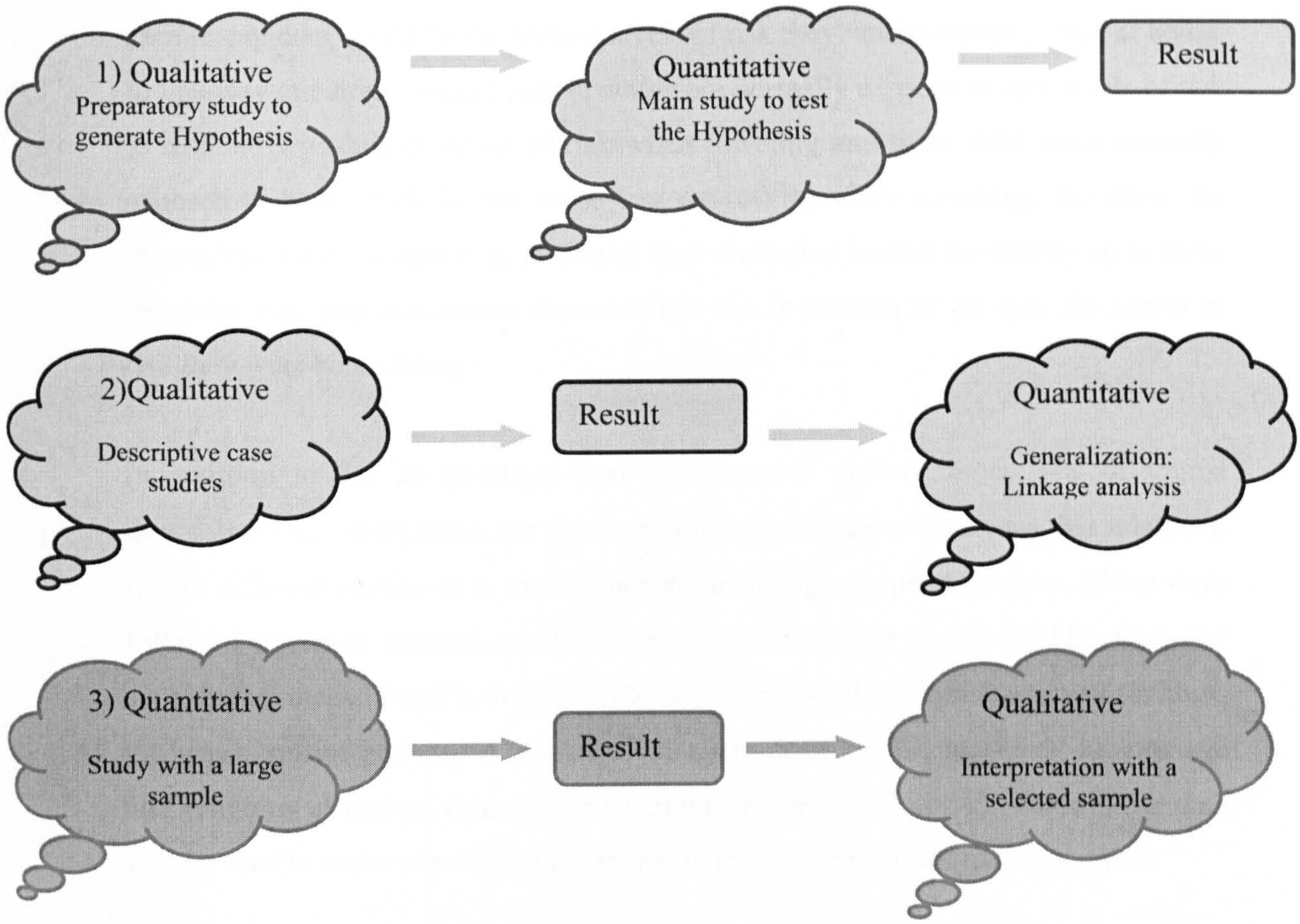
The exact combination of quantitative and qualitative approaches depends on the purpose of the study and the available time, skill and resources. A multi-strategy research approach has been chosen because the researcher cannot rely on quantitative questions alone and must buttress the finding with the combinations of qualitative and quantitative results from the questionnaire survey and then the Delphi exercise. In this regard, the questionnaire survey serves as the preliminary method of data collection based on quantitative methods of data collection with a relatively large sample. The Delphi survey is intended to utilise the experience of relevant experts to explore the likely future of travel to high risk places in general and the Middle East in particular, finally focusing on Iran as a specific issue.

The purpose of the questionnaire survey is to gather information on a wide range of key variables that identify some generic thoughts and perceptions about travel-related risk. Using this information, the researcher can compare the results with the results of

the secondary data (literature) analyses in order to establish significant trends and relationships with respect to travel-risk perceptions. For instance, the development and measurement of people's perceptions about travel risk in order to see the relation between people with different backgrounds and their corresponding risk propensities will help us understand risk in terms of travel decision making. Similarly, comparison of the results relating to individual travel-risk perceptions with previous research into country risk awareness indices will help the researcher understand the relative strengths of travel-related risk perceptions. The self-completion questionnaire survey has been chosen instead of structured interviews because the latter would have been considerably more expensive and time-consuming, because of the cost of travel and the time needed to undertake the interviews. In other words, it was not practical to interview a large sample that is geographically widespread. This research builds on previous studies such as that by Fuchs and Reichel with a sample of 760.

There are different ways of using sequential combinations in mix methods (Maring 2001) (see Models 7-1). For the purpose of this study, the third model has been chosen for the preferred method of data collection. In this model the sequence of design components is reversed, that is, a representative quantitative study is followed by a small-scale qualitative (Delphi) study. The qualitative findings are meant to assist in a better understanding of the meaning of some of the quantitative findings, while the quantitative findings feed into to qualitative findings. Quantitative questions produce quantifiable responses and qualitative questions ask about risk perception and so provide qualitative data.

Models 7-1 Macro sequence of combination



Source: Adapted from Mayring (2001)

The questionnaire was designed to construct a risk index that was focused on 4 distinct areas of risk perceptions expressed by people from different backgrounds (eg nationality…) as follows:

- Physical risk (7 questions)
- Financial risk (3 questions)
- Performance risk (7 questions)
- Socio-cultural risk (3 questions)

Most of the questions were phrased as statements referring to the tourist's perception prior to travel or based on previous travel experiences. For each statement the respondent was asked to indicate to what extent he/she agreed or disagreed with it, on

a Likert scale of 5 points. For example, the risk of getting food poisoning is (Q1). The respondents were asked to make the choices in relation to the levels of risk they would normally feel applied to their situation when not traveling, i.e. the baseline for each respondent would be the normal levels of risk they would expect to face at home. In this way one might expect people who were normally exposed to low levels of risk to respond with higher levels of risk when traveling and those who were normally exposed to high levels of risk to be less risk-averse when travelling. To allow the respondent some flexibility in response, they were also invited to identify up to three countries that they considered to be of high risk in relation to the specific aspect of risk they were considering.

In addition to the 20 questions that measure the various dimensions of tourist destination risk perceptions, the questionnaire included three questions that related to risk in different continents to explore perceptions by geographical region. These were followed by more focused questions relating to countries in the Middle East and surrounding areas. Finally, in order to be able to extrapolate from the survey findings, the questionnaire included a section of 11 socio-demographic questions such as age and religious affiliation (independent variables) (see Appendix 1). These latter data will be used to make some general comments from the responses of the sample.

The first version of 34 questions (including the demographic questions) resulted in a four page survey questionnaire (hard copy) that was pre-tested with 25 academic staff in the School of Services Management at Bournemouth University. Although this was a somewhat biased pilot sample, it facilitated critical feedback so that the questionnaire could be honed to remove ambiguities, clarify obscurities, and incorporate additional aspects that may have been overlooked in the original version. The responses were also helpful in testing out the efficiency of the questionnaire in terms of transferring the data to SPSS for analyses. The questionnaire was then translated into an online questionnaire which resulted in an expansion of the questions from 34 to 62 in order to make the online survey more easily understandable, given the limitations of the online software. The pilot sample that completed the hard copy questionnaire were also asked to complete the online survey to ensure that there was no change in responses. The consistency of the results using the two approaches was confirmed.

Probability sampling procedures using stratified samples were identified as being appropriate for the questionnaire survey. **Stratified sampling** is a commonly used probability method that is superior to random sampling as it reduces sampling error. The researcher first identifies the relevant stratums and their actual representation within the population. Random sampling is then used to select a sufficient number of subjects from each stratum. "Sufficient" refers to a sample size large enough for us to be reasonably confident that the stratum represents the population. In this regard, the sample size had to be large enough to include as many different people with different backgrounds as possible and in sufficient numbers.

A stratum is a subset of the population that shares at least one common characteristic. Characteristic such as nationality, sex, religion, age group and travel party size were initially used to divide the population into groups. However, it was ideal to have samples that capture the various combinations of these characteristics in numbers that reflect their proportions in the travel statistics. In practice, this is a tall order and not feasible given the time and cost of undertaking such a survey. Hence, the researcher set out to get as many respondents from each nationality as possible in the first instance. The sampling frame was drawn from educational institutions inside and outside the UK, including language schools in Bournemouth (34) as they have a variety of foreign students who come to the UK to learn English, private sector organizations from the finance and insurance sectors, local authority personnel and other sources to widen the demographic spread. Bournemouth University staff and students were also targeted together with religious centres such as mosques, churches and synagogues in Bournemouth in order to get as much variety as possible in terms of religious affiliation.

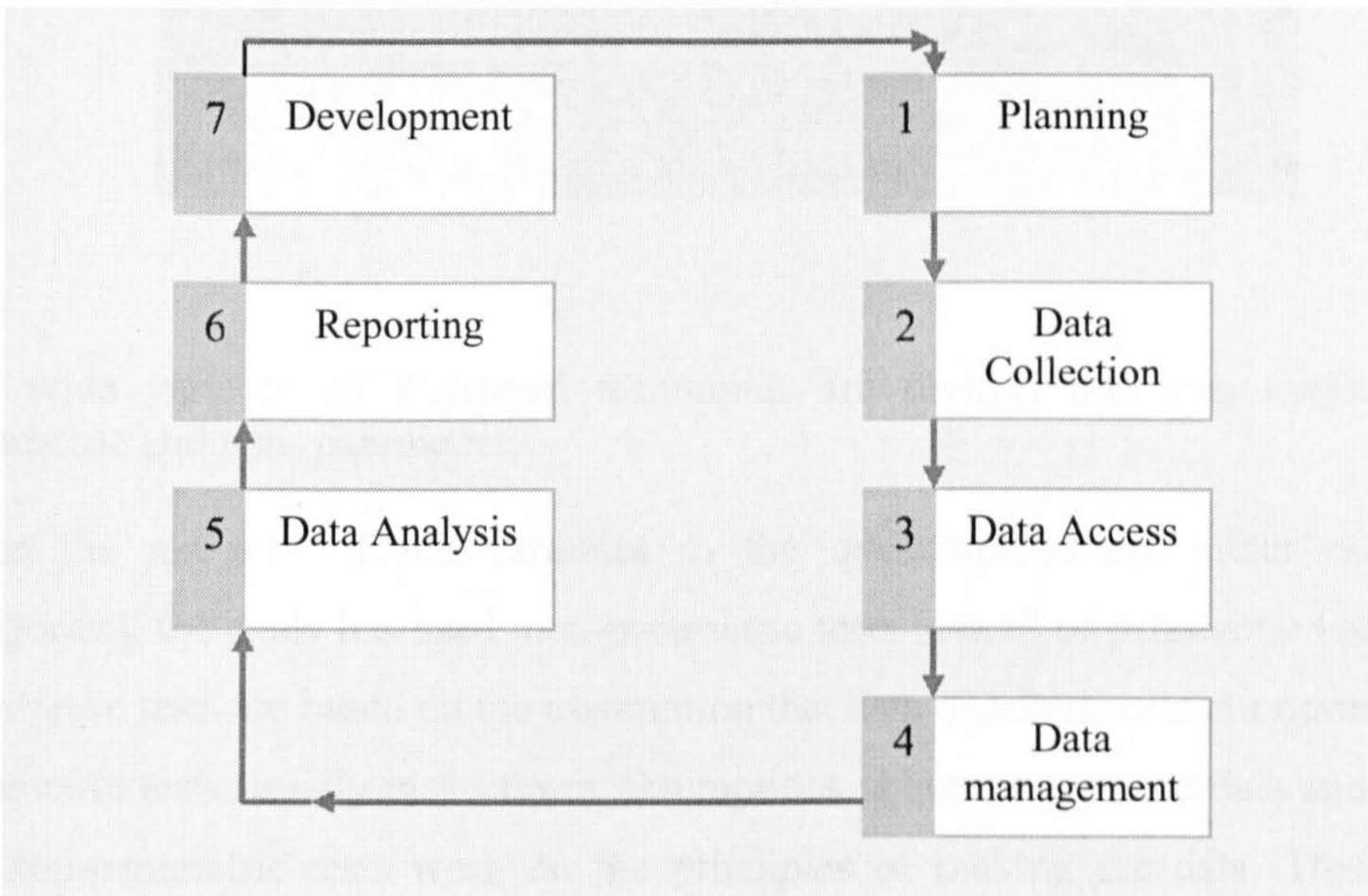
There are different ways of conducting self-completion questionnaires such as supervised, postal and internet. However, considering the sampling frame, current research mostly used self-completion and internet-based questionnaires seemed most appropriate to achieve the numbers and diversity of respondents required. Dependent on the target population, both hard and online copies were used. The hard copy was taken by hand to schools, colleges and religious organisations in Bournemouth and completed either by the researcher or by the respondent while the researcher was

present. Some of the language Schools used the questionnaire as an exercise with their students, explaining the precise meaning of each question to prevent any bias seeping in through language difficulties. The online survey was set up using a facility offered by Bristol University. This manifests itself as a link through the Bournemouth University computer server. In order to build risk indices based on the different nationalities and backgrounds, such as gender, education and religion, the sample size needed to be fairly large and the primary aim of the survey was to achieve 1200 respondents to get a sufficient number.

7.1.4 Questionnaire survey analyses using SPSS

The Statistical Package for Social Science (SPSS) was developed in Stanford University and the University of Chicago in the late 1960's, however since then it has been used globally for a variety of academic areas. SPSS includes a variety of features that enable the user to analyse, manipulate and display the data (Griffith University 2007).

Figure 7-1 The analytical process in SPSS



Source: drive from http://www.spss.com/spss/analytical_process.htm

The appropriate statistical test in SPSS is dependent on the many factors being analysed. In choosing which test is appropriate to use, it is important to consider the types of variables and the likely nature of the problems being explored. There are three types of variables, categorical, ordinal or interval. Categorical data may have two or more different categories but there is no natural ordering to the categories, for example Q34 in the questionnaire. An ordinal variable is similar to a categorical variable; the difference between the two is that there is a clear ordering of the variables; an example of ordinal variable is seen in question Q32 of the survey questionnaire. An interval variable is similar to an ordinal variable, except that the intervals between the values of the interval variable are equally spaced. The only example of interval variable in the questionnaire survey is Q49. It is important to identify the type variable because statistical computations and analyses assume that the variables have specific levels of measurement, for example one cannot calculate the average of nationalities as it is categorical.

Table 7-4 Distribution of variables in the on-line questionnaire

Ordinal	Categorical/ Nominal	Interval
1-40 (all odd numbers) 41-42-43-	44,45,46,47,48,50,51,53,54	49I
52I	…….	……..

The wide varieties of statistical techniques are divided into two major groups Parametric and non- parametric.

Since the majority of the variables in the questionnaire are either ordinal or categorical, the study has used non-parametric tests instead of parametric tests. Non–parametric tests are based on the assumption that data distribution is not normal. Non-parametric tests usually make fewer assumptions about the types of data and most of the non-parametric tests work on the principles of ranking the data. This process results in high scores being represented by large rankings and low scores being represented by low rankings. Therefore, the analysis is then carried out on the rankings rather than the actual data. Some researchers believe that that non-parametric

tests have less power than their parametric counterparts. For the purpose of this study the following non-parametric tests have been used:

- Mann-U-Whitney
- Kruskal-Wallis Test

7.1.5 Mann-Whitney *U* test for two unrelated samples

This test compares the number of times a score from a sample is ranked higher than a score from other samples. An example in the current study would be to compare the responses between males and females with respect to their risk perceptions and if the significant level is ($p<0.05$) then that means there is a statistically significant difference between these two cases. This will be explained further in the next chapter.

7.1.6 Kruskal-Wallis H test for three or more unrelated samples

The Kruskal-Wallis test is similar to the Mann-Whitney *U* test in that the cases in the different samples are ranked together in one series. It can be used when there are more than 2 categories. For example, to see whether there is a difference between people from different religious affiliations, in terms of their ranking of questions 1-to 23 in the risk survey. A value of P greater than 0.05 means that there is no significant difference and less that 0.05 means there is a significant difference. It is worth mentioning that, following the Kruscakall Wallis test, *Post hoc* tests for the Kruskal-Wallis test will be used and to prevent errors the *Benferroni Corrections* will take place, however more details of this procedure will be explained in the next chapter.

In addition to the non-parametric tests, the study included descriptive tests, principles component analysis and factor analyses. These are all discussed in greater depth in the analysis chapter.

7.1.7 Study Limitations

There is almost no research undertaken which does not have limitations or need qualifications applying to its results, and this study is no exception. In the current research the main problems encountered relate to the sample and the number of responses achieved. There are a number of factors that underlie these problems, including:

- The number of schools that failed to cooperate;
- The lack of understanding of English by some of the students (particularly in the language schools);
- Lack of geographical knowledge by some of the respondents;
- Some of the respondents found the questionnaire too long and so failed to participate fully or at all.
- Technical problems concerned with the launch of the first round of the on–line survey that perhaps reduced the number responses;
- Being female (the researcher) has its own limitations in terms of getting access to the population (security...etc);
- The sample size achieves a wide demographic spread but there is a bias in that many are students or academic staff, and many respondents are from the UK

7.2 Delphi technique

The Delphi procedure, named after a Greek oracle at Delphi, was developed by Olaf Helmer for the RAND Corporation in the U.S. He was reputed to have provided visiting Greeks with information about their futures. The technique has been utilized and modified for use in a variety of situations for almost fifty years (Lang, 1998). Norman Dalkey and Olaf Helmer have been credited with creating the Delphi procedure in 1953 in order to forecast a military issue (Lang, 1998). Since its creation, the Delphi procedure has been used frequently to make predictions, elicit opinions, and seek consensus.

Adler and Ziglio (1996) describe the Delphi method as a communication process that is structured to produce a detailed examination of a topic/problem and discussion from the participating group, but not one that forces a quick compromise. Stutter (2004) defines the Delphi method as a way to obtain the opinion of experts without necessarily bringing them together face to face. Linstone and Turoff (1975) argue that the Delphi technique is in essence a series of sequential questionnaire or rounds interspersed by controlled feedback, that seek to gain the most reliable consensus of opinion of a group of experts. It is a technique that is useful for situations where individual judgements must be tapped and combined in order to address a lack of agreement or incomplete state of knowledge (Delbecq et al. (1975)). Turoff and Hiltz (2003) suggested that the Delphi procedure consists of a series of steps undertaken to

elicit and refine the perspective of a group of people who are either in the area of focus or representative of the target group (Rothwell and Kazanas, 1997).

According to Frechtling (1996), the technique is used to acquire information and judgments from participants to facilitate problem-solving, planning, and decision-making. It does so without physically bringing the participants together. Instead, information is exchanged by post, fax, or email between a selected group of experts. This technique is designed to take advantage of participants' creativity as well as the facilitating effects of group involvement and interaction (Dunham, 1998). Most often, this technique is used for forecasting future events or new products. One of the main points behind the Delphi method is to overcome the disadvantages of conventional committee procedures and processes. According to Garrod and Fyall (2005 in Ritchie and Palmer 2005), the Delphi technique is also much admired for its ability to dig beneath the surface of issues and to tap into expertise and insight that otherwise might not be available to the researcher. According to Fowles (1978) and Rowe and Wright (1999), anonymity, iteration, controlled feedback, and statistical response characterize Delphi. The group interaction in Delphi is anonymous, in the sense that comments, forecasts, and the like are not attributed to their originator but are presented to the group in such a way as to prevent any identification.

Stutter (1998) argues that the goal is a continual evolution to "oneness of mind" (consensus means solidarity of belief) the collective mind, the wholistic society, the wholistic earth, etc. However, Gordon (1994) noted that the consensus is less important for many investigations than previously; now a useful product of the Delphi method is crystallization of reasons for dis-sensus. Garodd and Fyall (2005 in Ritchie and Palmer, 2005) also added to the list of applications to which the Delphi technique may be used. Furthermore, Delphi is now seen as, no more, nor less than a systematic means of synthesizing the judgements of experts; the aggregate judgement representing a kind of composite expert composed, in the domain of interest, of the expertise of all participants. Finally, Row et el. (1991) suggest that for Delphi to be useful it should provide more accurate assessment or judgements than those obtained either by individual or by interesting group.

There are three different structures within the Delphi method (Turrof and Hiltz 2003; Stitt-Gohdes and Crews, 2004). These include the Policy Delphi Model, the Trend Model (Turrof 1970) and the Structural Model (Lendaris 1980; Geoffrin, 1987). The

Policy Delphi works toward discovering the strongest pro and con arguments about differing resolutions for a specific policy issue. It does not produce a consensus. The Trend Model first deals with a specific trend that is of concern to the group, and participants project where they believe the trend will go in the next five years. Assumptions and uncertainties are listed when making the projections. The assumptions are voted on for validity. The participants are later asked to review the valid assumptions and re-estimate their earlier trend projections. Structural Modelling allows participants individually to express independent relationships/judgements, but they are used to produce a group or whole model or system. This is supported by Helmer (1977) who notes that the Delphi is a useful communication method among an expert panel that in turn facilitates the formation of a group judgement.

7.2.1 Strengths and weaknesses of the Delphi technique

Like other research methods, Delphi has both adherence and critique . The feedback between rounds can widen knowledge and stimulate new ideas and in itself be highly motivating (Phil, 1971 in Powell 2002) and educational (Stokes 1997 in Powell 2002) for the participants. Murphy et al. (1998) noted that Delphi participants bring a wide range of direct knowledge and experience to be the decision-making processes, while Jones et al. (1992) remark on the benefit of few geographical limitations. Stewart (2001) stated:

> "Its(Delphi) capacity to capture those areas of collective knowledge that are held within professions but not often verbalized, make it enormously useful in thefield of professional education"(p.922).

The Delphi has been described as a quick (Everret 1993), cheap (Jones et al. (1992) and relatively efficient way to combine the knowledge and abilities of a group of experts (Lindman 1975). Not everyone would agree with this. Jairath and Weinstein (1994) and Williams and Webb (1994) argue that extensive time commitment is needed. However, as with any other survey, duration and the cost of survey will be related to the scale of survey.

The Delphi reduces the effect of dominating individuals (the status problem) and allows the group to share responsibility. Shared responsibility helps facilitate the development of consensus. Shared responsibility also promotes satisfaction through participation in and ownership of the resulting decision(s). Controlled feedback

through several rounds of the procedure reduces direct confrontation and the disadvantages that conflict leads to-quickly accepting or dismissing other opinions, focusing on personalities rather than the issues at hand, or closing-off discussion of novel or different ideas are recognized as serious problems for interacting groups (Lang, 1998). Linstone and Turoff (1975) suggest that the Delphi procedure is advantageous in situations where input is needed from more individuals than can effectively meet face-to-face; distance, time, and cost prevent frequent meetings; severe or politically unacceptable disagreements or power struggles are anticipated; communication barriers exist. They suggest that a particularly compelling reason to use the Delphi is when the nature of the needed data does not lend itself to quantitative analysis and can benefit from subjective judgments.

Statistical group response, or the tallying of each participant's valuation of the Delphi responses, ensures that each person's opinion is reflected in the final response. This contributes to the shared responsibility for not only the outcome of the Delphi, but also in the process, that eventually provides the outcome. Lindeman (1975), furthermore, adds that Delphi's systematic control lends an air of objectivity to the outcome and provide a sharing responsibility that is both reassuring and releases the participants from group inhibition. McKenna (1994) noted that Delphi may best be viewed as a useful communication tool to generate debate, rather than reach a conclusion.

Turoff and Hiltz (1996) identify additional advantages of the Delphi in enabling individuals with "differing perspectives and differing cognitive abilities to contribute to those parts of a complex problem" for which they have the prerequisite knowledge and skills and providing flexibility in the way individuals approach the questions. They state that the single most important criterion in the design of a Delphi structure is the provision to enable individuals "to choose the sequence in which to examine and contribute to the problem solving process". They further added that "a person may choose to participate in the group communication process when they feel they want to". Powell (2002) argues that the main advantage of the Delphi is reported to be the achievement of consensus in a given area of uncertainty or lack of empirical evidence (Delbecq et al.(1975), Dawson and Barker 1995, Murphy et al.(1998)).

Anonymity is an important Delphi technique characteristic. Without the identification of those contributing information or making specific judgment, candor may be increased. Anonymity of respondents can reduce the potential for peer pressure, organisational allegiances or personalities to enter into the respondents' judgmental process. This means that the issues involved are more likely to be judged on their intrinsic merit alone, minimising the potential for outside influences to enter the respondent's complex and often controversial judgments. This iteration process gives respondents several 'bites at the cherry' enabling them to think more deeply about the issues at hand, to revisit the problems, and ultimately to apply their expertise. Individuals are at liberty to change their minds from their initial view, and are able to do so without fear of losing face in the eyes of other experts in their field (Row and Wright, 1999 in Ritchie and Palmer, 2005, p. 86). Turoff and Hiltz (1996) cite these advantages of anonymity:

- If a participant provides an idea/suggestion/judgement and in the end it deemed unsuitable, no one loses face;
- When a participant commits his/her name to an idea/suggestion/judgment, it is harder to reject/change it later;
- The idea/suggestion/judgment may be biased by who introduced it if anonymity is not used.

The Delphi also has a number of limitations. Inappropriate choice of the Delphi techniques as a research tool may result in research failure.

Gordon (1994) suggested that Delphi studies are difficult to perform well. A great deal of attention must be given to the choice of participants; the questionnaires must be meticulously prepared and tested to avoid ambiguity.

Delphi needs highly motivated participants. The quality of responses depends upon the interest and motivation of the participants. Multi round studies require a great deal of time: inevitably, some participants will drop out during the process (Gordon 1994).

Linstone and Turoff (1975) outline potential problems which may lead to dissatisfaction and drop out. These include the imposition of constraints on the views

of the participants by excessive structuring of the Delphi questionnaires, failure to take disagreements and divergent views into account in subsequent rounds, and failing to compensate participants adequately for their work.

Sackman (1975) noted that the consensus approach may lead to a watered down version of the best opinion, while Rennie (1981, in Powell 2002) expressed concern that the method generated only bland statements that represented the lowest common denominator.

Armstrong (1978) and Woudenberg (1991) discuss the difficulty in assessing the accuracy and reliability of a method that has judgment and opinion as its basis. Martino (1978) underlines the fact that Delphi is a method of last resort in dealing with extremely complex problems for which there are no adequate models.

Other potential limitations of the Delphi procedure may be the biases introduced by the methods used to selected participants, design questionnaires, and process results. Lang (1998) suggests that selecting as diverse a group as possible may minimize bias due to non-random selection of participants. However, Turoff and Hiltz (1996) point out that the very reason for using the technique may be to elicit the opinions of a small, select group of experts with little diversity. In the instructional development process, there may be increased opportunity to minimize bias by selecting a larger group of more diverse participants.

In addition, participants' responses may be interpreted differently than intended or valued differentially by the investigator. Makridakis and Wheelright (1978) "summarize the general complaints against the Delphi method in terms of (a) a low level reliability of judgements among experts and therefore dependency of forecasts on the particular judges selected; (b) the sensitivity of results to ambiguity in the questionnaire that is used for data collection in each round; and (c) the difficulty in assessing the degree of expertise incorporated into the forecast".

Inclusion as one of the "experts" may be a motive for a participant to be involved, a prestige motive. Other authors have noted that participants are motivated through opportunities to interact with others with similar interests and benefit from the information generated (Turoff and Hiltz, 1996; Lang, 1998).

Imposing the researcher's own views and preconceptions towards a problem can bias the respondent group through the scenarios painted at each round and not allowing for the proper contribution of others to the problems. Finally, it is easy to underestimate the demanding nature of a Delphi. Participants should be properly recognized as consultants and properly compensated for their time if the Delphi is not a part of their job function (Linston and Turoff, 1975).

7.2.2 The rationale for the Delphi technique

The researchers are often faced with a situation in which outside parties have conflicting views on a topic under study. The Delphi technique is widely recognized as a consensus building tool, which has been applied as a means of cognition and inquiry in variety of fields. Gamon (1991) believes that the Delphi technique is particularly suited for evaluation which focuses on the identification of problems and their possible solutions.

Delphi is particularly appropriate when decision-making is required in a political or emotional environment, or when the decisions affect strong factions with opposing preferences (Cline, 2000). The technique is recommended in evaluation studies when conflicts between stakeholders are disruptive, which can become interpersonal and derail the focus of study (Patton, 1997, p151).

However, before deciding whether or not the Delphi method should be used, it is very important to consider the context within which the method is to be applied (Delbecq et al. (1975)). A number of questions need to be asked before deciding whether TO select or rule out the Delphi technique (Adler and Ziglio, 1996):

- What kind of group communication process is desirable in order to explore the problem at hand?
- Who are the people with expertise on the problem and where are they located?
- What are the alternative techniques available and what results can reasonably be expected from their application?

Only when the above questions are answered can one decide whether the Delphi method is appropriate to the context in which it will be applied. Adler and Ziglio

(1996) claim that failure to address these questions may lead to inappropriate applications of Delphi.

Typically, one of the following leads to the need for using the Delphi (Stitt-Gohdes and Crews, 2004):

- The problem does not lend itself to precise analytical techniques but can benefit from subjective judgment on a collective basis;
- More individuals are needed than can effectively interact in a face –to –face exchange;
- Time and cost make frequent group meetings infeasible;
- Disagreements among individuals are so severe or politically unpalatable that the communication process be referred and/or anonymity assured;
- The heterogeneity of the participants must be preserved to assured validity of the result, i.e. avoidance of domination by quantity or by strength of personality (Linstone &Turoff,1975 in Stitt-Gohdes and Crews, 2004).

The Delphi is an enabling mechanism whereby disparate and potentially conflicting opinions and hostile attitudes can be incorporated and dealt with. This approach seemed to be very suitable for the study in hand since tourism in Iran (Middle East) is encapsulated in a complex political environment. The Delphi is looking at predictions that are driven by risk. Risk is assessed by independent judgements of experts – it is ideal for this as it allows the collection of a wide range of independent judgements and enables one to gain:

- A combined assessment of the risk;
- A composite view about speed of recovery;
- A composite set of assumptions used by different experts.

7.2.3 How to conduct the Delphi techniques

Powell (2002) noted that many studies demonstrate some degree of interpretation and flexibility. A classic Delphi survey follows a prescribed set of procedures that reflect both behavioural and statistical processes. Linstone & Turoff (1975) suggested that there are four individual phases in the Delphi process.

- The first explores the subject being researched, giving participants the opportunity to contribute information they feel is appropriate.

- The second phase moves to determine an understanding of how the entire group views the issues.
- The third phase is used to explore disagreement and determine reasons for differences.

- The fourth phase is a final evaluation of all gathered information (Linston& Turoff, 1975).

Typically, three rounds of questionnaires are sent to the expert panel although the decision over the number of rounds is largely pragmatic (Jones et al. 1992). Row (1994) noted that the first round questionnaire is usually unstructured and seeks an open response. This allows the participants relatively free scope to elaborate on the topic under investigation. A qualitative analysis of the result is then undertaken and this provides the basis on which to construct the second round and subsequent questionnaires. Powell (2002) believes that the role of the first round is to identify issues to be addressed in later rounds. Open-ended questions are recognized to increase the richness of the data collected. However, alternative approaches are widely found in the Delphi literature.

The second and subsequent rounds are more specific, with the questionnaire seeking quantification of earlier findings, usually through rating or ranking techniques. Because the researcher feeds back results from previous rounds, there tends to be convergence to a consensus of opinion. Jairath and Weinstein (1994) and Murphy et al.(1998) describe the process of feedback to participants as paramount, since this is the only communication between them. As noted earlier, however, there is a possibility of more than three rounds, but there is need to balance time, cost and possible participant fatigue (Jones et al. (1992); Rowe 1994; Hassan et al. (2000).

Turoff and Hiltz (2003) noted that the particular objectives of Delphi design are also characterised by two practices commonly applied to Delphi studies. First, it should be

clear to the respondents that they do not have to respond to every question, but can decide to take a no judgement view. Secondly, one usually solicits the respondent's confidence in their judgement, particularly when they are quantified judgements. This has been found to improve the quality of the estimates made in Delphi exercises (Dalkey 1970). Successful use of the Delphi involves a communication procedure through which information /feedback/opinion is obtained from the participants. The following (see Table 7-5) summarizes stages proposed by Beech (1999):

Table 7.5 Summary stages of the Delphi technique

1.	Selection of panel (responders) and allocation of identification numbers;
2.	Construction and distribution of first questionnaire (Round One). Completion and return of Round One questionnaire;
3.	Collation and categorization of suggestions and construction of second questionnaire (Round two);
4.	Distribution of second questionnaire (Round Two). Completion and return of round Two questionnaire;
5.	Construction of third questionnaire (Round Three) which is similar to Round Two incorporated;
6.	Distribution of third questionnaire (Round Three). Completion and return of Round Three questionnaire ;
7.	Recollection of individual and group scores for each suggestion;
8.	Achievement of group consensus with calculation of summary statistics: maximum, minimum, and range of score for each suggestion;
9	Distribution and use of finding.

Fowles (1978) also proposed a similar process. Continuation of the process could be repeated if desired. The Coordinator performs iterations of the preceding process until it becomes clear that no new ideas are emerging and that all strengths, weaknesses and opinions have been identified (Dunham, 1998).

7.2.4 Panel selection

The structuring of group communications is an essential component of the Delphi. The contributions of individuals, through this technique, are able to produce a group

view which is not normally achievable (Stitt-Gohdes and Crews, 2004). Critical to this communication process are four factors: "some feedback of individual contributions of information and knowledge; some assessment of the group judgment or view; some opportunity for individuals to revise views; and some degree of anonymity for the individual responses" (Linstone and Turoff, 1975, p.5 & Rowe and Wright, 1999).

In selecting the most appropriate research tool, however, Linstone and Turoff (1975) caution the researcher to consider the circumstances surrounding the "necessarily associated group communication process" (p.6). They suggest these guiding questions: "who is it that should communicate about the problem, what alternative mechanisms are available for the communication, and what can we expect to obtain with these alternatives" (p.6). Wheeler et al.(1990) argue that the Delphi panel needs to be balanced in terms of the successive rounds of the study. Gibbs, Graves and Bernas (2001) in their study of evaluation guidelines for multimedia software used these criteria to determine who should be selected and invited to participate:

- Participants had published articles in the last five years on computer-based courseware design, development, or evaluation;
- Participants had taught courses about the topic; or
- Participants' primary employment responsibilities related to these areas (p.4).

Powel (2003) suggested that heterogeneous rather homogenous groups produce a higher proportion of high quality, highly acceptable solutions (p379). To motivate participants to remain active and complete all the rounds in a Delphi study, it is important that they understand the goal of the study and feel they are a part of the group. The participants must also believe they are able to contribute valuable judgments and help examine the problem via discussion with their peers (Stitt-Gohdes and Crews 2004).

It is clear that there is wide variation in numbers of participants. Reid (1988), for example, noted panel size ranging from 10 to 1685. Turoff and Holtz (2003) noted that Delphi commonly applied to a group of 30 to 100 individuals. Guidance suggested that numbers of participants would vary according to the scope of the problem and resource available (Delberg et al. (1975), Fink et al. (1991), Hassan et al.

(2000) in Powell, 2002). Gordon (1994) noted that most studies use panels of 15 to 35 people. The length of the list should anticipate an acceptance rate between 35 and 75 percent. Murphy et al. (1998) believe that the more participants there are, the better, suggesting that as the number of judges increases, the reliability of a composite judgement increases. However, they also comment that:

"There is very little actual empirical evidence on the effect of the number of participants on the reliability or validity of consensus process". (p.37)

Smith (1995) suggests that the panel size should be determined by the number of experts available, which is typically 40 to 50, but adds that successful Delphi studies have been conducted with as few as four and as many as 904 panellists . Powell (2002) argues that the Delphi does not call for expert panels to be representivative samples for statistical purposes. Representativeness, it seems, assessed on the qualities of the expert panel rather than its numbers. Turoff and Hiltz (2003) suggested that is a good Delphi survey attempts to tackle the problem from many different perspectives. Sometimes this referred to as including questions in the Delphi survey which approach the problem both from the "bottom –up" and from the "top-down" perspectives.

For this study the Delphi Panel was constructed from a group of eminent tourism experts who have achieved international reputations relating to tourism, tourism development and/or tourism in the Middle East. Because the panel was to be used to both ratify the findings from the questionnaire survey and then to move on to examine tourism development in the Middle East, it was felt that a relatively small Delphi Panel could be used.

7.2.5 Analysing the findings

A method of data analysis appears to vary according to the purpose of the Delphi study, structure of the rounds, types of questions and numbers of participants (Powell, 2002). Typically, content analysis techniques are used to identify major themes generated by the initial unstructured questionnaire. These are then translated into a structured questionnaire that forms the basis of the following rounds. Second and subsequent round data, being questionnaire in nature, are analysed using ranking or rating techniques (Jairath and Weinstein, 1994). Third and subsequent rounds should indicate to participants the central tendency and dispersion of scores from the

previous round. A means of showing the dispersion of scores is important, as a bi-modal distribution would demonstrate a lack of consensus that might otherwise be hidden. Participants should also be given an indication of where their score was placed in relation to the overall picture. The opportunity to revise previous scores in light of this is an important element in the move towards consensus (Powell et al. 2002).

The Delphi provides different opportunities to researchers to researcher than survey research. Essential components of the Delphi technique include the communication process, a group of expert, and essential feedback (Stitt-Gohdes and Crews, 2004). The technique benefits from being a democratic and structured approach that harnesses the collective wisdom to participants (Powel, 2003, p181). Its most significant strength lies in the ability to garner opinion and seek consensus among a diverse group of participants.

7.2.6 Identifying sampling technique, population and sample

There a number of approaches that could be taken in order to capture as much information as possible whether qualitative or quantitative, and it is dependent on what the research is intended to achieve. This research has taken a **stratified purposive** sampling, where selection is targeted to be representative of each continental base in terms of the level of development, to find out if there are any significant differences in attitudes and perceptions between people coming from different cultures and income levels in the different continents. According to the definition of the technique, it involves purposefully selecting target populations into strata (e.g., above average, average, below average) with the goal of discovering elements that are similar or different across the subgroups.

7.2.7 Selection of Academics

The academics have a significant role as a primary source of data collection for this study. This is because, as mentioned earlier, the Delphi technique will take place after the questionnaire survey and academics will be chosen from the preliminary list of academics from the questionnaire surveys for Delphi technique. The nominators were identified from:

a) The International Academy for the Study of Tourism (IAST);

b) Annals of Tourism Research.

However, many of those who were selected are in the current study of the literature.

7.2.8 International Academy for the Study of Tourism (IAST)

The IAST is incorporated as a non-profit corporation with its official headquarters in the School of Hotel and Tourism Management, The Hong Kong Polytechnic University, and Hong Kong.

The goal of the Academy is to further the scholarly research and professional investigation of tourism. Related objectives include: (a) encouraging the application of tourism research findings and (b) advancing the international diffusion and exchange of knowledge about tourism. Its membership is comprised of 74 (founding members and members) highly accomplished tourism researchers from throughout the world.

7.2.9 Annals of Tourism Research

Annals of Tourism Research is a social sciences journal focusing upon academic perspectives on tourism. While striving for a balance of theory and application, Annals is ultimately dedicated to developing theoretical constructs and new approaches which further an understanding of tourism. Its strategies are to invite and encourage offerings from various disciplines; to serve as a forum through which these may interact; and thus to expand the frontiers of knowledge by contributing to the literature on tourism social science. To perform its role in the development of a theoretically integrated and methodologically enriched multidisciplinary body of knowledge on tourism, Annals publishes manuscripts dealing with various aspects of this phenomenon. Papers on anthropological, business, economic, educational, environmental, geographic, historical, political, psychological, philosophical, religious, sociological, inter alia, aspects of tourism (including conceptual essays, case studies, and industry -oriented expositions) may be submitted. Purely descriptive manuscripts which do not contribute to the development of knowledge are not considered suitable.

There are more than 100 editorial board members of Annals of Tourism Research. However, some of them are also members of IAST and among them are some whose work has been used in the literature.

7.2.10 Delphi methodology (sampling, rounds and analyses)

The sampling method that has been adopted is a stratified purposive sampling, as explained earlier in countries selection. It has been decided to select four candidates from each region as follows:

1. Both from IAST and Annual equally(if its possible);
2. Select four more as reserves candidates in case some of the earlier ones selected chose to decline;
3. Furthermore, it has been tried to choose people whose PhD was achieved in the same country in which they work, geographical area of research and area of research.

Initially 49 participants were selected; all the three rounds of the survey took the form of a letter dispatched by email from 2 March 2007 to May 2007. In the first round the letter elucidated the objective of the study and the number of rounds in brief and anonymity was guaranteed and, finally and most importantly, asked them if they were willing to participate. It also explained that their contribution would be very important for this research.

Analysing the responses does not require complex statistical tests. The percentage of the responses in the frequency table has been taken into account to summarise the responses. Theses were sent to panellists and they were asked to revise their decision if they so wished. However, because there are two sets of scores to compare from the same participants the non-parametric test of Wilcoxon Signed-rank is used because a non parametric test is needed as the data distribution is not normal and the variables are not interval data. The test will show if the ranking by each panellist has changed significantly between each two rounds. The detail of analysis and the finding of the Delphi will be explained in chapter 9.

Conclusion

This chapter outlined the methods that were used in colleting data, the reasoning behind them, and the limitations of data collections. It explained that this study uses a hybrid method of data collection starting with quantitative survey or quantitative

method of data collection and concluding with a qualitative method using the Delphi technique. It also explained the process of the data collection for the current study. The next chapter will go through the questionnaire, the tests that have been used to analyse the data, and the analysis itself and the final product of the questionnaire survey.

Chapter 8
Questionnaire analysis

Introduction

The previous chapter outlined the methodology used to undertake this study. This chapter focuses on the first part of the data collection (questionnaire survey) and explains various methods that have been utilised to analyse the data in more detail and the outcomes of the questionnaire survey.

8.1 A brief to the questionnaire

A total of 781 questionnaires were completed, 322 male respondents (41.2%) and 427 (56%) female respondents. The ages range from 16 to over 60 years old, as shown in table 8-1. The respondents were asked to register their perceptions on 124 different aspects of travel-related risks and to identify their demographics. The largest category of respondents was students (a bias introduced because of the way in which the data were collected) and the most frequently identified nationality was British (again because of the manner in which the data were collected). More than 70% of respondents travelled more than once a year and only 2% of the respondents travelled less than once per annum. In terms of their marital status and age groups, 62% of respondents were single while the largest age category (48%) was people between the ages of 18 and 29.

Table 8-1 Descriptive difference of respondents in terms of demographics

Age in band	Frequency	Percentage
18<	76	9.7
18-29	377	48.3
30-39	127	16.3
40-49	79	10.1
50-59	73	9.3
60+	76	3.5
Missing	22	2.8
Gender		
Male	322	41.2
Female	427	56.0
Missing	22	2.8
Marital statues		
Married	195	25
Single	490	62.7
Other	73	9.3
Missing	23	2.9
Number of annual travels(X)		
X=0	17	2.2
X>=2	399	51
2<X<=5	242	31.1
5<X<=10	49	27
X>10	22	38
Missing	52	6.7
Occupation		
Student(1)	442	56.6
Employee(2)	75	9.7
Teacher(3)	151	19.3
Manager(4)	57	7.3
Retired(5)	14	1.8
Business(6)	13	1.7
Missing	28	3.6
Education		
Primary	28	3.6
Secondary	166	21.1
Degree	313	40.1
Postgraduate	239	31
Missing	50	6.4
Region		
Africa	8	1
North Africa	11	1.4
Latin America	12	1.5
Europe	544	69.7
Asia	101	12.9
Middle east	55	7
Missing	50	6.4
Religion		

Christian	356	45.6
Jewish	5	0.7
Islam	74	10
Other	33	4.4
Not affiliate with any formal religion	275	37
Missing	38	4.9

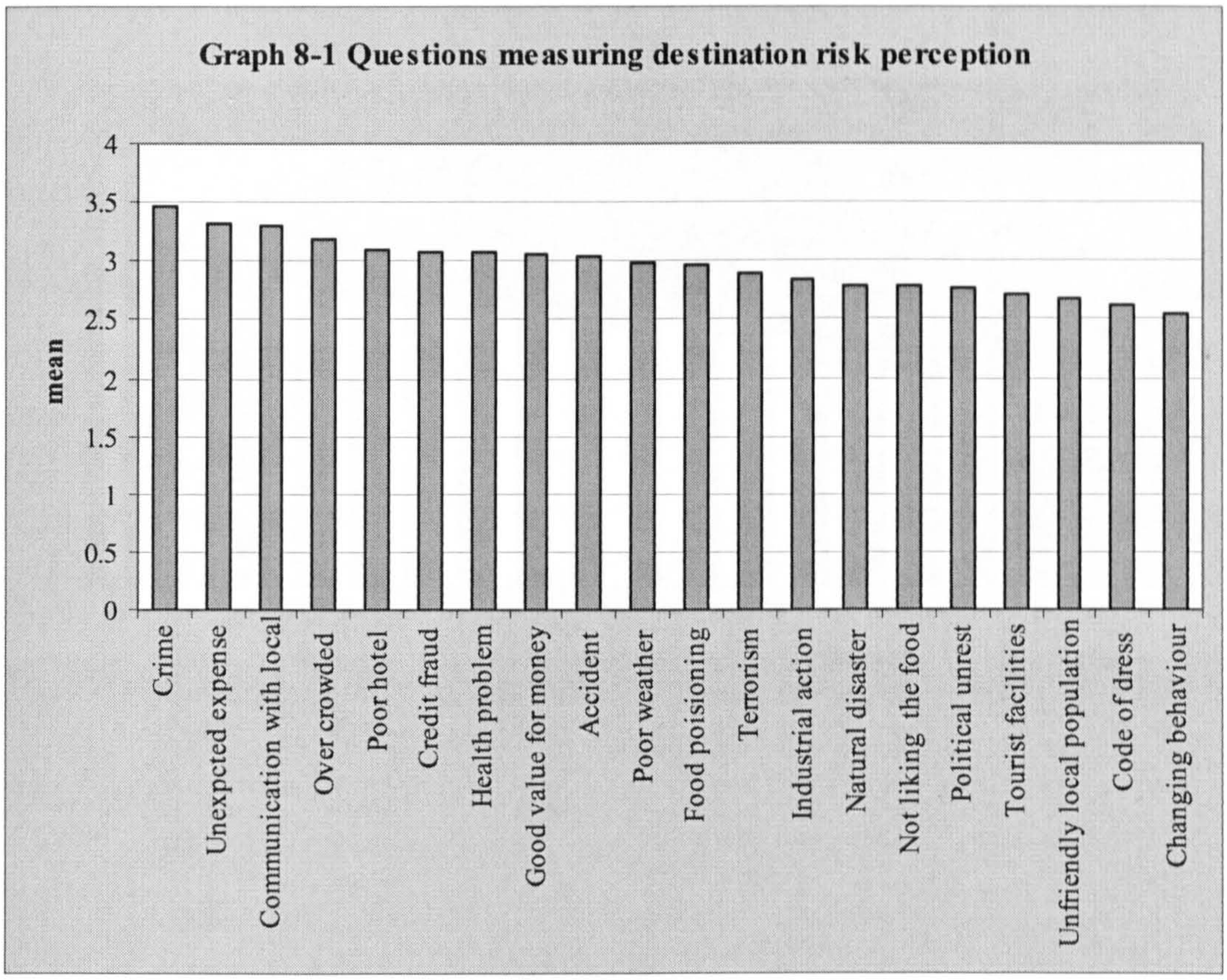
8.2 Analyses

The first step undertaken was to build an index of people's risk perceptions on the basis of the mean of 20 questions that measure overall destination perception risk. A Cronbach's alpha test was employed to ensure the reliability of the index for overall risk perceptions. The Cronbach's alpha test, over all risk questions, was 0.8962 and it should be noted that deleting one of the questions did not significantly improve the alpha score.

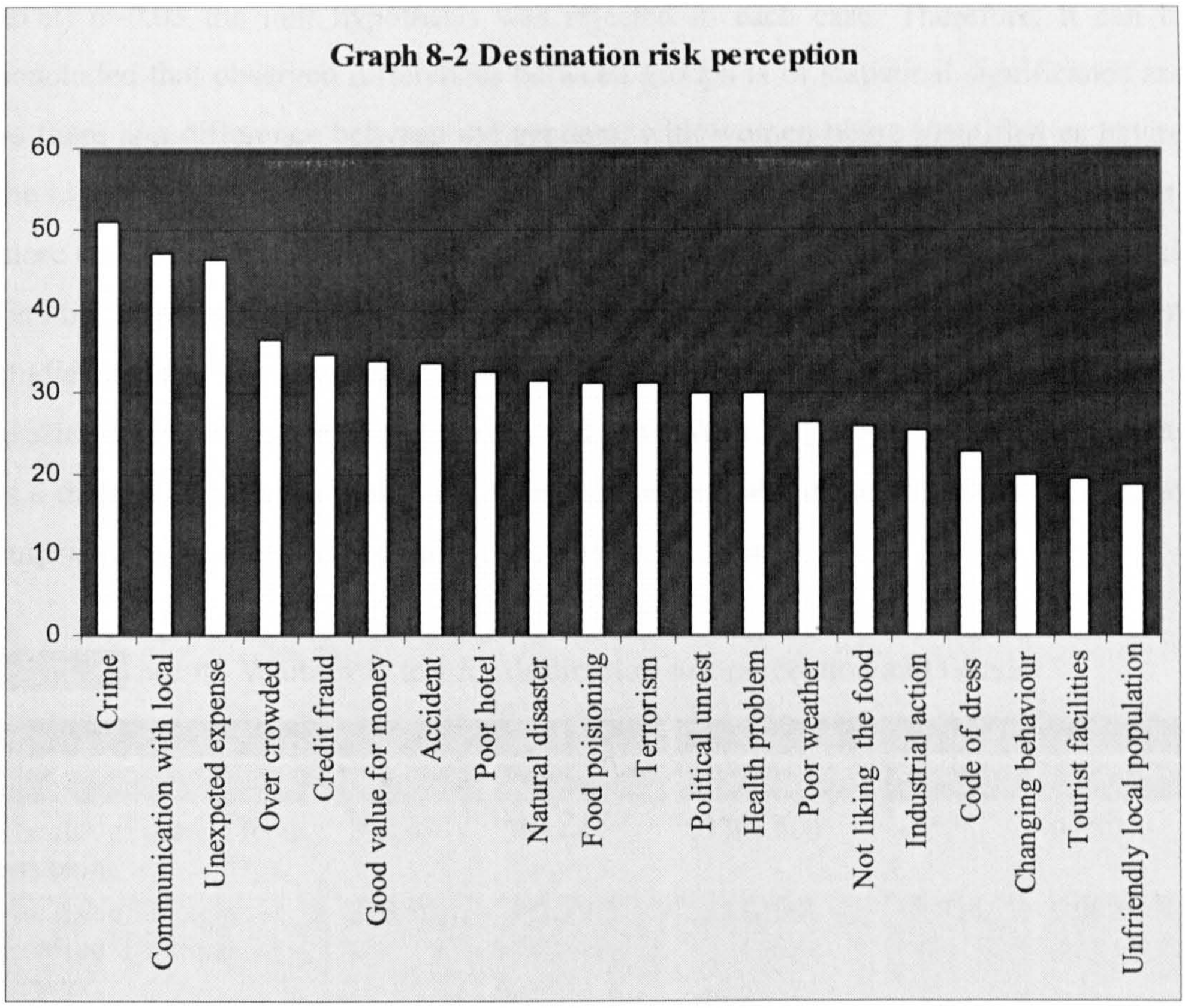
Table8-2 Questions measuring destination risk perception and Cronbach's Alpha results(N=781)

Types of risks	Mean	Alpha if item deleted
The risk of getting food poisoning is...	2.96	.891
The risk of having health problems is..	3.07	.891
The risk of being involved in a natural disaster (eg earthquake/Storm) is...	2.78	.890
The risk of getting injured in an accident (eg car, bus,...) is...	3.05	.890
The risk of crime (theft, robbery, and pickpocket) is...	3.46	.890
The risk to me by acts of terrorism is...	2.90	.891
The risk of being exposed to danger due to political unrest (civil unrest) is...	2.76	.888
The risk of not getting good value for money is...	3.06	.895
The risk of incurring unexpected expenses is...	3.31	.893
The risk of suffering as a result of credit card fraud is...	3.07	.891
The risk of experiencing poor weather is...	2.99	.896
The risk of having to put up with poor hotel accommodation is...	3.10	.891
The risk that the place will be overcrowded is...	3.19	.892
The risk that I will not like the food is...	2.78	.893
The risk that my travel will be disrupted because of possible industrial action/strikes (eg at the airport, railways, buses)is...	2.84	.890
The risk that the tourist facilities will not be acceptable(eg beach) is...	2.71	.890
The risk that the local population may not be friendly is...	2.68	.889
The risk that my trip might change my own behaviour is...	2.54	.892
The risk that my code of dress and behaviour will not be well received by the local people is...	2.62	.890
The risk of not being able to communicate with local people (language) is...	3.30	.893

Note: a reliability coefficient of .70 or higher is considered "acceptable" in most Social Science research situations(field,2005)



Following on from developing an index on the basis of the overall risk, it is useful to construct a second index that utilises the higher 4 and 5 rankings for each question. In this way, the higher perceptions of risk can be compared with the mean, to look for any significant differences. The results are shown in the following graph and in the majority of the cases the rankings are quite similar to those derived when using the mean measurement. Both results show that crime has the highest mean (Graph 8-1) and most frequent 4 and 5 answer(Graph 8-2), while the risk of terrorism, in spite of what one might have expected from the literature, took 11th place and people seem to be more concerned about financial risks than any other form of risk. It may be because people are not actually presented with the actual imminent danger of terrorism or because people mostly see the terrorism in the media as more likely to affect other people "third person effect" than them (Duck and Mullin 1995).



8.2.1 Non-parametric tests

The next step was to examine the relationship between the demographic variables and the way in which people responded to each of the questions. It was also felt to be prudent to see how previous experience can actually make a significant difference to the way that people perceive travel-related risks. This latter line of enquiry being based on the assumption that people who have had unpleasant experience(s) are more aware and wary of such risks than people who have not previously had such negative experiences.

The data were analysed to determine whether gender influenced the perceived level of risk in each of the risk areas. This analysis looked to see if there is any difference in the ranking of perceived risk levels between men and women. The results of the Mann U Whitney test are shown in Table 8-3. It can be seen that, in all cases, there was a significant relationship in half of the cases which means at alpha (significance

level) p=0.05 the null hypothesis was rejected in each case. Therefore, it can be concluded that observed differences between groups is of statistical significance and so there is a difference between the genders, with women being identified as having the higher levels of perceived risk. In other words, there is evidence that females are more concerned about travel risks than their male counterparts (See Table 8-3) . This finding supports what had been uncovered during the analysis of the literature where studies such as that by Lepp and Gibson (2003) revealed that women perceived a greater degree of risk regarding health and food. Wandel (1994) also found that there is a difference between males and females, but only about the "fat issue" where, not surprisingly, women seemed more concerned than men.

Table 8-3 Mann- Whitney U test for destination risk perception and Gender

	Mean Ranking				
Types of risks	Male	Female	MUW	z	P<0.05
The risk of getting food poisoning is:	328.47	381.64	53363.500	-3.526	0.0004
The risk of being involved in natural disaster	328.86	387.79	53637.000	-3.854	0.0001
The risk of terrorism	327.02	391.03	53116.000	-4.193	0.0000
The risk of being exposed to danger due to political unrest	338.51	369.83	56511.500	-2.071	0.0383
The risk of place being over crowded	334.95	379.06	55435.000	-2.979	0.0028
The risk that I will not like the food	347.43	379.60	59459.500	-2.106	0.0352
The risk of possible industrial action	339.48	375.77	56806.500	-2.430	0.0150
The risk that tourist facilities will not be acceptable	340.28	378.58	57086.500	-2.564	0.010
The risk of my code of dress not being received by the local people	339.59	375.70	56838.500	-2.375	0.0175
The risk of not being able to communicate with local people	343.19	374.06	58009.000	-2..030	0.0423

However, when undertaking Mann U Whitney tests, the results indicated that there were no statistical differences between the genders in terms of their perceptions of

financial and crime risk. Indeed further examination of the data relating to those who had responded at either the 4 or 5 level ratings shows that there was only one aspect that demonstrated a significant difference between the genders, that being the risk of overcrowding at the 5 level where female respondents appear to be more concerned. Research by others also revealed gender differences with respect to environmental concerned, with females tending to show more concern and behavioural adjustment (e.g., Zelenzy, Chua and Aldrich in Hunter et al. (2004)). This could also explain why there is a significant difference between males and females, where females seem more concerned with cultural risks in the Middle East, or why females see Iran and Saudi Arabia as more risky than males. The restrictive policies towards females make them think that they will have to sacrifice some of their civil liberties to go there. Furthermore, it shows that even if there was no war in the Middle East or political tension (claimed to be the main reasons for damaging the pull factor of the region) the cultural barriers can also harm the image of the region where perhaps attracting family or females is far more challenging.

Table 8-4 shows the results of the analysis of differences between the marital status of respondents and their perceptions of destination risk. To test whether there are any differences between marital status and the way people perceived risk, the Kruskal Wallis Test was applied.

Table 8-4 Kruskal-Wallis for the destination risk perception and marital status

Types of risks	Marital status	Mean ranking	Chi-square	Asympt.sig
The risk of suffering credit card fraud is :	Married Single Other	393.36 350.14 396.73	7.959	0.019
The risk that I will not like the food is:	Married Single Other	326.11 378.11 382.47	9.282	0.010
The risk of my code of dress not being received by the local people is:	Married Single Other	331.32 373.65 344.10	6.306	0.043

The identification of a significant p-value in Kruskal Wallis is not, on its own, sufficient to demonstrate this relationship. A significant p-value only shows that the

mean rankings are not equal (i.e., rejects the null hypothesis); it does not, on its own, say which mathematical means are significantly different from which other ones. Therefore, to examine the numbers more fully, so that it is able to establish where the significant differences are, it is necessary to undertake a *post hoc* test that allows the production of multiple comparisons between means of a factor. These comparisons are usually not planned at the beginning of the study but are suggested by the data during the course of study for dependent variables.

Following the Kruskal Wallis test, the Mann-Whitney test was applied to each pair of groups and adjusted *a* value with an approximation to the Bonferroni method. The Bonferroni adjustment is simply to multiply the p value by the number of paired comparisons being made before deciding if it is significant or not. For the current data there are three groups, the pair comparison was taken for all three groups and if there was a $p<0.05$ then p had to be multiplied by the number of pairs and if the p value was still smaller than the 0.05 (Bonferroni adjustment) then that pair can be considered to be significantly different (see table10-5). Thus, to calculate the number of pair comparisons for k groups: The number of paired comparisons = (k x (k-1)) / 2.

Table 8-5 Mann U Whitney post hoc test for marital status and destination

Types of risks	Marital statues	Mean ranking		Asympt.sig
The risk of suffering credit card fraud is :	Married-single	358.71	317.75	0.0405
The risk that I will not like the food is:	Married-single	296.23	343.18	0.0096
The risk of my code of dress not being received by the local people is:	Married-single	297.39	335.84	0.0453

The Kruskal Wallis test results show that there are significant differences among them somewhere – which is what leads to the *post hoc* tests. The three categories of marital status in terms of risk relating to credit card fraud, not liking the food, and the code of dress, the Post Hoc Paired Comparisons after Kruskal, the Mann U Whitney test show that in fact, the only statistically significant result is between the married and single categories. While the evidence suggests that single people are more concerned with performance risk, the same analysis shows that married people are more concerned

with the financial risk involved in travel. It is worth mentioning that in the current survey more than 60% of married people were younger than 49 years old and perhaps with dependent children and therefore with relatively more limited financial resources. The same methodology was used to examine the relationships between perceived risk and age. The results are shown in Table 8-6.

Table 8-6 Kruskal-Wallis for the destination risk perception and age band

Types of risks	Age band	Mean ranking	Chi-square	Asympt.sig
The risk of getting food poising is:	18<	268.81	28.045	0.00003
	18-29	351.10		
	30-39	405.81		
	40-49	373.26		
	50-59	380.16		
	60+	446.84		
The risk of incurring unexpected expense	18<	267.47	24.992	0.0001
	18-29	356.76		
	30-39	410.38		
	40-49	381.44		
	50-59	362.54		
	60+	402.26		
The risk of suffering as a result of credit card fraud	18<	299.98	15.347	0.009
	18-29	355.42		
	30-39	393.20		
	40-49	386.69		
	50-59	401.80		
	60+	414.18		
The risk that I will not like the food	18<	440.34	24.635	0.0001
	18-29	378.73		
	30-39	357.00		
	40-49	309.11		
	50-59	300.76		
	60+	367.52		
The risk of my code of dress not being well received by the local people	18<	366.70	19.315	0.002
	18-29	378.60		
	30-39	385.02		
	40-49	314.89		
	50-59	299.21		
	60+	277.98		
The risk of not being able to communicate with local people	18<	262.17	23.234	0.0003
	18-29	377.86		
	30-39	380.31		
	40-49	327.84		
	50-59	376.14		
	60+	371.31		

Table 8-7 The *post hoc* Mann u Whitney test for the age and perceived risk

Types of risks	Age band	Mean ranking		Asympt.sig
The risk of getting food poising is	18<and 18-29 18<and 30-39 18<and 40-49 18<and 50-59 18<60+	177.88 75.75 64.65 58.67 43.86	227.52 110.51 87.20 73.28 67.89	0.0195 0.0075 0.015 0.0015 0.003
The risk of incurring unexpected expense	18< and 30-39	72.62	108.55	0.0075
The risk of suffering credit card fraud	18<60+			0.0375
The risk that I will not like the food	18<and 50-59	85.09	58.35	0.0075
The risk of my code of dress not being received by the local people	18-29 and 50-59	76.24	63.67	0.03
The risk of not being able to communicate with local people	18< and 18-29 18< and 30-39 18< and 50-59	158.35 75.26 59.60	226.80 106.88 82.56	0.0075 0.0075 0.0075

The results in Table 8-7 show that the only significant difference is between the category "under 18" compared with other categories, whilst the youngest category are less concerned. This may be because they are not decision makers and in most cases the decision is being made for them.

Table 8-8 demonstrates the results of occupation and perceived risks; it follows the same routine as those above.

Table 8-8 Kruskal-Wallis for the destination risk perception and occupation

Types of risks	Occupation	Mean ranking	Chi-square	Asympt.sig
The risk of getting food poisoning is:	Student (1)	432	19.008	0.002
	Employee (2)	72		
	Teacher (3)	129		
	Manager (4)	53		
	Retired (5)	7		
	Business (6)	12		
The risk of being exposed to political danger due political unrest	Student (1)	426	11.575	0.041
	Employee (2)	69		
	Teacher (3)	129		
	Manager (4)	54		
	Retired (5)	7		
	Business (6)	13		
The risk that I will like not the food	Student (1)	433	17.610	0.003
	Employee (2)	73		
	Teacher (3)	140		
	Manager (4)	53		
	Retired (5)	7		
	Business (6)	13		

Table 8-9 Post Hoc Mann u Whitney for occupation and perceived risks

Types of risks	Highest level of education	Mean		Asympt.sig
The risk of getting food poisoning is:	Student-employee	244.94	297.89	0.0435
The risk that I will not like the food	Student-teacher	300.27	245.95	0.002

The results show that there is only a small but significant difference between the type of occupation and the perceived level of risk. For example, that between students and employees, in terms of the risk of getting food poisoning, and between students and teachers in terms of not liking the food.

The results show that, in terms of the level of educational attainment, there are some significant differences, mostly between people with primary education and those who fall into the other categories. People with primary level of education in all cases have a lower mean compared to the other groups. There do seem to be some

differences between the way people with undergraduate degrees and postgraduate levels of education perceive the risks of communication and codes of dress, where the people with degree level education gave higher rankings than those with postgraduate degrees. The only other significant difference is found between secondary levels of education and those with postgraduate education. If education is a proxy for awareness or some other psychological trait that helps determine the way that people consider risk, then this is reflected in the primary education versus other categories. However, it is more of a challenge to believe that this explains the difference between graduate and post-graduate respondents except, perhaps, through the maturity of the respondents.

Table 8-10 Kruskal-Wallis for the destination risk perception and educational attainment

Types of risks	Highest level of education	Mean ranking	Chi-square	Asympt.sig
The risk of getting injured in car accident	Primary	237.32	18.148	0.0004
	Secondary	392.22		
	Degree	366.81		
	Postgraduate	338.52		
The risk of incurring unexpected expenses is	Primary	247.94	13.945	0.003
	Secondary	328.92		
	Degree	373.86		
	Postgraduate	363.34		
The risk that I will not like the food is	Primary	460.30	13.099	0.004
	Secondary	382.07		
	Degree	359.29		
	Postgraduate	332.68		
The risk that my code of dress and behaviour will not be received well by the local people is	Primary	371.52	14.044	0.003
	Secondary	384.07		
	Degree	367.55		
	Postgraduate	314.47		
The risk of not being able to communicate with local people	Primary	309.00	13.469	0.003
	Secondary	354.99		
	Degree	382.95		
	Postgraduate	322.08		

Table 8-11 The *post hoc* test (Mann U Whitney) for the destination risk perception and educational attainment

Types of risks	Highest level of education	Mean ranking		Asympt.sig
The risk of getting injured in a car accident is:	Primary-secondary Primary-degree Primary-Postgraduate	62.64 112.18 91.50	102.83 172.56 127.61	0.0012 0.0048 0.048
The risk of incurring unexpected expenses is:	Primary-degree Primary-Postgraduate	112.06 87.96	171.13 128.124	0.0078 0.0246
The risk that I will not like the food is:	Primary-Postgraduate	167.73	121.93	0.0066
The risk that my code of dress and behaviour will not be received well by the local people is:	Secondary-postgraduate Degree-postgraduate	213.21 277.35	175.52 238.63	0.0036 0.0162
The risk of not being able to communicate with local people:	Degree-postgraduate	280.53	235.38	0.0024

Similarly, the differences here are in accord with those identified in Table 8-9 because the majority of respondents with primary education are people under the age of 18 and perhaps the same reasoning applies here.

Table 8-12 Kruskal-Wallises for the destination risk perception and religious affiliation

Types of risks	Religion	Mean ranking	Chi-square	Asympt.sig
The risk of terrorism	Christian	360.78	9.766	0.045
	Jewish	465.70		
	Islam	350.22		
	Others	436.73		
	Not affiliated	336.57		
The risk of not getting good value for money	Christian	358.79	17.042	0.002
	Jewish	406.60		
	Islam	430.45		
	Others	292.03		
	Not affiliated	335.28		
The risk of experiencing poor weather	Christian	351.78	13.929	0.008
	Jewish	488.30		
	Islam	422.94		
	Others	305.42		
	Not affiliated	345.68		
The risk that I will not like the food	Christian	376.46	23.143	0.0001
	Jewish	110.50		
	Islam	415.74		
	Others	281.38		
	Not affiliated	331.48		
The risk that the local population might not be friendly	Christian	354.27	16.369	0.003
	Jewish	612.88		
	Islam	411.15		
	Others	296.64		
	Not affiliated	345.53		
The risk that my trip might change my own behaviour	Christian	354.29	13.011	0.011
	Jewish	472.50		
	Islam	362.24		
	Others	242.12		
	Not affiliated	361.97		
The risk of not being able to communicate with local people	Christian	360.51	26.007	0.00003
	Jewish	386.30		
	Islam	278.45		
	Others	241.36		
	Not affiliated	379.84		

Table 8-13 The *post hoc* test (Mann U Whitney) for destination risk perception and religious affiliation

Types of risks	religion	Mean ranking		Asympt.sig
The risk of not getting good value for money	Christian- Islam	196.22	237.85	0.045
	Islam- Not affiliated	57.95	38.80	0.017
	Others- Not affiliated	203.98	158.99	0.002
The risk of experiencing poor weather	Christian- Islam	197.88	238.92	0.0500
	Islam- Not affiliated	197.30	160.12	0.022
The risk that I will not like the food	Islam –Others	60.15	40.21	0.015
	Islam- Not affiliated	199.70	160.36	0.02
The risk that local population might not be friendly	Christian-Jewish	170.51	223.90	0.006
The risk that my trip might change my own behaviour	Christian -Others	191.36	131.14	0.013
	Others- Not affiliated	102.94	152.05	0.011
The risk of not being able to communicate with local people	Christian- Islam	213.38	165.13	0.012
	Christian -Others	191.65	128.15	0.007
	Islam Not affiliated	129.13	176.07	0.001
	Others- Not affiliated	96.77	153.38	0.001

In terms of religion the most frequent religion that shows some statically significant differences from other religions is Islam. Those that indicated that they were of the Islam faith had a higher mean in all cases, except for the risk of not being able to communicate with local people. Christians are in second place in terms of having some differences with other groups. Those of Jewish affiliation appear to be associated with higher levels of risk perception for not liking the food and the risk that local people will not be friendly, which fits with the stereotypical image of Jews.

Table 8-14 Kruskal-Wallises for destination risk perception and travelling as a single person, with family or with friends:

Types of risks	Are you generally travel:	Mean ranking	Chi-square	Asympt.sig
The risk of being involved in a natural disaster	Alone Family Friends	308.29 369.28 371.22	12.290	0.002
The risk of not getting good value for money	Alone Family Friends	396.42 351.05 330.72	10.749	0.005
The risk that the local population might not be friendly	Alone Family Friends	331.30 351.98 384.42	7.098	0.029
The risk that my code of dress and behaviour will not be received well by locals	Alone Family Friends	319.09 359.30 375.05	7.629	0.029
The risk of not being able to communicate with local people	Alone Family Friends	322.24 362.69 369.25	6.152	0.046

Table 8-15 the *post hoc* test (Mann U Whitney) for destination risk perception and travelling as a single person, with family or with friends

Types of risks	Are you generally travel:	Mean ranking	Chi-square	Asympt.sig
The risk of being involve with natural disaster	Alone-Friends	168.84	202.54	0.006
The risk of not getting good value for money	Alone-Friends	206.48	170.86	0.0024
The risk that local population might not be friendly	Alone-Friends	170.68	198.42	0.027
The risk that my code of dress and behaviour will not be received well by locals	Alone-Friends	168.29	196.69	0.025

Table 8-15 shows that there are differences between those who travel alone and people who travel with friends. People who travel with friends tended to have higher levels of ranking to the risks in the above table with the exception of not getting good value for money.

Table 8-16 Mann- Whitney U test for destination risk perception and whether travellers have been involved in risky situations

	Mean Ranking				
Types of risks	Yes	No	MUW	z	P<0.05
The risk of getting food poising is:	395.39	333.65	40899.000	-3.799	0.000
The risk of crime	374.37	342.45	45497.500	-1.980	0.048
The risk that my travel will be disrupted because of industrial action/strikes	388.58	336.31	42240.500	-3.227	0.001

Generally people who had been involved in risky situations prior to the questionnaire tended to show more concern about all kinds of risks. Perhaps this is because experience is a more important explanatory factor than other factors in the demographics of respondents.

Table 8-17 Mann- Whitney U test for destination risk perception and if a relative has been involved in a risky situation

	Mean Ranking				
Types of risks	Yes	No	MUW	z	P<0.05
The risk of having health problems is	376.26	340.76	46942.00	-2.400	0.016
The risk of getting injured in an accident	387.72	342.56	46700.00	-2.571	0.10
The risk of crime	392.22	335.07	44573.00	-3.212	0.001
The risk of incurring unexpected expense	393.17	336.86	40792.00	-3.438	0.001
The risk that the place will be overcrowded	378.17	340.12	43324.500	-2.351	0.019
The risk that my travel will be disrupted because of industrial action/strikes	374.95	341.46	43668.000	2.045	0.041
The risk that the trip changes my own behaviour	382.35	338.63	42398	-2.634	0.008
The risk of not being able to communicate with local people	377.42	342.45	44175.500	2.102	0.036

As seen in Table 8-16, Table 8-17 shows that it is not just those who have been directly involved in risky situations who are associated with higher levels of risk perceptions, it is also those who have relatives who have been subject to risky situations. The result shows that those who have had a relative involved in an accident are more risk averse than those who have not.

8.2.2 Factor analysis

Factor analysis is a collection of methods used to examine how the underlying constuct influences the responses on a number of measured variables (Decoster,1998). Factor analysis groups variables with similar characteristics together (University of Newcastle, 2006). Field (2005) adds that to measure the characteristics the research needs to ensure that the questions that were asked do, in fact, measure the structure that was intended to be measured.

When undertaking factor analysis there are three distinct stages that can be followed:

1. First, it is important to identify and measure the inter-relationships between all of the variables being used in the analyses. This is normally achieved by building a correlation matrix which shows the correlation between each variable and each other variable being included. This results in a triangular matrix where the diagonal cells are all 1.0 showing that it is the correlation between the variable and itself. Everything else under the diagonal shows the correlation between one variable and the remaining variables.

2. Second, in order to examine the relationship of correlated variables, factors are extracted from the correlation matrix based on the correlation coefficients of the variables.

3. Third, the factors are rotated in order to maximize the relationship between the variables and some of the factors (University of Newcastle, 2006).

Field (2005) suggested that to undertake factor analysis it is necessary to ensure that the variables conform roughly to a normal distribution and that they are measured at an interval level, which the likert scale data are, although Field also goes on to suggest that that they are perhaps wrongly assumed to be such.

There are several ways of conducting factor analyses and the method chosen depends on many factors. This study has used Principal Components Analysis to reduce the data. Field (2005) believes, strictly speaking, that it is not really factor analysis;

however, the two procedures may often yield similar results (Afshinia 2005; Field 2005). Principal Components Analysis is conceptually less complex than factor analysis. It bears numerous similarities to discriminate analysis and is a psychometrically sound procedure. According to Stevens (1992), with 30 or more variables and communalities greater than 0.7 for all variables, different solutions are unlikely, but with fewer than 20 variables and any low commonalties (<0.4) differences can occur. However, none of these conditions apply to the current data set. Looking at the correlation matrix (see Appendix 2), the pattern of relationships between the variables can be seen. The highest correlation observed between any two of the variables is 0.677 (the risk of terrorism and political unrest). The significance values (1-tailed) associated with the correlations show that the highest level of significance between any 2 variables is .043 (risk of poor weather and political unrest, which is presumably spurious unless it can be shown that countries that have an image of political unrest are also in climatic regions where weather conditions are uncertain). Therefore, there are no variables that are significantly correlated and the determinant of the matrix was found to be 0.001 which is greater than the necessary threshold value of 0.00001.

There does not seem to be a problem of excessive multicollinearity within the data set. To conclude, all 20 destination risk perception questions in the analyses correlate reasonably well and none of the correlation coefficients is significantly large. Therefore, there is no need to consider eliminating variables at this stage (Field 2005).

The dataset was then subjected to the Kaiser-Meyer-Olkin measure of sampling adequacy and Bartlett's test of sphericity. According to Field (2005), the KMO statistic produces values between 0 and 1. If a value of zero is achieved this suggests that the sum of partial correlations is relatively large compared with the sum of the correlations. This identifies whether there is diffusion in the pattern of correlations. If this is found to be the case, then one could argue that factor analysis is an inappropriate tool to use (see table 8-18). Intermediate values such as those around 0.5 to 0.7 and above can be thought of as being in the range of *satisfactory to good*, and this position continues to increase as values approach 1.0 (Kaiser, 1974 in Field, 2005). The dataset used in this study produces a value which is close to one (0.922)

demonstrating that the pattern of the correlations is relatively dense and so factor analyses can be considered an appropriate technique(Field 2005).

Table 8-18 KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.922
Bartlett's Test of Sphericity	Approx. Chi-Square	5212.344
	Df	190
	Sig.	.0005

In order to confirm the appropriateness of factor analyses further, the Bartlett measure was used. Bartlett's measure tests the null hypothesis that the original correlation matrix is an identity matrix (a square matrix that is made up of zeros with 1's across the diagonal). There has to be some relationship for factor analysis to work and so Bartlett's measure tests have to have a measure of less than 0.5. The Bartlett's measure tests for the data show the value of 0.0005< 0.001and that suggests that it is highly significant and therefore, again, it suggests that factor analysis is suitable.

The following communalities table shows how the variables change from before to after factor extractions. Field (2005) argues that principal component analysis works on the initial assumption that all variances are common, so before the extraction the communalities are all 1. The extraction column shown in Table (8-19) reflects the common data found in the variable structure. This can be described in two ways: for example, it can be said that 52.5% of the variance associated with question one is common or shared variance or that the proportion of variance is explained by the underlying factors. The amount of variance that can be explained by the retained factor is presented by the communalities after the extractions.

Table 8-19 Communalities

	Initial	Extraction
The risk of getting food poisoning is...	1.000	.525
The risk of having health problems is..	1.000	.474
The risk of being involved in a natural disaster (eg earthquake/Storm) is...	1.000	.690
The risk of getting injured in an accident (eg car,bus,...) is...	1.000	.506
The risk of crime (theft, robbery, pick-pocket, etc) is...	1.000	.500
The risk to me by acts of terrorism is...	1.000	.656
The risk of being exposed to danger due to political unrest (civil unrest) is...	1.000	.699
The risk of not getting good value for money is...	1.000	.549
The risk of incurring unexpected expenses is...	1.000	.667
The risk of suffering as a result of credit card fraud is...	1.000	.501
The risk of experiencing poor weather is...	1.000	.602
The risk of having to put up with poor hotel accommodation is...	1.000	.494
The risk that the place will be overcrowded is...	1.000	.411
The risk that I will not like the food is...	1.000	.507
The risk that my travel will be disrupted because of possible industrial action/strikes (eg at the airport, railways, buses)is...	1.000	.500
The risk that the tourist facilities will not be acceptable (eg beach) is...	1.000	.540
The risk that the local population may not be friendly is...	1.000	.525
The risk that my trip might change my own behaviour is...	1.000	.582
The risk that my code of dress and behaviour will not be well received by the local people is...	1.000	.668
The risk of not being able to communicate with local people (language) is...	1.000	.618

Extraction Method: Principal Component Analysis.

Table 8-20 shows the component matrix before rotation. This matrix contains the loading of each variable onto each factor. By default, SPSS displays all loading. However, it has been requested that all loading less than 0.4 be suppressed in the output so there are blank spaces for many of the loadings.

Table 8-20 Component Matrix (a)

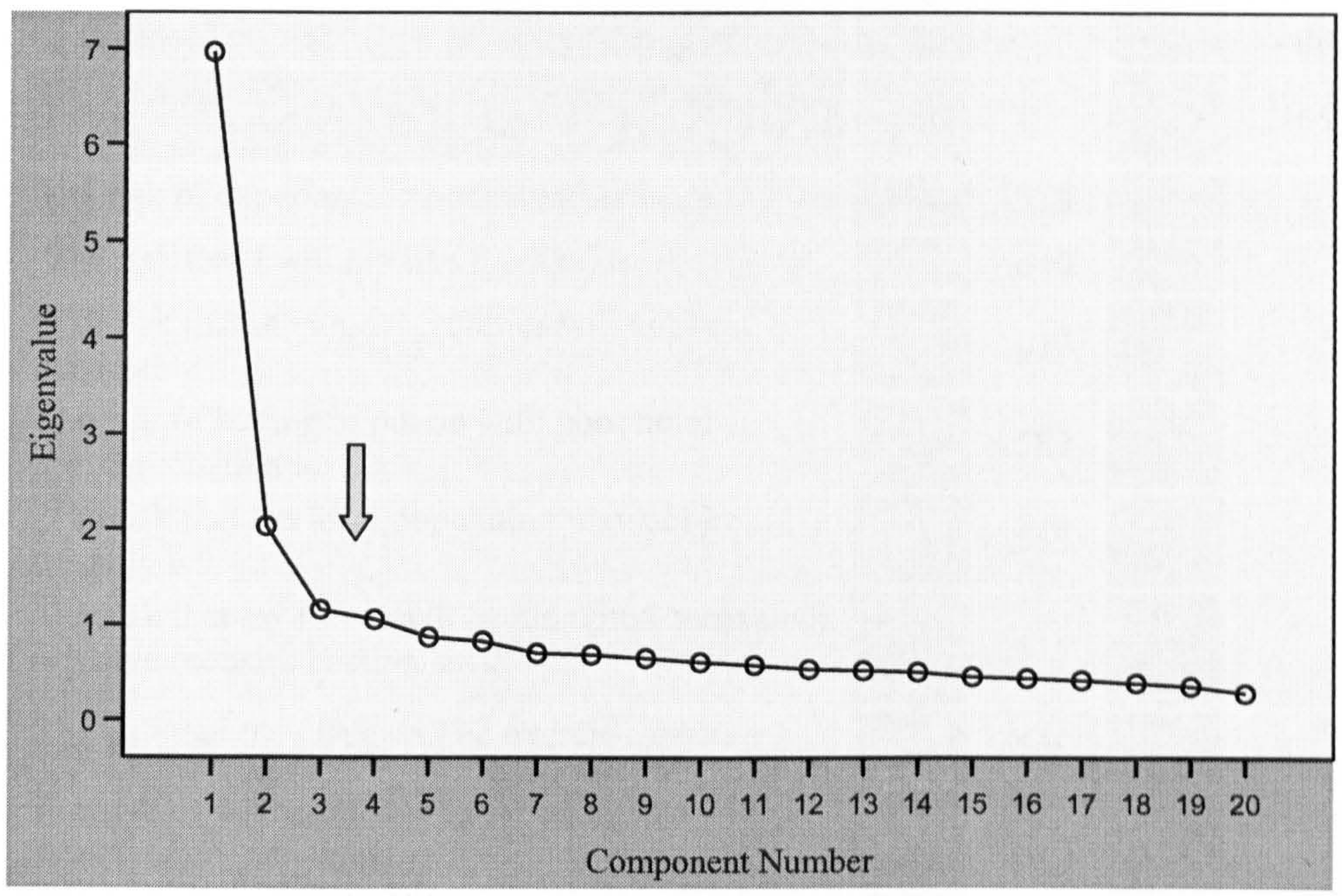
	Component			
	1	2	3	4
The risk of being exposed to danger due to political unrest (civil unrest) is...	.679	-.477		
The risk that the tourist facilities will not be acceptable (eg beach) is...	.666			
The risk that the local population may not be friendly is...	.654			
The risk that my code of dress and behaviour will not be well received by the local people is...	.637		-.477	
The risk of getting injured in an accident (eg car,bus,...) is...	.633			
The risk that my travel will be disrupted because of possible industrial action/strikes (eg at the airport,railways,buses)is...	.631			
The risk of crime (theft, robbery, pickpocket) is...	.630			
The risk of suffering as a result of credit card fraud is...	.628			
The risk of being involved in a natural disaster (eg earthquake/Storm) is...	.625	-.527		
The risk to me by acts of terrorism is...	.612	-.430		
The risk of having to put up with poor hotel accommodation is...	.604			
The risk of having health problems is..	.593			
The risk of getting food poisoning is...	.587			
The risk that the place will be overcrowded is...	.543			
The risk that my trip might change my own behaviour is...	.541			.445
The risk of incurring unexpected expenses is...	.539		.416	
The risk that I will not like the food is...	.532			
The risk of experiencing poor weather is...	.420	.548		
The risk of not getting good value for money is...	.457	.470		
The risk of not being able to communicate with local people (language) is...	.519			.536

Extraction Method: Principal Component Analysis.
a 4 components extracted.

However, with the Kaiser-Meyer-Olkin measure of sampling adequacy, the data needs to extract four factors (retaining all factors with eigenvalues greater than 1). But Jolliffe (1972, 1986 in field 2005) reports that the Kaiser criterion is too strict and suggests a third of option of retaining all factors with eigenvalues more than .7. The difference between how many factors are retained using Kaiser's methods compared to Jolliffe can be significant. Research has indicated that the Kaiser criterion is accurate when the number of factors is less than 30 and communalities

after extraction are more than 0.7 or, if the sample size is less 250, when the average communalities is greater than 0.6. In cases where none of the above apply it has been suggested that the use of a scree plot could be helpful (see Figure 8-1). The scree plot is a graph based on the eigenvalues associated with each component factor. The graph is useful for determining how many factors to retain in the analyses, the point of interest being where the curve starts to flatten out.

Figure 8-1 Scree Plot



The arrow on the graph shows the point of inflexion on the curve. The curve is difficult to interpret because it starts to tail off after the three factors, hence it is probably safe to go with three factors.

The rotated component matrix (a) in table 8-21 shows the questions that load onto the same factor. However, the table contains the same information as table 10-20 but is calculated after the rotation.

Table 8-21 Rotated Component Matrix[a]

Type of risk	Component			
	1	2	3	4
The risk of being involved in a natural disaster	.801			
The risk of being exposed to danger due to political unrest(civil unrest) is...	.787			
The risk to me by acts of terrorism is...	.747			
The risk of getting food poisoning is...	.670			
The risk of getting injured in an accident (eg car, bus,...) is...	.617			
The risk of having health problems is..	.599			
The risk of crime	.534			.408
The risk of suffering as a result of credit card fraud is...	.466			.465
The risk of experiencing poor weather is...		.719		
The risk that I will not like the food is...		.640		
The risk that the tourist facilities will not be acceptable		.617		
The risk of having to put up with poor hotel accommodation is...		.589		
The risk that the local population may not be friendly is...		.557		
The risk that my travel will be disrupted because of possible industrial action/strikes	.428	.555		
The risk that the place will be overcrowded is...		.548		
The risk of not being able to communicate with local people (language) is...			.726	
The risk that my trip might change my own behaviour is...			.704	
The risk that my code of dress and behaviour will not be well received by the local people is...			.650	
The risk of incurring unexpected expenses is...				.751
The risk of not getting good value for money is				.636

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.
a Rotation converged in 8 iterations.

Comparing this matrix with the unrotated matrix in table 8-20 shows that before rotation there were more variables loaded highly into factor one and the remaining factors were not significant. However, the rotation matrix has clarified the situation and more were loaded into 3 factors. Field recommended the suppression of loading lower than 0.4 in order to focus on only those that are significant and then to order

variables by loading size (this is done here) which makes the interpretation considerably easier because there is no need to scan the matrix to identify substantive loadings.

The questions that are highly loaded into factor one all seem to relate to **physical risk.** The questions that are highly loaded into the second factor all seem to relate to **performance risk** and those loading into the third factor mostly have questions in relation to the **socio cultural** aspects of risk. Finally, the financial aspects of risk are highly related to factor 4. There are two aspects of risk (crime related to money) despite being highly related to physical risk are also related to factor four, the financial aspect of risk (highlighted). And industrial disruption seems mostly related to performance risk.

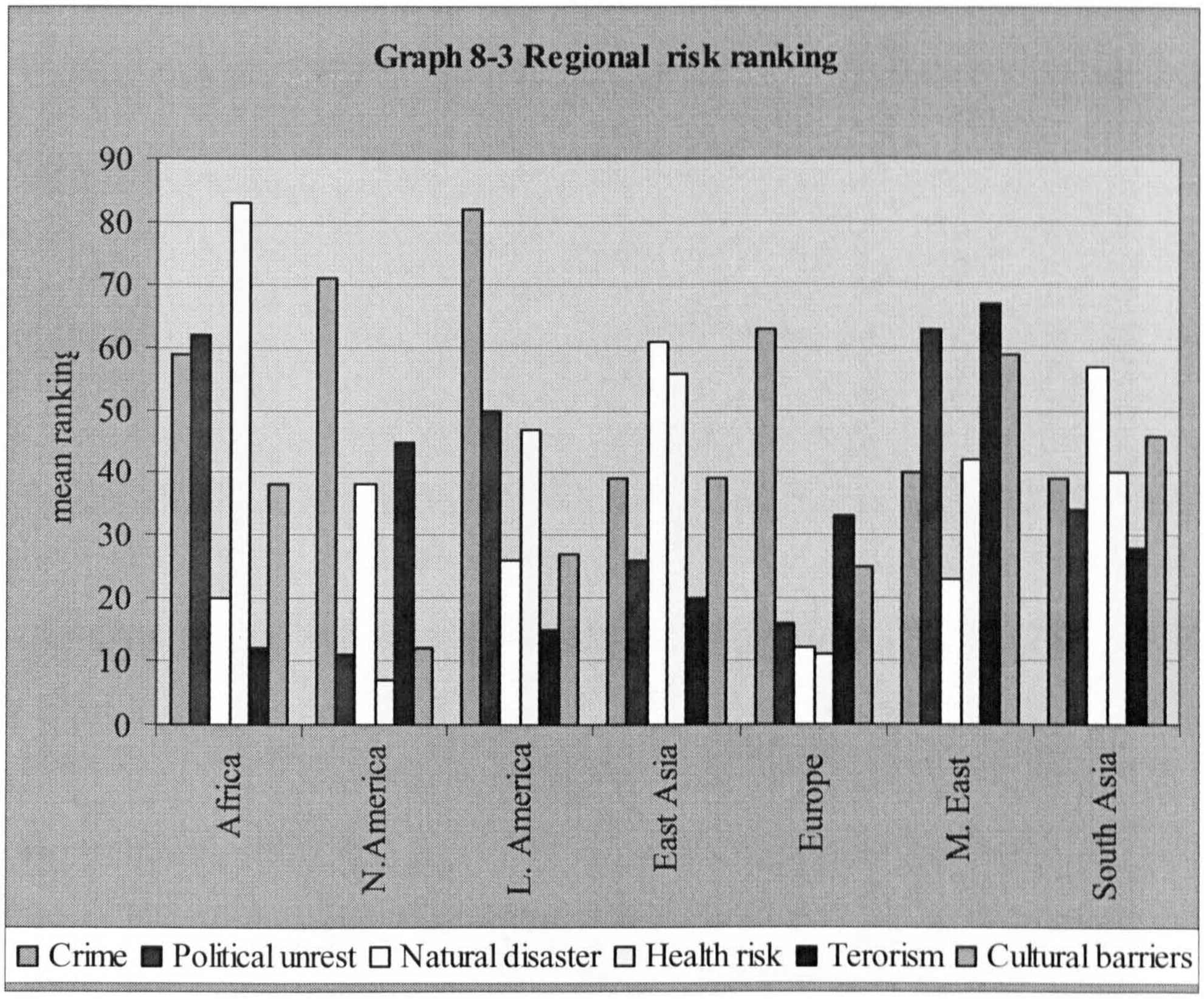
These analyses reveal that there are initially three distinct aspects of risk. However, the analysis has also shown that the risk of credit card fraud loaded higher into physical risk than financial risks and this may be considered unexpected.

8.2.3 Regions and risk

The first step undertaken was to build an index of people's risk perceptions on the basis of the mean of 6 questions that measure overall destination perception risk for each of 7 regions. A Cronbach's alpha test was employed to ensure the reliability of the index for overall risk perceptions. The Cronbach's alpha test, over all risk questions, was 0.809 and it should be noted that deleting one of the questions did not significantly improve the alpha score.

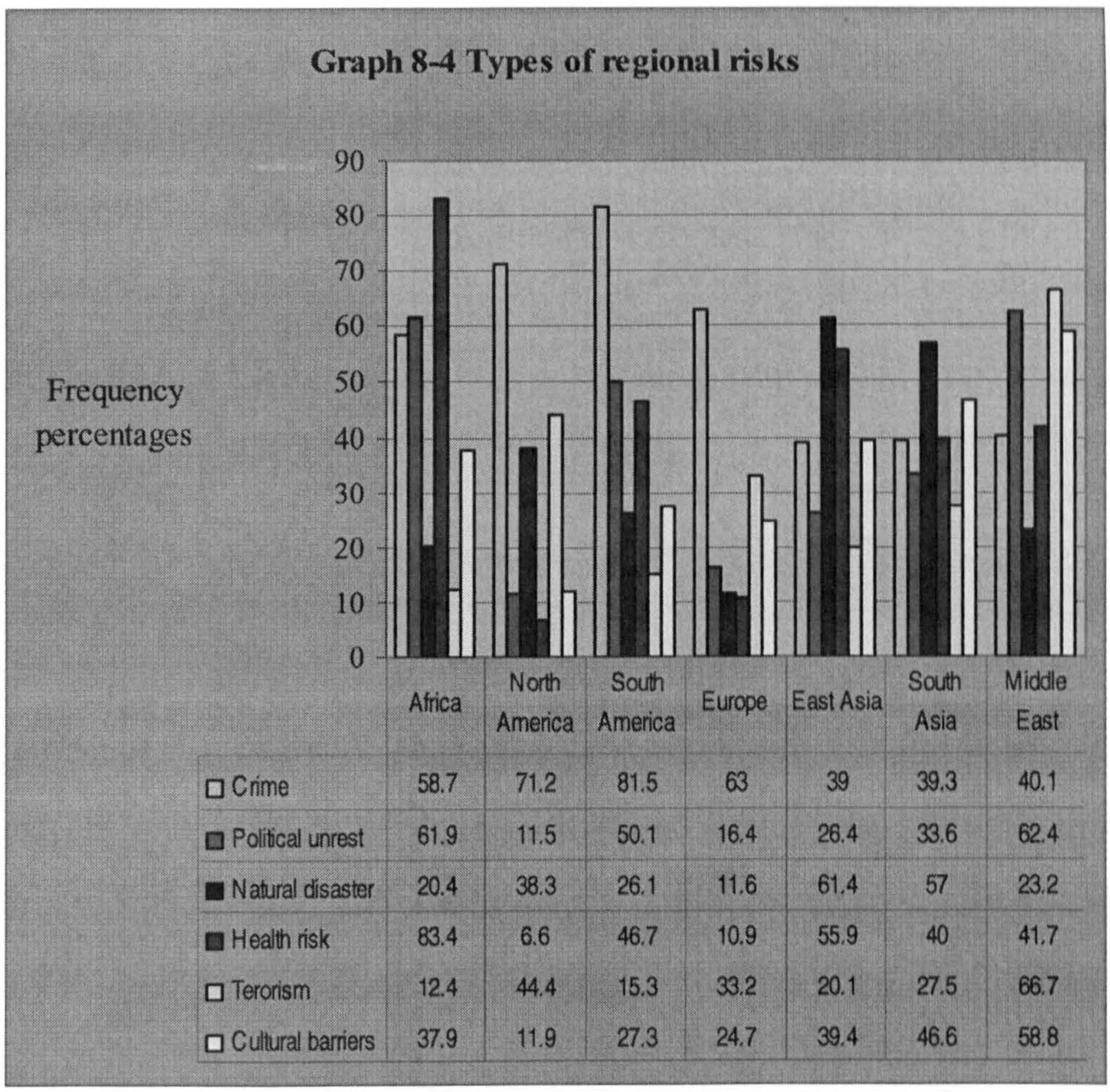
Table 8-22 Item-Total Statistics

	Mean ranking	Cronbach's Alpha if Item Deleted
Africa crime	.59	.804
Africa political unrest	.62	.803
Africa natural disaster	.20	.806
Africa health risk	.83	.806
Africa terrorism	.12	.806
Africa cultural barriers	.38	.801
North America crime	.71	.806
North America political unrest	.11	.811
North America natural disaster	.38	.805
North America health risk	.07	.811
North America terrorism	.45	.806
North America cultural barriers	.12	.812
Latin America crime	.82	.806
Latin America political unrest	.50	.806
Latin America natural disaster	.26	.802
Latin America health risk	.47	.803
Latin America terrorism	.15	.804
Latin America cultural barriers	.27	.805
East Asia and Pacific crime	.39	.804
East Asia and Pacific political unrest	.26	.803
East Asia and Pacific natural disaster	.61	.807
East Asia and Pacific health risk	.56	.807
East Asia and Pacific terrorism	.20	.804
East Asia and Pacific cultural barriers	.39	.806
Europe crime	.63	.807
Europe political unrest	.16	.810
Europe natural disaster	.12	.810
Europe health risk	.11	.810
Europe terrorism	.33	.804
Europe cultural barriers	.25	.811
Middle East crime	.40	.802
Middle East political unrest	.63	.805
Middle East natural disaster	.23	.807
Middle East health risks	.42	.804
Middle East terrorism	.67	.804
Middle East cultural barriers	.59	.801
South Asia crime	.39	.801
South Asia political unrest	.34	.801
South Asia natural disaster	.57	.805
South Asia health risk	.40	.813
South Asia terrorism	.28	.806
South Asia cultural barriers	.46	.802



The results (summarised in Graph 8-3) indicate that while there is evidence that people are more concerned in terms of health risk in Africa, it can also been seen that risk of crime has a higher mean ranking in Latin America. The Middle East shows the highest mean of ranking in terms of three risks; terrorism; political unrest and cultural barriers.

Following on from developing an index on the basis of the overall risk, it is useful to construct a second index that just utilises the frequency of risks in each region. In this way, the higher perceptions of risk can be compared with the mean, to look for any significant differences. The results are shown in Graph 8-4 and in the majority of cases the rankings are highly similar to those derived when using the mean measurement. Both results show that crime has the highest mean while it also has the highest frequency answer and the risk of terrorism took third place followed by health risks. In other words, people, in general, seem to be more concerned about crime or health risks relative to any other form of risk.



	Africa	North America	South America	Europe	East Asia	South Asia	Middle East
Crime	58.7	71.2	81.5	63	39	39.3	40.1
Political unrest	61.9	11.5	50.1	16.4	26.4	33.6	62.4
Natural disaster	20.4	38.3	26.1	11.6	61.4	57	23.2
Health risk	83.4	6.6	46.7	10.9	55.9	40	41.7
Terorism	12.4	44.4	15.3	33.2	20.1	27.5	66.7
Cultural barriers	37.9	11.9	27.3	24.7	39.4	46.6	58.8

8.2.4 The relationship between a region's perceived risks and the region of origin

Kruskal Wallis shows that there are many significant differences among the variables relating to the risks associated with a region and the region of origin of the respondent. However, it does not, on its own, say which means are significantly different from which other ones (see table 8-23),therefore the Mann U Whitney test has been undertaken(see table 8-24).

Table 8-23 Kruskal Wallis between regions' perceived risks and region of origin

Regions type of risks	Region of origin	Mean ranking	Chi-square	Asympt.sig
Africa crime	Africa(1)	369.69	19.038	002
	N.America(2)	373.77		
	L.America(3)	145.00		
	Europe(4)	369.69		
	Asia(5)	348.35		
	M. East (6)	368.84		
Africa political unrest	Africa(1)	357.00	46.407	0005
	N.America(2)	459.27		
	L.America(3)	132.00		
	Europe(4)	379.37		
	Asia(5)	302.91		
	M. East (6)	308.60		
Africa health risk	Africa	329.50	20.521	001
	N. America	386.77		
	L. America	359.50		
	Europe	361.85		
	Asia	390.41		
	M. East	290.44		
Africa cultural barriers	Africa	355.31	13.799	017
	N. America	351.23		
	L. America	220.50		
	Europe	369.40		
	Asia	354.86		
	M. East	308.68		
North America crime	Africa	371.00	22.755	0003
	N. America	362.82		
	L. America	133.73		
	Europe	365.31		
	Asia	351.91		
	M. East	372.70		
North America political unrest	Africa	456.00	20.821	0008
	N. America	321.00		
	L. America	353.73		
	Europe	351.78		
	Asia	386.45		
	M. East	395.72		
North America natural disaster	Africa	400.50	17.951	0030
	N. America	384.14		
	L. America	384.14		
	Europe	368.38		
	Asia	293.23		
	M. East	390.31		
Latin America political unrest	Africa	328.29	25.604	0001
	N. America	499.59		
	L. America	205.21		
	Europe	369.45		
	Asia	315.16		

	M. East	323.48		
Latin America natural disaster	Africa	365.14	21.029	0008
	N. America	328.00		
	L. America	292.79		
	Europe	373.26		
	Asia	307.23		
	M. East	316.96		
Latin America health risk	Africa	289.64	21.166	0007
	N. America	480.00		
	L. America	187.50		
	Europe	366.58		
	Asia	342.29		
	M.East	322.41		
East and pacific natural disaster	Africa	342.50	28.353	0005
	N. America	243.50		
	L. America	177.50		
	Europe	259.15		
	Asia	171.81		
	M. East	255.54		
Europe crime	Africa	383.29	25.804	0005
	N. America	420.27		
	L. America	164.60		
	Europe	367.44		
	Asia	303.29		
	M. east	361.77		
Europe natural disaster	Africa	317.50	22.341	0004
	N. America	317.50		
	L. America	353.20		
	Europe	351.41		
	Asia	405.83		
	M. East	344.96		
Europe health risk	Africa	370.50	11.787	038
	N. America	319.50		
	L. America	319.50		
	Europe	352.74		
	Asia	389.43		
	M. east	360.69		
Europe cultural barriers	Africa	370.50	16.898	0046
	N. America	300.95		
	L. America	518.40		
	Europe	350.27		
	Asia	386.27		
	M. East	357.75		
Middle east political unrest	Africa	230.93	26.609	0005
	N. America	421.82		
	L. America	258.86		
	Europe	374.39		
	Asia	328.08		
	M. East	284.08		

Middle east health risk	Africa	206.50	27.021	0005
	N. America	336.68		
	L. America	239.05		
	Europe	376.18		
	Asia	324.60		
	M. East	287.56		
Middle east terrorism	Africa	270.64	18.401	0024
	N. America	442.91		
	L. America	410.32		
	Europe	368.88		
	Asia	331.36		
	M. East	292.87		
Middle east cultural barriers	Africa	299.64	14.064	015
	N. America	374.14		
	L. America	276.36		
	Europe	369.65		
	Asia	350.86		
	M. East	288.05		
South Asia natural disaster	Africa	406.07	35.843	0005
	N. America	378.14		
	L. America	312.95		
	Europe	377.23		
	Asia	263.40		
	M. East	349.93		
South Asia cultural barriers	Africa	244.21	14.841	011
	N. America	388.55		
	L. America	323.36		
	Europe	372.25		
	Asia	313.72		
	M. East	323.99		

a adjusted<0.0033

Table 8-24 The *post hoc* test (Mann U Whitney) for the destination risk perception and region of origin:

	Region of origin	Mean ranking		Asympt.sig
Africa Crime	Africa –Latin America	14.25	8	002
	N. America - L. America	15.82	8.50	001
	L. America - Europe	110.00	278.00	0005
	L. America - Asia	28.00	59.39	0002
	L. America - M. East	16.50	36.74	0001
	Europe - Asia	320.38	305.10	0005
Africa Political unrest	Africa –Latin America	14.25	08.00	0020
	N. America - L. America	17.45	7.00	0005
	L. America - Europe	90.50	279.12	0005
	L. America - Asia	32.50	58.85	0017
	L. America - M. East	29.41	33.14	0018
Africa health risk	Europe - Middle East	300.76	242.25	0003
	Asia - Middle East	83.86	62.75	0005
N. America crime	N. America - L. America	15.00	08.00	0030
	L. America - Europe	101.95	278.54	0005
	L. America - Asia	25.50	58.83	0005
	L. America - M. east	14.91	36.15	0005
North America natural disaster	Europe - Asia	329.33	262.84	0005
	Asia - Middle East	69.35	89.85	0005
L. America political unrest	N. America - L. America	16.95.	7.46	0001
	L. America - Europe	150.71	276.26	0016
	N. America - M. East	45.59	29.78	00.30
L .America health risk	N. America - L. America	16.91	07.50	0005
	L. America - Europe	140.00	277.01	0006
L .America natural disaster	Europe - Asia	325.46	267.09	0001
Europe crime	N. America - L. America	14.59	07.05	0013
	L. America - Europe	120.80	276.35	0001
	L. America - M. East	17.10	34.27	0013
	Europe - Asia	325.15	268.21	0006
Europe cultural	L. America - Europe	400.45	271.65	0005
Europe natural disaster	Europe - Asia	310.11	358.43	0005

East Asia and Pacific natural disaster	Europe - Asia Asia - Middle East	232.73 41.74	154.40 57.81	0005 001
South Asia natural disaster	Europe - Asia	334.06	233.09	0005
South Asia cultural barriers	Europe - Asia	326.50	274.58	0029
Middle East political unrest	Europe - Middle East	302.68	228.24	0002
Middle East health risk	Europe - Middle East	302.56	229.41	0005
Middle East terrorism	Europe - Middle East	301.62	238.96	0015
Middle East cultural barriers	Europe - Middle East	301.53	234.39	001

a adjusted <0033

The results of the *post hoc* tests show that, the most frequent statistical difference is between people from Latin America and other regions, in all cases except one. The respondents from Latin America have given lower rankings whilst Europeans gave higher rankings than the rest of the regions. Furthermore, there is no statistically significant difference between the way Europeans ranked risks in the Middle East and the way all other regions were ranked. Where there were considerable differences was between the way that European travellers and those from the Middle East ranked risk when travelling to destinations in the Middle East. Not surprisingly, there is a statistically significant difference between Asians and others in terms of the risk of natural disasters while the mean overall ranking by Asians is lower than the rest.

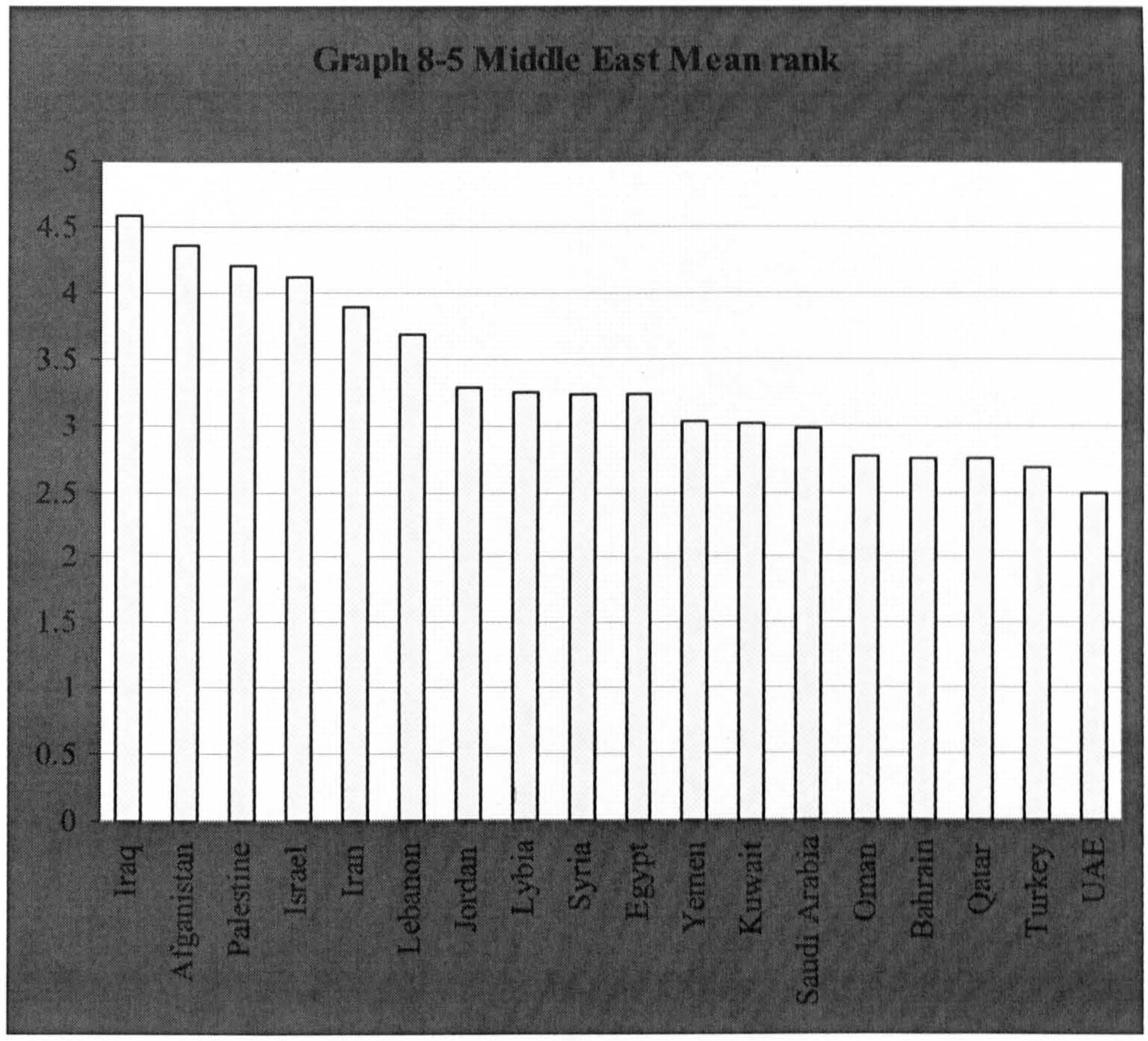
8.3 Middle East

Routine tests were undertaken for the Middle East and some selected countries to examine the mean ranking and to identify the top countries that ranked highly in relation to the rest of the countries in the Middle East. Secondly, an index was created that just utilises the frequency of risks in each country and this derived a similar result to the rankings.

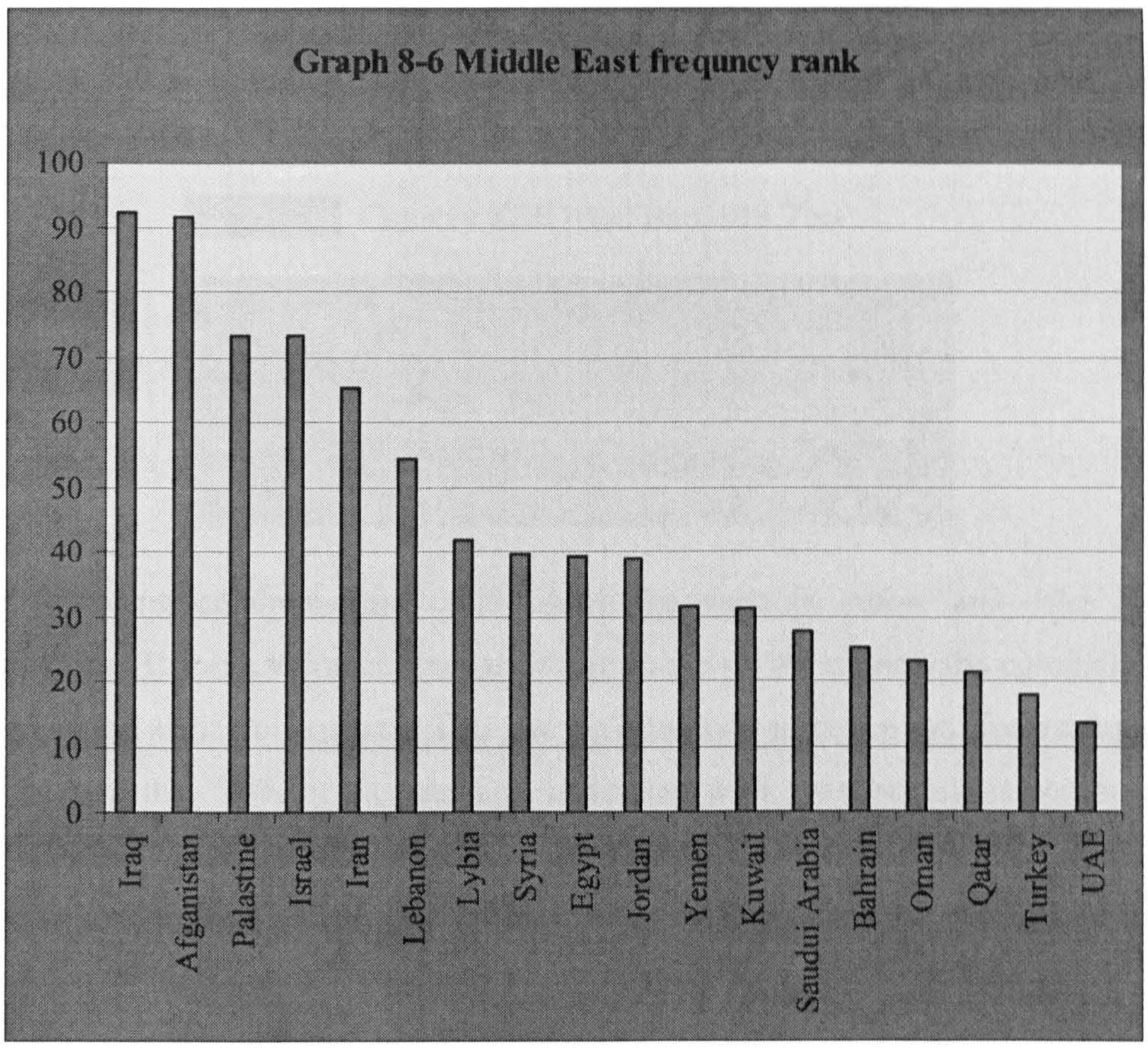
Table 8-25 Country mean risk rankings and Alpha test

Countries	Mean ranking	Cronbach's Alpha if Item Deleted
Afghanistan	4.36	.907
Bahrain	2.75	.905
Egypt	3.23	.903
Iran	3.89	.902
Iraq	4.58	.905
Israel	4.11	.909
Jordan	3.28	.899
Kuwait	3.01	.897
Lebanon	3.69	.903
Libya	3.26	.897
Oman	2.77	.901
Palestine	4.2	.907
Qatar	2.75	.901
Saudi Arabia	2.97	.900
Syrian Arab Republic	3.24	.898
Turkey	2.68	.905
UAE	2.49	.902
Yemen	3.03	.901

The data in Table 8-25 shows the mean ranking (significant as demonstrated by the alpha score) and this is then transformed into Graph 8-5 showing that Iraq scored the highest level of risk perception with a mean value of 4.58, and Afghanistan was second with a mean value of 4.36 and so on. These results are not particularly surprising.



The percentage of respondents who identified countries such as Iraq as having either a 4 or 5 risk value is shown in Graph 8-26. It can be seen that more than 90 per cent of all respondents found that both Iraq and Afghanistan were rated 4 or 5 in terms of their travel-risk perceptions.



8.3.1 Factor analysis for the countries

The correlation matrix based on countries, included as appendix 3, demonstrates the pattern of relationships between them in terms of risk. The R matrix (or correlation matrix) shows that the highest correlation between any 2 countries is 0.649 (between Oman and Qatar). The significance values (1-tailed) associated with the correlations show that the highest level of significance between any 2 countries is .317 (between the Emirates and Afghanistan). Therefore there are no countries that are significantly correlated and the determinant of matrix was found to be 0.000825 which is greater than the necessary threshold value of 0.00001.

The dataset used in this study, when subjected to the Kaiser-Meyer-Olkin measure of sampling adequacy and Bartlett's test of sphericity, produces a value which is close to one (0.900), demonstrating that the pattern of the correlations is relatively dense and so factor analysis can be considered an appropriate technique (Field 2005). The

Bartlett's measure tests for the data shows the value of 0.0005< 0.001 and that suggests that it is highly significant and therefore, again, it suggests that factor analysis is suitable.

Table 8-26 Country KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.900
Bartlett's Test of Sphericity	Approx. Chi-Square	2314.487
	df	153
	Sig.	.0005

The following communalities table shows the variable before and after factor extractions. The extraction column shown in Table (8-26) reflects the common data found in the variable structure. This can be described in two ways: for example, it can be said that 5.9% of the variance associated with question one is common or shared variance or that the proportion of variance is explained by the underlying factors. The amount of variance is that can be explained by the retained factor is presented by the communalities after the extractions.

Table 8-27 Communalities

	Initial	Extraction
Afghanistan	1.000	.592
Bahrain	1.000	.675
Egypt	1.000	.408
Iran	1.000	.457
Iraq	1.000	.699
Israel	1.000	.447
Jordan	1.000	.668
Kuwait	1.000	.715
Lebanon	1.000	.522
Libya	1.000	.662
Oman	1.000	.597
Palestine	1.000	.623
Qatar	1.000	.727
Saudi Arabia	1.000	.584
Syrian Arab Republic	1.000	.672
Turkey	1.000	.371
UAE	1.000	.614
Yemen	1.000	.681

Extraction Method: Principal Component Analysis.

The arrow on the scatter graph shows the point of inflexion on the curve (graph 8-2). The curve starts to flatten out after the third factor. It could also be argued that the fourth factor has an eigenvalue, which is less than one, and, given that the sample size is relatively large, it is probably safe to assume the Kaiser criterion.

Figure 8-2 Scree Plot

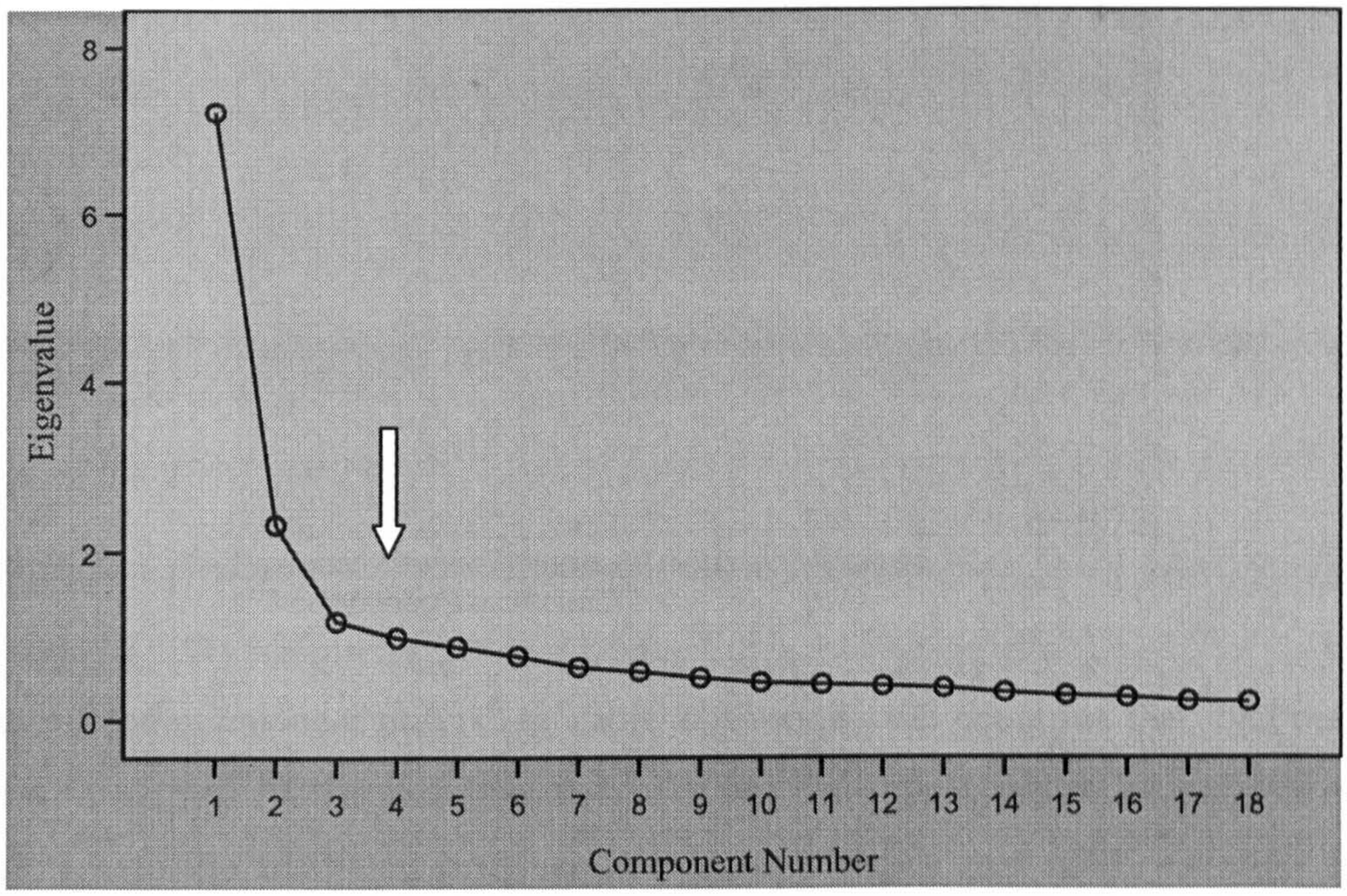


Table 8-29 shows the component matrix before rotation. This matrix contains the loading of each country onto each factor. By default, SPSS displays all loading. However, it has been requested that all loading less than 0.4 be suppressed in the output and so there are blank spaces for many of the loadings.

Table 8-28 Country Component Matrix [a]

	Component		
	1	2	3
Libya	.804		
Kuwait	.799		
Syrian Arab Republic	.765		
Jordan	.735		
Saudi Arabia	.715		
Oman	.709		
Qatar	.693	-.411	
Yemen	.663		-.489
UAE	.658	-.426	
Iran	.646		
Lebanon	.598	.404	
Egypt	.578		
Bahrain	.576	-.444	
Turkey	.526		
Palestine	.439	.655	
Iraq	.477	.642	
Afghanistan	.424	.642	
Israel			.421

Extraction Method: Principal Component Analysis.
a 3 components extracted.

The rotated component matrix[a] in Table 8-29 shows the countries that load onto the same factor (all factors less than 0.4 have not been displayed). Comparison of this matrix with the unrotated matrix in Table 8-28 shows that more countries in the unrotated matrix were loaded highly into factor one, and the remaining factors were not significant.. However, the rotation matrix clarifies things significantly; there are three factors and the countries loaded higher into factor one and two relatively.

Table 8-29 Rotated Component Matrix[a]

	Component		
	1	2	3
Bahrain	.814		
Qatar	.811		
Kuwait	.713		
Jordan	.702		
Oman	.644	.418	
UAE	.636	.452	
Yemen		.805	
Syrian Arab Republic		.720	
Saudi Arabia	.406	.639	
Libya	.429	.621	
Turkey		.568	
Egypt		.552	
Iran		.498	
Iraq			.825
Palestine			.752
Afghanistan			.723
Israel			.608
Lebanon			.605

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.
a Rotation converged in 6 iterations.

Looking at the countries that loaded highly into factor one, it would seem that all of them relate to having lower mean rankings (see Table 8-25). Therefore, they could perhaps be labelled as "average risk" countries. In this way, the second group can fall into a category of "higher than average" risk and finally countries in factor 3 can be labelled as "high risk" countries or "countries that I must never go to".

Following the factor analysis that ended with three main categories (or travel patterns), it may be useful to explore in more detail aspects relating to those relationships. Such as that between factor three countries (high risk countries) and the weakest relationship in factor two (Iran), to see if there are any differences in terms of travel patterns between Iran and high risk countries. This will allow us to explore if there are any differences between people of different ages or between people from different regions.

The first step was to take a Kruskal Wallis test to find out if there are any statistically significant differences between the different age groups. The result is shown in Table

8-31. It was necessary to do pair wise tests in order to find out about such differences (see Table 8-31).

Table 8-30 Test Statistics[a,b]

	Afghanistan	Iran	Israel	Lebanon	Palestine	Iraq
Chi-Square	28.657	21.103	2.193	32.483	39.562	6.254
Df	5	5	5	5	5	5
Asymp. Sig.	.000	.001	.822	.000	.000	.282

a Kruskal Wallis Test
b Grouping Variable: Age in bands

Table 8-31 The post hoc test (Mann U Whitney)[a]

Countries	Age band	Mean ranking		Asympt.sig
Lebanon	18< 18-29	161.54	207.90	0.0008
	18< 30-39	71.22	100.80	0.0001
	18< 40-39	52.97	84.03	0.0005
	18< 50-59	55.61	80.57	0.0001
	18-29 40-49	191.79	239.96	0.001
Afghanistan	18< 40-49	55.65	78.75	0.0005
	18-29 50-59	179.07	233.10	0.0005
	30-39 50-59	74.33	93.06	0.0011
Iran	18< 30-39	104.60	79.71	0.001
	30-39 40-49	80.68	103.11	0.0031

a adjusted <0033

The result mainly indicates that the only difference is between the under 18 age category and the others, where in most cases the travel decision will not be made by the respondents in this age group.

The following Tables (Table 8-32 and Table 8-33) show the results of the Kruskal Wallis tests followed by the Mann U Whitney tests.

Table 8-32 Test Statistics[a,b]

	Afghanistan	Iran	Iraq	Israel	Lebanon	Palestine
Chi-Square	8.277	54.517	9.404	4.291	12.898	13.606
df	5	5	5	5	5	5
Asymp. Sig.	.142	.000	.094	.508	.024	.018

a Kruskal Wallis Test
b Grouping Variable: Region

Table 8-33 Mann U Whitney: Regions and Iran

Country	Region	Mean ranking		Asympt.sig
Iran	Europe - Middle East	227.34	137.38	0.0005
	Asia - Middle East	81.68	55.07	0.0001
	N.America - Middle East	47.06	27.95	0.002

The results indicate that although there are no statistically significant differences between people from different regions towards the high risk countries which are included in factor three, there are some differences between Middle Eastern and North American, European and Asian people in terms of their perceptions of Iran. It could be argued that those people from the Middle East are less concerned about risks in Iran while the perceived risks in four other countries, namely Israel, Afghanistan, Palestine and Lebanon, are not significantly different from the point of view of visitors from other regions.

Conclusion

This chapter has analysed the responses to the questionnaires relating to travel-risk perceptions, exploring a variety of travel-related risks as well as the geographical location of both origin and destination of travellers. There are some significant findings, not only in terms of the rankings associated with the type of risks that are of most concern to travellers, but also in terms of the role of the country of origin in determining the perceived level of risk for specific destinations. Many of these findings support the intuitive feelings of tourism writers and researchers. For instance, the travellers who are travelling to regions that have an image of risk with

respect to physical harm, such as the Middle East, are much more concerned about this risk if they come from, say, Europe than they are if they come from the Middle East. Also of interest is the relatively low ranking that the questionnaire respondents gave to the risk of being caught up in acts of terrorism, placing it as the 11th concern and well behind the risk of crime, incurring unexpected expenses and not being able to communicate with the local people. This perhaps flies in the face of the media reports relating to travel-risk which in recent times have tended to focus on acts of terrorism. These findings will be compared with the views of the global tourism experts used in the Delphi Exercise reported in the next chapter.

Given the importance of the risk of crime to the traveller, a further exploration was made to look at whether travellers' perceptions about the countries that are high-risk in terms of crime are reflecting the actuality of incidents of crime against travellers. Again, it would seem that the image or stereo type of destinations does more to colour the view of travellers than the actual events. The top three destinations in terms of perceived crime as identified by the travellers were the USA, Italy and Spain whereas, according to data acquired from a major insurance company, the top three destinations in terms of actual crime-related claims were the Czech Republic, Thailand and Switzerland(See chapter 9).

Chapter 9

Delphi survey

Introduction

Having undertaken the questionnaire survey targeting a wide range of travellers and tourists, it was felt that a mini-Delphi study could provide a useful instrument to either confirm or refute the information provided by the questionnaire respondents. The Delphi Exercise can also add to the knowledge base by exploring aspects of risk in relation to specific destinations and in terms of the ways that the current risk positions may be altered to improve the future prospects of tourism development.

The mini-Delphi study enlisted the support of 49 internationally-respected tourism experts. The exercise involved three rounds of iteration where the first round replicated the questionnaire that was given to the survey respondents together with a summary of the survey findings. Panel members were also asked to provide comments on each aspect that was covered in the original questionnaire so that they could provide their views. The second round of the exercise provided the panel members with a synthesis of the first round results and invited them to change their views in the lights of those responses. It then added 2 further questions to explore in more detail the regional aspects of risks and types of risks that are associated with each specific region.

The third round again replicated the questionnaire questions and provided the second round responses, inviting the panel members again to reconsider their viewpoints. But then it had a more substantial element that explored the situation in the Middle East and selected countries in greater depth and also focused upon the situation with respect to Iran and possible ways of alleviating some of the difficulties experienced in developing tourism in that country.

The initial email that went out to the list of potential Delphi Panel members was sent to 49 international tourism specialists. The original target was to enlist the support of 38 Panel Members, knowing that there would be an attrition rate and that the study would probably finish its third and final round with around 20 panel members. Selection of the panel members was on the grounds of their writing and research experience, interests in tourism development and their knowledge of tourism in general and, in some cases, their knowledge of the Middle East in particular. Of the

49 academics selected, 36 agreed to take part and of the 36 who agreed to take part there were 28 experts from quite disparate geographical locations (USA and Canada to Australia, New Zealand and Hong Kong, Israel; UAE, Turkey and Europe) who actually responded in the first round.

In measuring consensus, criteria vary from study to study, the frequency distribution is often used to assess the level of agreement (McKenna 1994) and the criterion of a majority, at least 51% responding to any given response, is often used to determine consensus (McKenna 1994). However, others such as Aker et al. (2003) argued that the level of consensus should be 75% within their study. Some also undertake Inter-quartile ranges to determine how much consensus there is. Using this approach, the level of consensus is measured by taking the difference between the values recorded at the 25th and 75th percentiles. If the value of that difference is 1 or less then it can be assumed that a consensus has been achieved. However, there is no consensus in the literature in terms of how to use Interquartile, some suggesting values greater than 1 as being an acceptable threshold to determine consensus (Raskin 1994). This study uses non-parametric data and this, together with the nature and variety of choices facing respondents makes such an approach inappropriate. Because the types of options that respondents are presented with vary from binary choices to questions with 7 options, it was felt that a frequency measure would fit best and the threshold of consensus was set at 70% of all panellists, for each question.

9.1 The Delphi rounds

The first round of the Delphi gave the respondents a two-page summary of the findings from the questionnaire survey and included 19 of the questions that were included in the original survey, relating to travel risk perceptions. The questionnaire was distributed by email and panellists were asked to respond within 10 working days of receiving it. The questionnaires kept their Likert scale and binary format but included an option that allowed the respondents to explain their responses if they so wished. This allowed the respondents to expand on their views rather than simply be confined to a simple yes or no as in the case of the binary questions, or scoring 1 to 5 in the case of the Likert Scale questions.

For the second round of Delphi, a summary of the responses (expressed as percentages in terms of the distribution of answers) that were made during the first round was provided for the panel members. They were asked to look at the distribution of responses that were made for each question and consider whether or not they would like to reconsider their responses as there still were some divergences of opinion. They were also asked 2 new questions concerning travel risk at the regional level. Of the 28 respondents to the first round of the exercise, 25 completed and returned the second-round questionnaire. One of the members indicated that they would not be able to participate in the last round due to unforeseen circumstances and another two who did not respond were both based in the Middle East. By the end of round two a consensus was found to exist for 8 of the 19 questions that had been sent during the first and second round. Therefore these 8 questions were eliminated from the third round of the exercise.

Round three served as the final round for the study. Summary statistics using frequency percentages of the responses from the preceding round, showing their own responses to each question, together with a summary of responses from the rest of the panel were reported to each panel member. Because of consensus found on the 8 questions in round two, only 15 questions were submitted in round three for members to evaluate, including 2 new questions regarding travel risk in the Middle East and Iran. This third instrument was sent to the 25 panel members who responded in round two. Twenty three individuals responded to this third round, yielding an overall response rate of 82%. Frequency, percentage and ranking were used to evaluate the third round.

9.2 Delphi findings

In response to the questions relating to the individual traveller, there was indication of a consensus that some travellers are more risk-averse than others. More than 74% of the panel members suggested that the innate travel-risk averseness of the traveller was an important factor when making their travel decisions. This result, although slightly decreasing during the second round, increased to 79% in the final round. According to the panellists, the risk of physical harm was by far the most significant risk area that concerned travellers, then in second place came financial risk, whereas satisfaction

with the tourist destination choice was felt to be least the important area of risk. The consensus with respect to the ranking of these risks increased from 71.4% in the first round to 80% in the second round and finally to more than 80% in the final round. However, the strong consensus was only achieved with respect to the panellists' views regarding physical risk. The other two areas were only subject to a majority decision rather than a consensus. The frequency of risk-related events occurring also featured in the responses made by panellists, with comments such as:

> *I think that financial risk is more likely to occur and, thus, tourists are more concerned about this (17).*

The vast majority of panellists in the first round (88%) felt that physical, financial and destination satisfaction would vary according to the region of the world in which the destination was located. This majority was consolidated in the second round with a consensus of more than 90% in agreement. These findings appear to be in line with hypothesis 4 that those travel-related risks are a major determinant of the travel decisions made by tourists.

The specific destination to which travellers were going was deemed even more important in determining the level of travel-risk perception, with a majority of 96% of panel members indicating that this was important or very important. This level of agreement was maintained in the second round. The fact that the destination is important in forming risk perceptions is further reinforced by the fact that more than 80% of panellists in the first round and more than 90% in the second round felt that not only was the specific destination important as an influence, but even the region in which the destination was located is an important influence. This suggests that the perceptions of travel risk are painted with quite a broad brush and a destination can be subjected to higher levels of travel-risk perceptions by association, even though the specific destination may have low actual risk levels. This suggests that there is a strong perceptual relationship between the different regions of the world and the type of travel-related risk, which helps to form people's perceptions. This may be important in making travel decisions if some regions are stereotyped as exposing travellers to certain types of risk.

Moreover, almost the same percentage (92% in the first round and 96% in the second round) said that people feel more at risk if they travel outside their normal region of residence. This was a point that was noted when analysing the difference between Middle East travellers going to destinations within the Middle East as opposed to travellers from outside the region. This does not mean, however, that travellers from outside a region are not exposed to more risk than travellers within the region! It can be considered as being similar to the phrase *"just because you are paranoid does not mean that everyone is out to get you!"*. However, some mentioned that it depends on where the tourists go (panellists 26,25,18), some also pointed to the fact that they thought the Middle East was a risky place to go and others suggested that a lack of familiarity has both positive and negative effects on travel-risk perceptions and decisions (17,16,12,3,6,10,18).

> *An individual's risk averseness is important as it will affect where he/she chooses to go on holiday, when and where. This is because travel decisions are reliant on the individual imagining what it will be like, what kind of holiday experience they will have. Obviously past experience, friends, media etc will influence their imagined experience but ultimately the decision is based on the fit between the person's comfort zone and the holiday they think they will get. (15)*

> *Risk is about control, the extent to which someone wants or needs to have control over what happens to them. Package holidays are highly controlled, and more likely to attract people who are risk averse. Independent travel across different countries, cultures, transport networks, language and time zones is less controllable by the individual and more likely to appeal to people who accept a degree of uncertainty (risk) in what they do. (15)*

> *Risk awareness is partly subjective (depending upon the age, education levels etc of the individual) and partly objective (in that it depends upon the amount and accuracy of the information available). It is true, therefore, that to many travellers risk is far less important than to many other people. (2)*

The comments that were made with respect to the innate travel risk averseness of individuals, the level of travel experience of individuals, or the risk-perceptions associated with different regions were quite varied. However, there was some agreement about the role of the media in highlighting risks and recent events in some regions of the world. This was a point mentioned by several panel members (27, 23, 15, 3, 5, 22 and 2) and that travellers from developed countries with open media are more likely to know and understand the risks involved in travel to destinations (16)

and the *foreign-ness* of travellers to the destinations for which they are bound (25,15 and 5). There is clearly some overlap between this latter element and the innate travel-risk averseness of individuals and it was noted by several panel members that some cultures may be more likely to be more travel risk averse than others (25,16,10,15,27,21 and 2). Some anecdotal evidence mentioned by panel members included:

> *Cultures are different and they most likely incorporate different perceptions of risk. Also depending upon origin (and associated personal attributes) people will feel different degrees of risk pertaining to different destinations.* (25)

While many believed that Americans are highly risk averse (21, 27, 15), another panellist said (2):

> *It might be an issue of propaganda. In the United States, for instance, the government publishes a travel-warning page, which it updates periodically. This includes places where apparent dangers really do exist, but it also includes countries that are probably safe to visit, but because they are seen as 'enemies' or adversaries, they are placed on the list.*

> *Americans more risk averse and also geographically challenged so they are often unable to distinguish different destinations (For Americans they are all 'foreign') (21).*

> *Believe that travellers' tolerance of risk is partly conditioned by the degree of each type of risk that they live with at home Eg Dos Palmas resort in the Palawan Islands of Southern Philippines which experienced a dreadful terrorist attack in 2001 experienced a change in visitor mix from Europeans to Asians and particularly South Koreans following the attack. (16)*

> *Risk awareness is also dependent on how often – how familiar the person is with travelling to a certain place. Before going to a "new" place people are more likely to be worried (if the information about the place is negative). If they have a good experience there, they are more likely to be more positive the next time round. (21)*

The age, gender, culture and occupation of travellers may influence their level of travel-risk averseness. In a similar way, the country of origin can be seen as a composite factor that reflects culture. The response to the question "do you think the country from which the traveller originates is an important influence on their level of travel-risk averseness" showed that a majority of panellists (68%) suggested that it

does have a strong influence. One of the panellists referred to the categorisation of cultures by Hofstede (2001) that was discussed in the literature review:

> *Yes, definitely. The categorisation of cultures by Hofstede also helps us on this subject. To me, people from the eastern world are less risk aversive while those from the western society are more. (18)*

Some also argue that geopolitical circumstances affect their country's relationships with other countries and regions of the world and this can influence the level of risk averseness (3, 16, 15). Along the same train of thought, travellers from countries subject to threats of terrorist attacks are likely to be more averse to visiting those countries that make the threats. In the final round 86% of respondents suggested that the country of origin is important or very important and the result had not changed from the second to the third round.

There seems to be a high positive correlation between the panel's view about the traveller's age and increases in risk averseness right from the very first round. While some suggested that:

> *Older people are more concerned about physical risk, perhaps caused by unexpected illness or trauma, while this is less of an issue for younger people. Younger people are more concerned about financial risk, while older, more experienced individuals are more worldly and, therefore, less likely to be subjected to financial risk. (5)*

It could also be argued that older people may have had more travel experience and that experience may be influencing them rather than their absolute age. These findings support the views that came out of the questionnaire survey, namely that older people (mainly over 50) are less concerned about financial risk. These findings are in line with other studies that suggested young people were 'high risk travelers' because of their age and 'naivety' [inexperience] (Jones et al .,2006). In other words, a lack of awareness leads to a lack of averseness.

Looking further into the demographics of travellers and how they may impact on their level of risk averseness, there was some feeling amongst panel members that females are more sensitive to travel-related risk [especially personal safety] (25, 12, 5) than their male counterparts and again this tended to support the results of the

questionnaire survey findings (chapter 8). However, some emphasised that gender alone is not a factor that influences attitudes to risk and that:

> *Gender alone does not determine levels of risk averseness. Gender combined with the lifecycle stage of the individual is very important. (15)*

In this regard, the consensus developed suggesting that males are neutrally risk averse increasing from 67% in the first round, through 75% in the second round and finally to 76% in the final round. Panellists were equally agreed that females are perceived to be highly risk averse with more than 78% of panellists supporting this view in the final round, having grown from 71% of panellists in the first round. It seems that the earlier findings from the questionnaire survey are supported in the Delphi and that both support hypothesis 3 that travel related risk perceptions are influenced by the demographics of the traveller.

The majority of panellists (80%) believed that previous experience is very important in determining the level of risk averseness, while some believe that the purpose of travel can influence attitudes, with leisure (discretionary) tourists being more susceptible to changing their travel decisions. In addition, leisure tourists may operate according to the following mode:

> *Negative experience = nasty taste = to be avoided in future. (12)*

The findings of the questionnaire survey demonstrated that there was a significant difference between people who had experienced, directly themselves or indirectly through a relative, a risky situation when travelling, and those who had not. The latter group was seen to be less risk averse than the former. One of the panellists mentioned that risk averseness is related to awareness, previous experience and knowledge. Again, it is difficult to control for this variable in isolation. However, as mentioned earlier, the findings of the questionnaire survey show that there is a statistically significant difference between people who have been exposed to negative experiences (themselves or one of their relatives) and their level of risk averseness. The importance of previous experience in determining the level of risk averseness received a 96% level of agreement in the second round. The findings of the questionnaire survey also (see Table 8-16 and 8-17, chapter 8) suggested that people

who either themselves or whose relatives have been involved in risky situations previously tend to show more concern about all kinds of risks. This result is consistent with the findings of Floye et al. (2003) when they suggested that travel experience is the most significant predictor of travel intentions and that past experience might dominate one's perception of risk (Pinhey and Inverson 1994; Sonmez and Graefe 1998). These findings may suggest that hypothesis 3, that the previous experience of the tourists is more important in determining travel related risk perceptions than any other factor, is true.

The comments made with respect to the influence of education suggest that the majority believe that education does have an influence on the level of risk averseness. Many (27, 26, 25, 21,15), suggest that the differences between education levels are based on the premise that the more educated people are, the more aware and knowledgeable of travel risks they become. However, others have suggested that this relationship could work counter to this and that the more educated people are, the less risk averse they become, perhaps because of the confidence given by their better knowledge. It is difficult to isolate these factors as one would expect a high degree of correlation between age, income, education, occupation and previous travel experience. In which case, any one or combination of these factors could be the causal factor for influencing travel risk averseness. In the final round of the Delphi, more than 95% of panellists agreed that education is a very important or important factor.

Although the majority of panel members felt that the occupation of travellers would influence their level of risk averseness, less than 50% of panel members rated this at either the 4 or 5 level of influence (very important or important). The panel members' responses to this aspect were coloured by statements such as:

If an individual is risk averse in their everyday life then they are more likely to be risk averse when travelling for example if someone is self employed (which may be seen as a 'risky' option by someone else) then they may be less risk averse when travelling. How much 'risk' is involved in someone's day-to-day job is a factor for example trading on the stock market with other people's money is a 'risky' business, which may again affect travel decisions relative to risk. There will always be exceptions though, for example the person who has a mundane job but decides to go bungee jumping! (15)

The final round of the Delphi was not able to produce a consensus that occupation was an important influence on travel-risk perceptions, with only 65% of panellists feeling that this was the case. The questionnaire survey was also not able to show significant differences between people's travel-risk perceptions and their occupation.

The question relating to the religious affiliation of the traveller brought out some interesting issues. The results of the questionnaire survey showed that the most significant differences were between Muslim people and the rest. Many of the panellists in the Delphi study also pointed to the same conclusion, arguing that since 9/11 the world's view toward Islam has changed and Muslims feel that they are at more risk in non-Muslim countries (12, 3). It was also suggested that Jews may feel more vulnerable and hence more risk averse when going to Islamic countries for the same reasons. Some see the differences in religion in the same way as differences in culture (religion being a sub-set of culture) and so travellers may feel less comfortable the more "alien" the religious beliefs are to their own. Overall, a consensus amongst panel members was not reached during the first round, showing that 35.7% ranked religious affiliation as being a neutral factor whilst the same percentage sees it as having a strong influence on travel-risk perceptions.

According to one of the respondents:

> *Some Christians may be intimidated by the cultural differences involved in travelling to Islamic countries for a variety of reasons, which may affect their travel. I recently went to Iran which caused a great deal of consternation among friends and family. Partly it was because of the exoticism and strangeness of going to a fundamentalist Islamic country. Yet, in reality, Iran is quite an easy place to visit with very friendly people. (5)*

And another panellist pointed out that:

> *Fatalism is part of some religions and cultures (22)*

Which is likely to lessen the level of travel-risk averseness as the fate of the traveller was in the hands of a higher power. In the final round 75% of panellists suggested that travel risk averseness is not driven by people's religious affiliation.

In the first round of the Delphi, the majority of panellists suggested that people are more travel risk averse if they travel with their family members rather than when they alone. In support of this view, some panel members suggested that it depends on who they were travelling with and the majority felt that travelling with family, especially with young children, means being more risk averse (27, 25, 22, 21, 19, 18, 16 13, 3 ,5, 6, 7, 15,10). By the third round of the Delphi, the panel was evenly divided between those that felt who people are more risk averse when travelling alone (50%) and those who suggested that people are less risk averse when travelling alone (50%).

A key issue to be addressed when trying to understand travel decisions with respect to travel-related risk, is the relationship between perceived and actual risk. Whereas the morals of persuading travellers that an area is less risky than it actually is may be called into question, there could be a major shortfall in realising the potential of tourism if people hold a perceived risk of travel that is much greater than the actual reality. In the first round of the Delphi, panel members generally felt that there was no strong correlation between perceived travel risk and actual risk in many instances (travel to Iran being quoted as an example of how out of synchronisation these may be). However, others felt that there may be a correlation in terms of real and perceived risk with respect to health risks (19). Overall, it was felt that perceived risk was likely to be higher than actual risk (19, 16, 6, 15, 3, 4, 5) for most travellers.

It is important to mention here that the role of the media and the travel advisory desk and insurance companies is of paramount importance. As the perception of risk could also be related to the fact that travel insurance companies could refuse to insure a traveller to a certain destination.

The media de-mystifies risk, risk becomes personalised. The media turns it from unknown to known and thus more likely, even if statistically someone is very unlikely to be the victim of crime or terrorism whilst travelling. The important factor is not what is, but what is perceived to be (15).

In terms of the media, any look at Mexico would suggest people shouldn't travel there, even if a risky situation is located in only one small region. Likewise, people tend to be shocked to learn that there is still tourism going on in places like Iraq and Afghanistan, albeit limited in region and scope (3).

It doesn't matter what the real risk is, if I feel a destination is risky, then I will be more cautious than if I feel a place is not risky, even though the real risk may be higher. The earlier example of travel to Iran is a case in point.

It is perceived as an incredibly risky destination for most Westerners, yet my experience was just the opposite (5).

In the third round of the Delphi the majority of panellists (60%) suggested that there is no correlation between the actual and perceived levels of travel related risk, while one of the panellists noted that:

I agree with the even-split level of the answer given that perceptions do not necessarily translate into reality. These perceptions must be accompanied by situational factors which transform perceptions into actuality... Some regional countries, for instance, in Africa and Asia, are more risk-prone to visit than in others. The situation might be explained in part by political tension and in part also by religious differences, perhaps reinforced by differences in cultural outlook (24).

Although limited in scope, the results of comparing perceived risks (Table 9-1) with actual risks, as identified by insurance company 'claims data', indicate that there is no correlation between the two. A view shared by more than half of the experts in the Delphi exercise. It seems, from this evidence, that there is some justification in rejecting the null hypothesis 7, that travel related risk perceptions are highly correlated with actual travel related risks.

Table 9- 1 Top three countries: Actual vs Perceived Risk

Types of risks	Countries Perceived	Countries Actual
The risk of having health problems is..	India China Thailand	Egypt Caribbean USA
The risk of crime (theft, robbery, and pickpocket) is...	USA Italy Spain	Czech republic Thailand Switzerland

In terms of the longitudinal aspects of risk perception, the panel members were asked if there was a perception that travel is riskier now than it was 10 years ago. The initial view from panel members was that the level of travel-related risk had not changed much over the past ten years. Some pointed out that over this period they felt that the health risk had declined in importance whilst the terrorist threat had increased (25).

After 9/11 and all the following terrorism incidents the risk associated with travel has changed completely. Before, the travel risk was more of targeting specific individuals and small scale. Nowadays 9/11 et al however are activities targeting general public who were unlucky to be in the wrong place at the wrong time.

Many of these activities are not locality specific but more likely to be "one group against another group of people", i.e. Islamists against the whole world. Bali, Madrid, Israel and Palestine, Africa, N. America, UK: the geographic pattern or boundary isn't clear but the political pattern is quite obvious (12).

Some suggested that the actual level of risk has not changed but that the perceived level of risk has changed (increased) and some see the media as being responsible for this increase (5, 22, 10)

> *The level of risk of travel really hasn't changed over time. The only thing that has changed is that the American media (which means the global mass media) has picked on fear as the dominant theme of its media coverage in the last six years. There are as many terrorist attacks now against tourists as there were 30 years ago. There are as many natural catastrophes that affect tourists as there were 30 years ago. As many tourists are being victimized by crime and swindles as 30 years ago (5, 22, 10).*

The final result from the Delphi study was that rather than staying fairly constant over the ten year period, 70% of the panel now felt that travel-related risk is higher now than it was previously.

More than 80% of panellists in the first round felt that the region in which the destination is located will affect travellers' responses. One of the panellists noted that:

> *I believe that the current political situation has created what President Bush termed as 'the axis of evil' has definitely created zones with higher perceived levels of risk. (19)*

By the time the Delphi had run its course, this view was consolidated and more than 92 % of panellists felt that the region was a significant influence on travel-risk perceptions. The agreement increased to more than 92% by the final round.

In response to the question as to whether people are more concerned about the travel risk related to acts of terrorism and political unrest rather than to other forms of risk,

more than 82% of the panellists in the first round felt that this was the case. The second round resulted in this becoming a unanimous view of the panel, suggesting that the unpredictable nature of political-related activities (mainly terrorism) sends chilling signals to the tourism community as opposed to, say, natural disasters that are well-known and can sometimes be predicted with some precision (24).

On the same theme, panel members were asked to identify which of the different types of risk was the single most important. After the first round some 46% of the panellists identified terrorism as the greatest single threat with crime being regarded as the second single most important type of risk (25% of panellists). As we have seen, the panellists believe that terrorist acts are perceived as being a higher threat than natural disasters (25, 18, 17, 15, 16 and 3). They added that while natural disasters cause death, they happen rarely and may also be seen as being an *act of God,* therefore taking them out of the decision process. However, terrorism and political unrest are seen as being significant when people travel, as they tend to target civilians. Panel members again came back to the role of the media in setting the stage for risk perceptions of terrorism, adding that media coverage of terrorism and political issues is generally significantly higher (4, 5) presumably because of its "spectacular" nature. The panellists exceeded the consensus threshold level in the final round, with more than 77% of them agreeing that political risk, namely terrorism, is the greatest single risk.

Given the overwhelming level of agreement among the panel in terms of the role of terrorism in setting the stage of travel-risk perceptions, it is interesting to compare this with the questionnaire survey results where travellers ranked the risk of terrorism only in 11th place. It may be the result of the circumstances that respondents were in when there was no direct, immense threat and so the risk of terrorism has not been perceived highly. Alternatively, it may be that the public are not as influenced by the media as the panel of experts feel they are. The results from the Delphi and the questionnaire survey are not supportive of each other and so it can be concluded there is not enough evidence to reject hypothesis H5, that travel related risk associated with political unrest is more significant than any other form of travel related risks as a driver of travel decisions, whilst there is also not enough evidence to confirm the hypothesis.

9.3 Regional risk

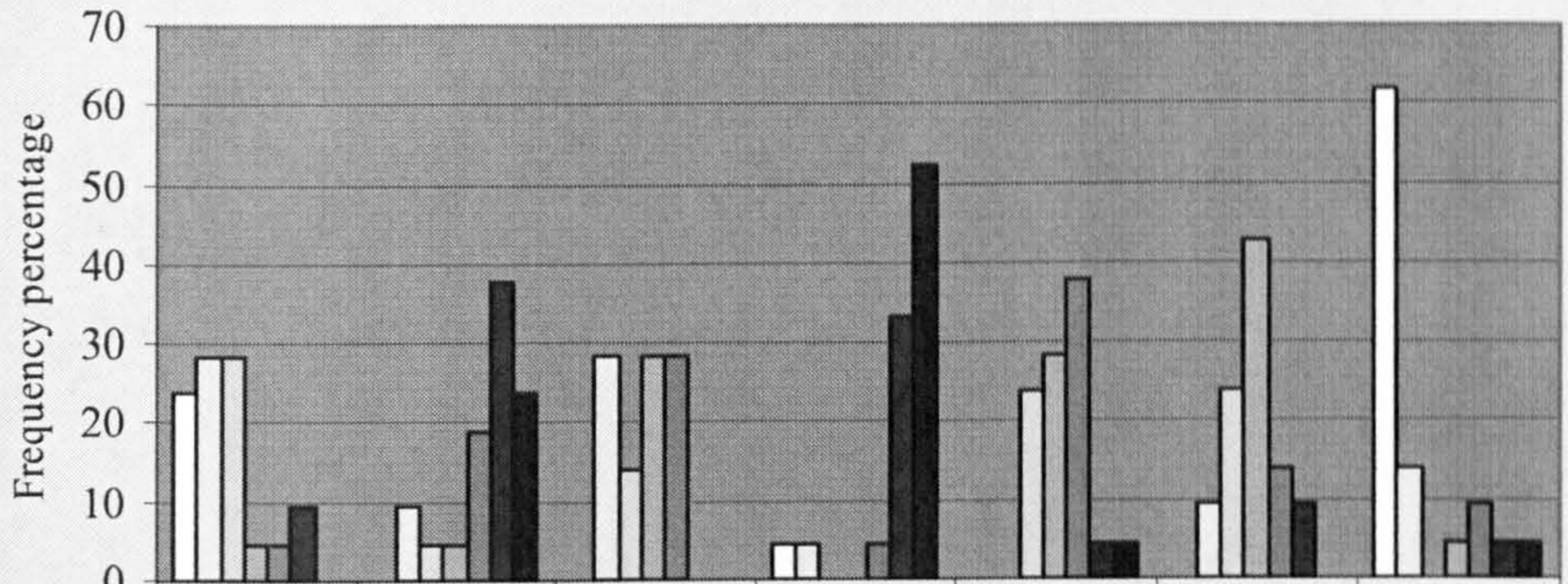
The regional results from both the questionnaire survey and the Delphi exercise are shown in Graphs 9-1 and 9-2. Both research approaches show that the majority of respondents ranked the Middle East as the region with the highest level of risk. However, to temper the results it can be noted that some respondents suggested that:

> *My choice is affected by perceived levels of terrorism, health problems and crime associated with particular regions and which may or may not have been highlighted by the media/ newspapers. (21)*

> *However, subjectivity is an issue for everyone who answers this questions ie how factors such as culture, gender etc affect perceptions of the other. Hence am I more likely to see my own 'home' region Europe as being less of a risk than those regions that are culturally very different!(15)*

Following the Middle East as the region perceived to have the highest travel-related risk, Africa was ranked second greatest risk by both the questionnaire survey and the Delphi panel. However, the Delphi panel also ranked South America at the same level of risk as Africa, whereas the survey questionnaire ranked it as third. One panellist mentioned that although crime, such as drug trafficking and militants, is quite high in South America, as a destination it is not as well known to the travellers as other regions. In both the questionnaire survey and the Delphi, Europe was considered to be the least risky region, followed by North America. However, interestingly enough, the USA ranked as the country with highest level of crime in the questionnaire survey. Some panellists felt that looking at regions was not precise enough and that individual countries should be considered *'Some risks are associated with countries' (14).* Another panellist also mentioned that 'risk and level of development are correlated'. However, some centrally governed states e.g. China are quite safe from major problems (although perhaps higher risk in terms of contaminated food) (25).

Graph 9-1 Regional risks ranking(Delphi) where 7 is the lowest perceived risk and 1 is the highest

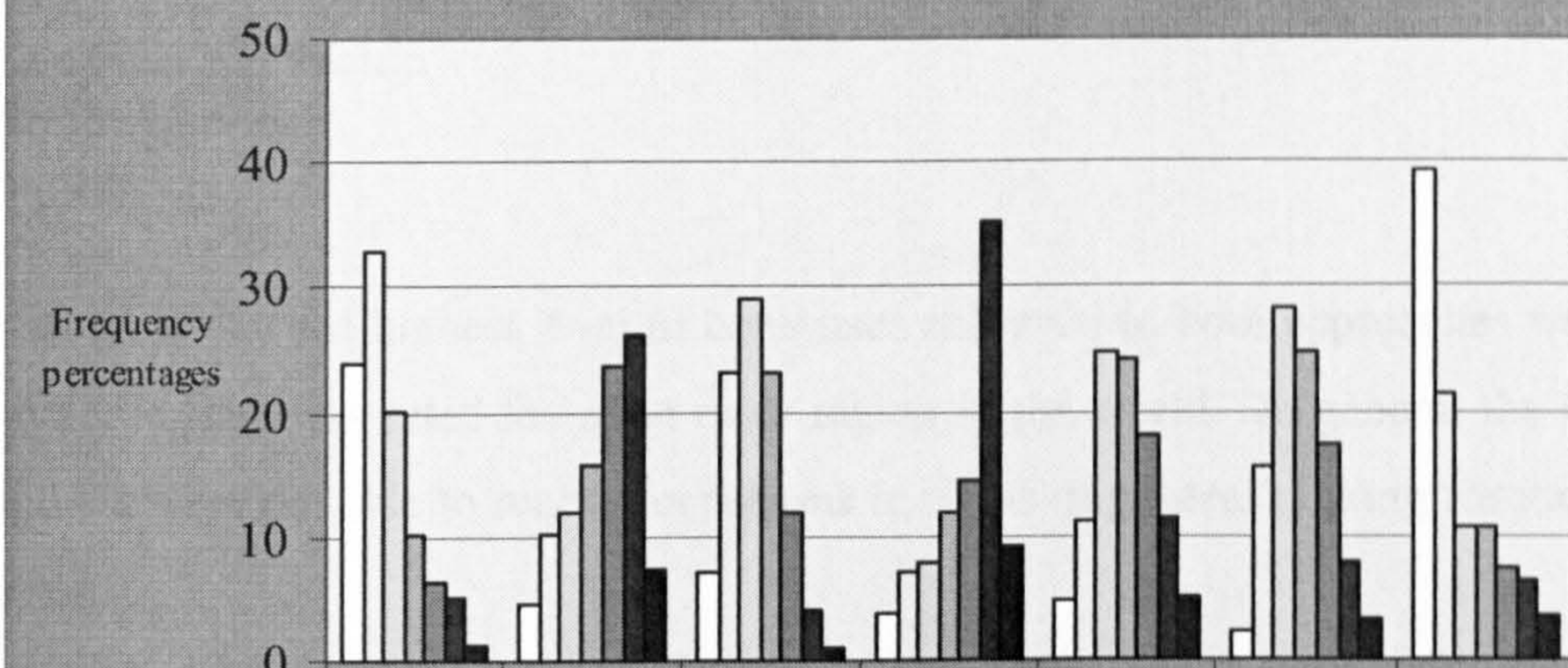


	Africa	North America	South America	Europe	East Asia and Pacific	South Asia	Middle East
□ 1	23.8	0	0	4.7	0	0	61.9
□ 2	28.5	9.5	28.5	4.7	0	9.5	14.2
□ 3	28.5	4.7	14.2	0	23.8	23.8	0
▫ 4	4.7	4.7	28.5	0	28.5	42.8	4.7
▫ 5	4.7	19	28.5	4.7	38	14.2	9.5
■ 6	9.5	38	0	33.3	4.7	9.5	4.7
■ 7	0	23.8	0	52.3	4.7	0	4.7

One of the respondent suggested that:

> *There will be no broad agreement on this issue and that there are regional variations and interpretations of the risk divide, broadly defined. Much of the debate is multi-faceted: political, religions, economic, cultural, or even seen as a clash of civilization, etc. It is a subject that evokes emotions, epitomised in the statement: "One man's meat is another man's poison". Depending on assessor's viewpoint, there will be subjective and conflicting interpretations of the situation. Certain characteristics of 'risk' are associated with certain regions. One thing is certain: We have witnessed considerable insecurity, which seems to be a global phenomenon in the new millennium.*

Graph 9-2 Regional risks ranking (questionnaire survey)



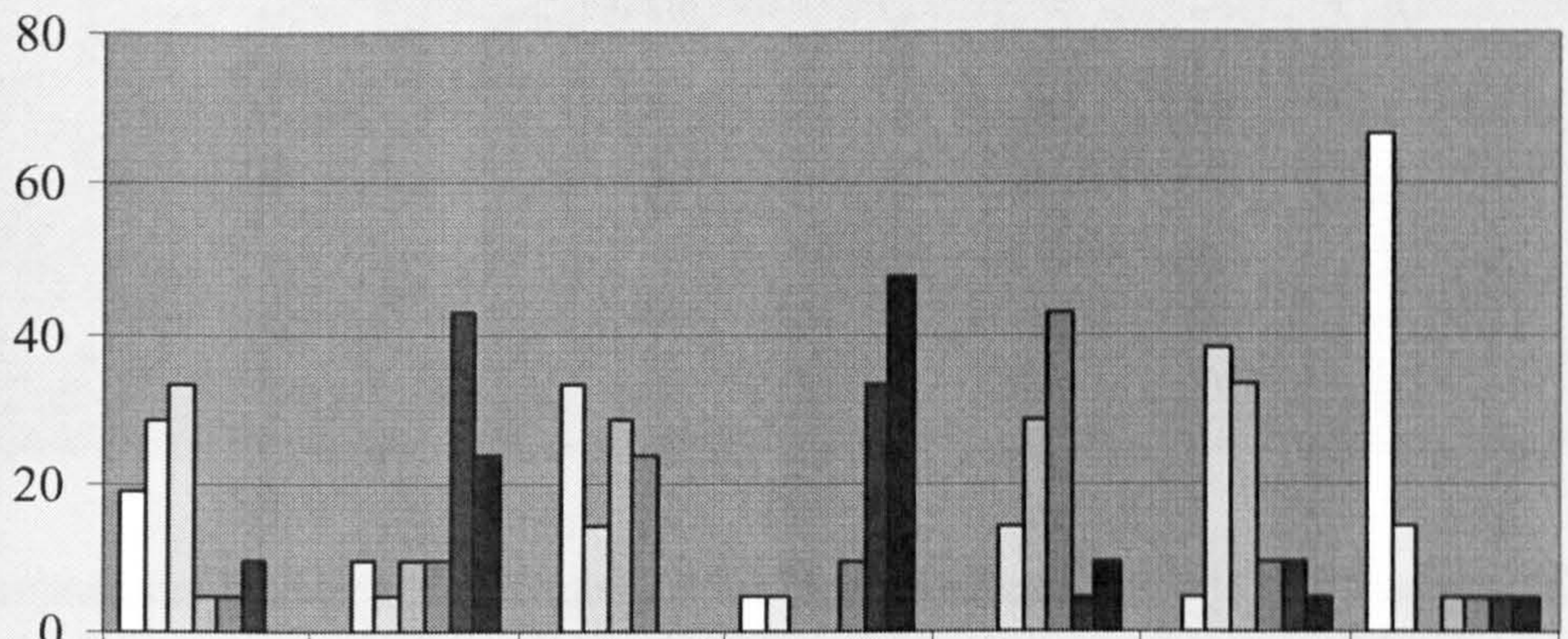
	Africa	North America	South America	Europe	East Asia and Pacific	South Asia	Middle East
□ 1	24	4.6	7.1	3.7	4.9	2.3	39.3
□ 2	33	10.2	23.2	7.1	11.3	15.5	21.5
□ 3	20.2	11.9	29.1	8	24.8	28.4	10.7
□ 4	10.1	15.7	23.3	12	24.3	24.7	10.8
□ 5	6.4	23.6	12.1	14.5	18.2	17.3	7.5
■ 6	5.1	26.4	4	35.3	11.6	8	6.5
■ 7	1.2	7.5	1.1	9.3	5	3.4	3.6

The picture painted about the travel-risk when travelling to different regions is quite clear. Graphs 9-1, 9-2 and 9-3 show that the Middle East region is perceived as having the highest risk with nearly 62% of the Delphi panel members rating it as a "1" in the sense of having the greatest level of perceived risk and a further 14.2% rating the region as a "2" the second highest perceived risk level. This result is not too dissimilar from the results from the questionnaire survey (9-3) where over 60% of respondents rated the Middle East region as either "1" or "2". Africa scores the second highest rating of perceived risk by the Delphi panel members with more than 52% of the panellists rating it "1" or "2", and this view is echoed in the questionnaire survey (9-3) with 57% of respondents giving the same responses. The overall ranking of perceived travel-risk from the questionnaire survey and Delphi exercise revealed the same result. Letting 1 be the region with highest perceived risk and 7 the region with lowest perceived risk, the order of regions was as follows:

1. Middle East
2. Africa
3. South America
3. South Asia
5. East Asia and Pacific
6. North America
7. Europe

It is notable that the highest level of consensus achieved in both approaches was that the Middle East was rated the most risky region in the world. In general the Delphi panellists were not able to reach a consensus in terms of general ranking for the other regions.

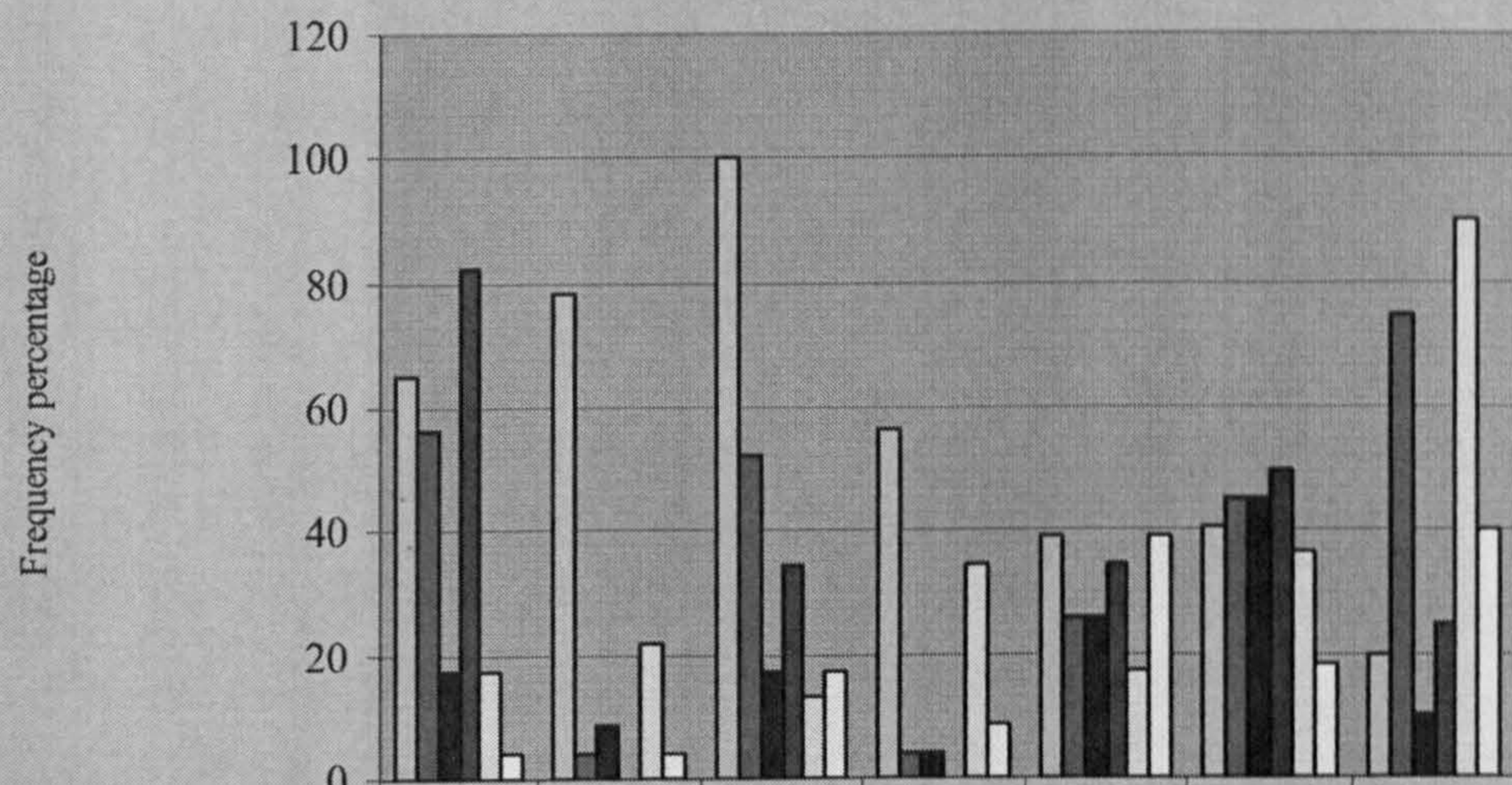
Graph 9-3 Regional risks ranking (Delphi) where 1 is the highest perceived risk and 1 is the lowest



	Africa	North America	South America	Europe	East Asia and Pacific	South Asia	Middle East
□ 1	19	0	0	4.8	0	0	66.7
□ 2	28.6	9.5	33.3	4.8	0	4.8	14.3
□ 3	33.3	4.8	14.3	0	14.3	38.1	0
■ 4	4.8	9.5	28.6	0	28.6	33.3	4.8
■ 5	4.8	9.5	23.8	9.5	42.9	9.5	4.8
■ 6	9.5	42.9	0	33.3	4.8	9.5	4.8
■ 7	0	23.8	0	47.6	9.5	4.8	4.8

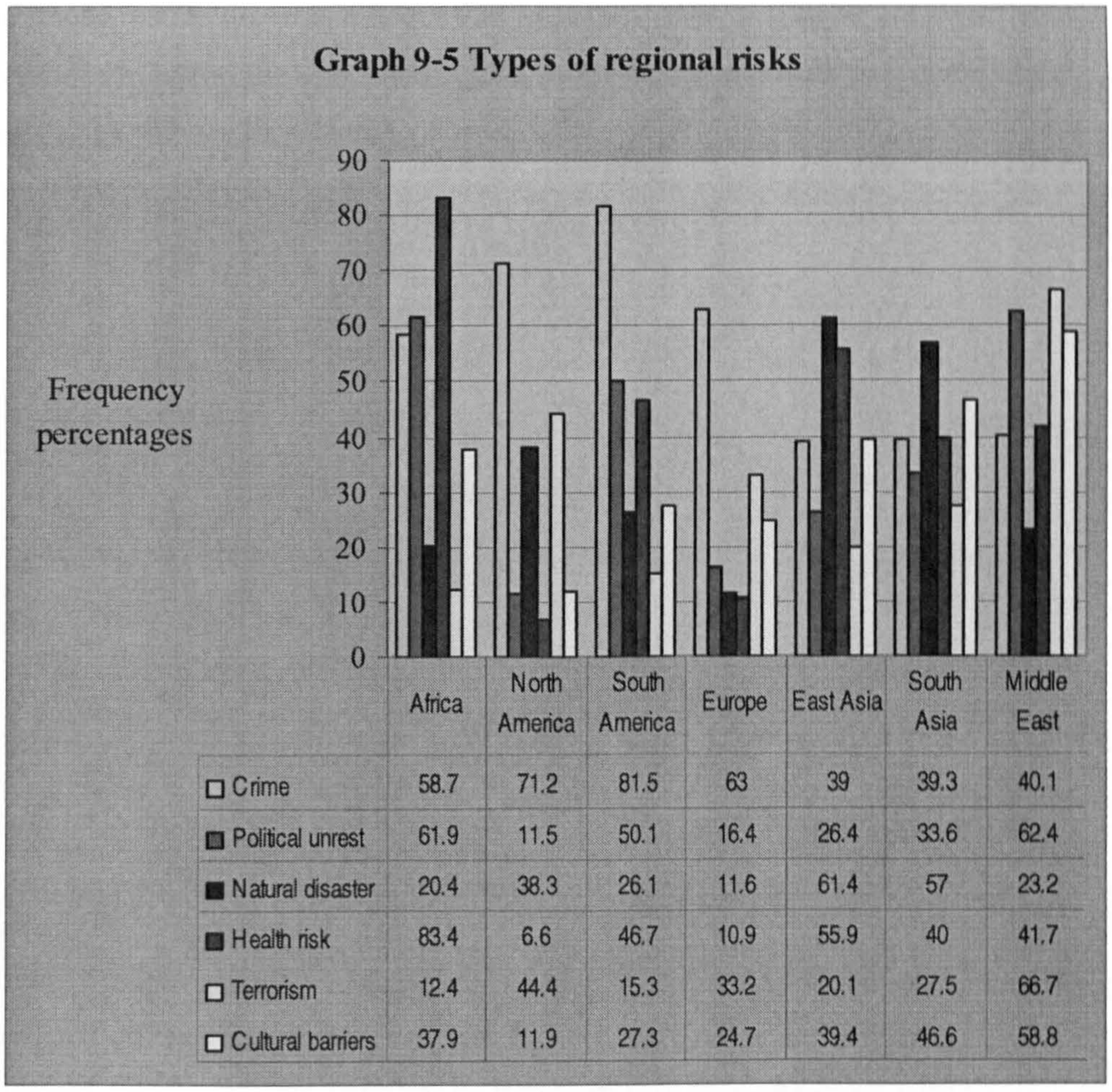
In terms of the types of regional risks, the panel members were asked to comment on the types of perceived risks that were associated with the different regions, a topic that was also explored in the questionnaire survey (graph 9-4 and 9-5).

Graph 9-4 Types of regional risks(Delphi)



	Africa	North America	South America	Europe	East Asia	South Asia	Middle East
Crime	65.2	78.3	100	56.5	39.1	40.9	20
Political unrest	56.5	4.3	52.2	4.3	26.1	45.5	75
Natural disaster	17.4	8.7	17.4	4.3	26.1	45.5	10
Health risk	82.6	0	34.8	0	34.8	50	25
Terrorism	17.4	21.7	13	34.7	17.4	36.4	90
Cultural barriers	4.3	4.3	17.4	8.7	39.1	18.2	40

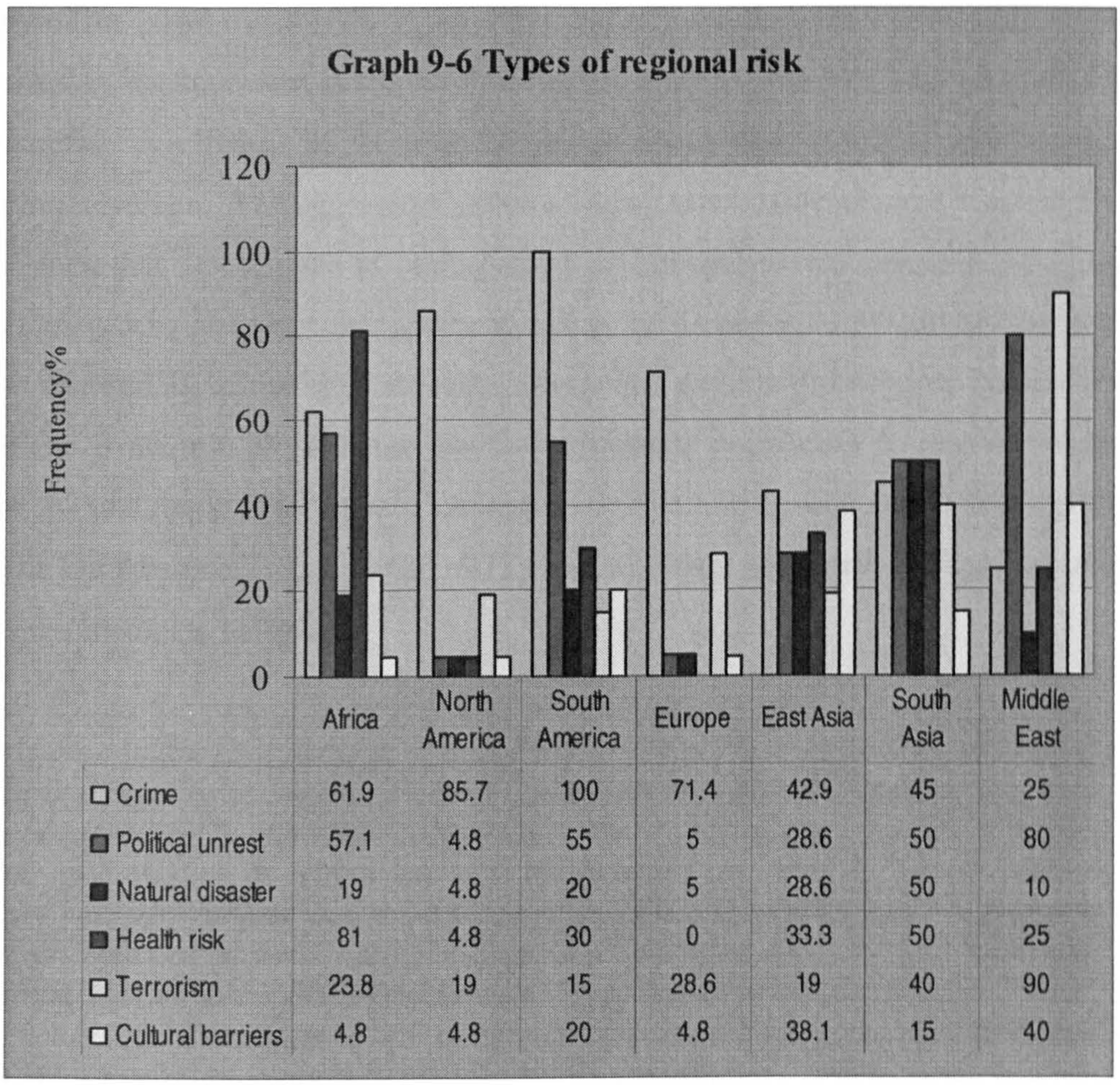
The consensus between the results of the questionnaire survey and the panellists is evident. In both results Africa was deemed by the majority to have the highest perceived risk for Health risk issues, whilst North America and South America are both ranked high in terms of Crime related risk. Europe was perceived to be the safest region in both sets of results, and within Europe crime was seen to be the greatest risk. As one panellist mentioned (25), this is perhaps because "Crime is a fairly high frequency event".



	Africa	North America	South America	Europe	East Asia	South Asia	Middle East
Crime	58.7	71.2	81.5	63	39	39.3	40.1
Political unrest	61.9	11.5	50.1	16.4	26.4	33.6	62.4
Natural disaster	20.4	38.3	26.1	11.6	61.4	57	23.2
Health risk	83.4	6.6	46.7	10.9	55.9	40	41.7
Terrorism	12.4	44.4	15.3	33.2	20.1	27.5	66.7
Cultural barriers	37.9	11.9	27.3	24.7	39.4	46.6	58.8

Although there were clear differences between the Delphi and questionnaire results in terms of the perceptions about specific travel-related risks in each of the regions,there were also some commonalities. For instance, Crime figured highly for the regions of Europe, North and South America. Although the questionnaire survey gave more power to the concerns about natural disasters in South and East Asia , the Delphi panellists also gave this form of risk relatively high ratings for these regions, the impact of the Boxing Day 2004 Tsunami undoubtedly influencing this perception. The main risk concerns associated with the Middle East from the questionnaire survey are terrorism, political unrest and cultural barriers. The views from the Delphi panellists were similar, with 90% of the experts suggesting that political unrest and terrorism were the main issues in this region, but the cultural barriers were considered less important at 40%.

From these results it seems evident that hypothesis H6: that there are significant differences between the different regions of the world and their perceived travel-related risks, cannot be rejected.



	Africa	North America	South America	Europe	East Asia	South Asia	Middle East
Crime	61.9	85.7	100	71.4	42.9	45	25
Political unrest	57.1	4.8	55	5	28.6	50	80
Natural disaster	19	4.8	20	5	28.6	50	10
Health risk	81	4.8	30	0	33.3	50	25
Terrorism	23.8	19	15	28.6	19	40	90
Cultural barriers	4.8	4.8	20	4.8	38.1	15	40

The Delphi exercise also included two aspects relating to travel risk that were not included in the questionnaire survey. These two aspects were focused on the difficulties in achieving tourism development in the Middle East region general and in Iran, in particular. More than 90% of the panellists strongly or very strongly agreed with hypothesis H8: that the Middle East region's tourism development has suffered because of the perceived level of travel-related risk. Many of panellists believed that the solution to these difficulties lies in political developments; however, they felt that little could be done to improve the political and ethical issues. Some panel members also felt that the image of the Middle East has gone badly wrong, and people are unable to differentiate between countries within the region at present. Others felt that the perceived levels of risk were not far from the actual, suggesting that it is not the perception of Middle East that is dangerous it is 'reality'(7). Some panel members

also drew parallels with Northern Ireland where similar image problems, generated during the conflict period, have caused tourism development to falter (17, 7, 15, 27).

Many of the panel members suggested that the solution to better tourism development requires an enhancement in the levels of safety and that the Middle East would need to generate confidence in the tourists' minds about their sincerity with respect to fighting terrorism. The aggressive policies shown towards Israel were also mentioned as an area that would need to be improved. Although, as we have seen, the Delphi panel members were not as convinced about the importance of cultural barriers as those responding to the questionnaire survey, the experts did suggest that there is a need for awareness programmes for the indigenous population so that they become more tolerant towards foreigners, curbing extremist propaganda which urges locals to hate or kill foreigners (2, 3, 5, 6, 7, 8 15, 16, 27). Some anecdotal evidence mentioned by panel members included:

> *As the Middle East features almost daily new reports of hazardous incidents in one country or another in the Middle East it is hard to imagine that the area as a whole can reduce the image. There are, of course, some notable exceptions such as Dubai but until the troubles are resolved the problems are not 'perceptions' but 'reality'. Foreign Office guidelines will not remove high risk destinations until their status is changed and this will have an impact on people's likelihood to visit. Egypt has demonstrated that terrorist events can be overcome but it does need consistent level of stability to do so (7).*
>
> *Nothing - Image is like a brand. The second hardest thing in branding is to change the brand. The hardest is to create it. As a westerner, the brand identity/destination image of the Middle East is as one being unsafe however; it can change by targeting new markets, such as Russia and former Russian Republics(5)*
>
> *Focus on their present markets and try to increase visitation and length of stay from them rather than spending a lot of time and money with newer western markets (11).*
>
> *Stress the positive aspects of tourism in each destination;*
> *Provide good, reliable information to the tourist and travel agent;*
> *as far as possible 'steer' the tourist to the relatively risk-free areas of the country(2).*
>
> *You have to define your terms. Middle East is broad for most people and includes most of the Arabian Peninsula, as well as Israel and its neighbours.*

Yes, it has an effect Israel, Syria, Jordan, Lebanon. No it does not have an effect Egypt, Saudi, Dubai all for various reasons. Israel survives only on religious tourism and Jewish commitment tourism. Egypt is ok but cannot diversify. Saudi is Ok because of the Haj and Dubai is Ok because of $$$(5).

.....but presenting an image that Dubai is liberal, westernised, fashionable, new, luxury, fantasy, business-as-usual, everybody-is-welcome, even though not far across the water the war is still on-going. It is a really good PR that Dubai did. Aggressive marketing, price cut (it is really cheap holidaying in Dubai), government-led tourism development, tolerance towards everything from religion, drinking, drugs etc (as long as you don't get caught). Also Dubai establishes itself as a safe, secured, law and order, clean, affordable luxury destination (12).

Some of the earlier comments are in line with findings of related questions in the questionnaire survey, which show that there is a travel pattern in the Middle East and countries fall in to three categories:

- Very High Risk (I must not go);
- High Risk, and;
- Average risk.

In contrast with most of the comments, one of the panellists believes that "there are "hot spots" in many places – including many American cities, or almost at any soccer game. *The perceived risks outside these certain hotspots, including many areas within the Middle East are not higher than elsewhere* (25).

Many of the panellists generally believed that Iran is a very desirable destination (3), its fabulous culture, history and art is a major attraction (16, 12) and that it is blessed with many unique tourist sites (2, 12) and friendly hosts (5, 17, 12). However, running counter to this, the majority (74%) either very strongly or strongly agreed with hypothesis H9: that the travel risk perception of Iran is the main hindrance to the development of tourism activities. The panellists went on to suggest that the high risk perception has been created mainly through political means such as anti-western attitudes and religious restrictions (i.e. not female friendly). They also suggested that the problems are probably not safety issues as a result of terrorism or crime (2, 5, 11, 12, 15, 16, 23, 28) and that the issue of perceived risk in travelling to Iran is a little more complex than for other countries of the region. However, one of the respondents suggested that 28:

It isn't travel risk in the country that causes people not to travel there – it is basic cultural ignorance and a fear of the unknown.

Some see a resolution to the difficulties in solving the political differences between Iran and the West, mainly between Iran and USA. Also, while Iran is labelled as a harbourer of terrorists and a hostile nation by the USA and other countries, one cannot expect it to be successful in developing tourism (3, 7, 12, 27):

Actions such as this will ensure the failure of Iran to develop a tourism industry based upon western clients. The position could alter dramatically if the political situation were to change. Iran would receive a considerable pent-up demand from long-haul tourists in Western Europe and North America. (2)

A few disagreed with the emphasis being placed solely on the political problems, suggesting instead that Iran suffers from an antiquated visa system, high costs, poor access and poor infrastructure (5) and that Iran is perceived as boring (hardly a recipe for successful development!):

It will NEVER be an international destination until and unless these issues are addressed. Politics is the least of its worries, especially given that there is a large and emerging non-western travel market..... It also suffers from an unclear destination image. Egypt has taken antiquities; Dubai - Arab tourism; Turkey resorts; many other places shopping. How will it position itself uniquely?(10)

...Until the risk of becoming a victim of religious bigotry is reduced many will avoid the country. The bad press about its nuclear programme is, to my mind, of secondary importance to the fear of unprovoked danger by not believing in their particular religious 'brand'. Tourism is about welcoming people regardless of their race or religious beliefs and the perception of the way in which Iran is governed is that the religious leaders are more powerful that its elected ones. There is no clear demonstration that they wish to welcome tourists and so if they do want to become a popular destination they will have to spend a lot of money convincing would-be visitors that they will be welcome.(7)

9.4 The Delphi Progression

Although not a key aspect of this research, it is worth spending a brief moment looking at the effectiveness of the Delphi exercise as an approach. The questionnaire

survey gives the respondents a single opportunity to respond to the issues. In contrast, the Delphi exercise gives panel members multiple opportunities to respond and then modify their responses. This particular study gave panel members three opportunities to revisit their responses and it is worth considering whether this multiple opportunity achieved any significant changes in the responses provided.

To examine whether or not iterative panel data perform differently to non-iterative, the Wilcoxon Signed-Rank Test was implemented. The Wilcoxon Signed–Rank Test indicates that there were significant changes in the responses to 5 of the questions between round one and round two (Table 9-2 and 9-3). For example, for question relating to the importance of previous experiences influencing travel-risk perceptions there were 5 panel members in the first round who felt that the impact of previous experience was not important, but by the second round they had changed their view and this resulted in a consensus (100%) of panel members holding this view (see Table 9-1, previous experience). For the question relating to the impact of occupation on the travel-risk perceptions again there were 5 panel members who changed their view from the first to the second round. In three other questions there were panel members who changed their point of view between the first and second rounds. Given the panel size (25) at the second round this means that on average 20% of the panel made changes to their responses after considering the viewpoint of the panel as a whole. On that basis one might agree that there is a difference in the performance of iterative panel exercises compared with non-iterative. This does not mean, however, that the former perform better than the latter in terms of their reliability or accuracy.

The same test was undertaken on the responses made in the second and third rounds of the Delphi exercise and it was found that there were no significant changes between these two rounds. Therefore if it were not for the additional exploration of the issues relating to the Middle East and Iran, the third round did not add anything to our understanding of the issues.

Table 9-2 Wilcoxon Signed–Rank

		N	Mean Rank	Sum of Ranks
S. Previous experience - Previous experience	Negative Ranks	0(a)	.00	.00
	Positive Ranks	5(b)	3.00	15.00
	Ties	18(c)		
	Total	23		
S. Impact of occupation - Impact of occupation	Negative Ranks	0(d)	.00	.00
	Positive Ranks	5(e)	3.00	15.00
	Ties	18(f)		
	Total	23		
S. Impact of education - Impact of education	Negative Ranks	0(g)	.00	.00
	Positive Ranks	4(h)	2.50	10.00
	Ties	19(i)		
	Total	23		
S. Country of origin - Country of origin	Negative Ranks	1(j)	3.50	3.50
	Positive Ranks	6(k)	4.08	24.50
	Ties	16(l)		
	Total	23		
S. Greatest single risk - Greatest single risk	Negative Ranks	5(m)	3.00	15.00
	Positive Ranks	0(n)	.00	.00
	Ties	14(o)		
	Total	19		

a S. Previous experience < Previous experience

b S. Previous experience > Previous experience

c S. Previous experience = Previous experience

d S. Impact of occupation < Impact of occupation

e S. Impact of occupation > Impact of occupation

f S. Impact of occupation = Impact of occupation

g S .Impact of education < Impact of education

h S .Impact of education > Impact of education

i S. Impact of education = Impact of education

j S. Country of origin < Country of origin

k S. Country of origin > Country of origin

l S. Country of origin = Country of origin

m S. Greatest single risk < Greatest single risk

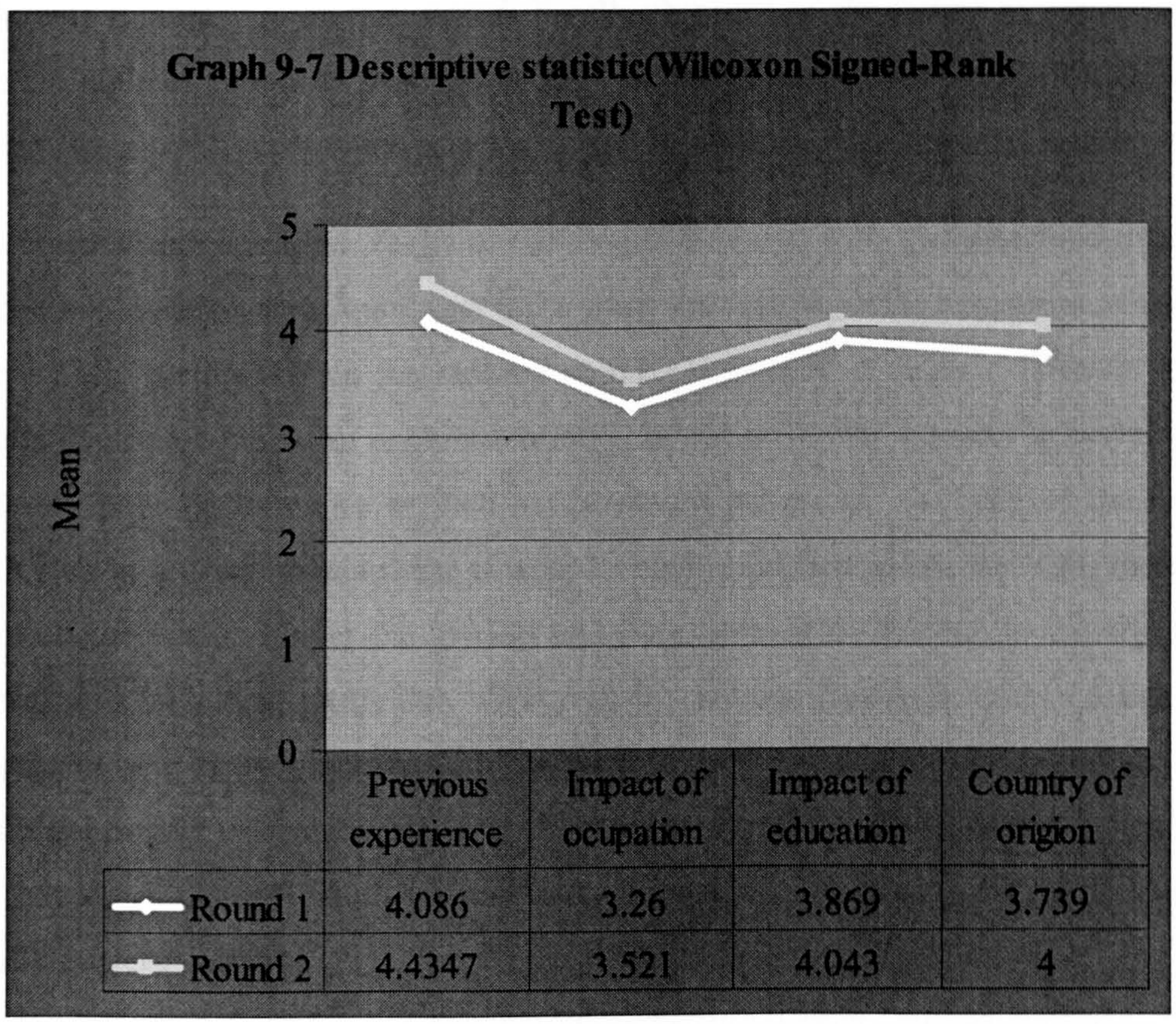
n S. Greatest single risk > Greatest single risk

o S. Greatest single risk = Greatest single risk

Table 9-3 Test Statistics(c)

	Previous experience	Impact of occupation	Impact of education	Country of origin	Greatest single risk
Z	-2.060(a)	-2.121(a)	-2.000(a)	-1.897(a)	-2.041(b)
Asymp. Sig. (2-tailed)	.039	.034	.046	.058	.041

a Based on negative ranks.
b Based on positive ranks.
c Wilcoxon Signed Ranks Test



As can be seen in Graph 9-1, the mean values relating to each of these issues increase as we move from round 1 to round 2.

Conclusion

The Delphi analysis more or less confirmed the results that were derived from the questionnaire, with a few important exceptions. Probably the most significant is the importance that the panel members, almost universally, gave to terrorism in shaping travel-risk perceptions. Yet when the travellers were asked this, they only rated terrorism as the 11th level of risk. For the operation of the Delphi it should be noted

that after three rounds, the Delphi consensus was achieved on 18 out of 23 statements (see appendix 4) encompassing individual risk perception, general risk, types of regional risk perception, and in particular the Middle East and Iran (see appendix D-1).

It should be noted that the conclusions of the study are based on an interpretation of data presented in the study and restricted to the population survey, however most of the findings are in line with public perspective (questionnaire survey). Second, the consensus findings are tourism-based. Finally, because of the failure to get responses from a couple of panellists from the Middle East region, after round one, the majority of panel members (except one) seem to normally reside outside the Middle East area.

This chapter compared the results of the Delphi analyses with those derived from the questionnaire survey and found that there were similarities in the responses as well as divergences, particularly in the ranking of different types of risks. Tourism in the Middle East and Iran was explored briefly, in terms of the reasons underlying its relatively poor performance as well as the future prospects. In spite of the region being rich in tourism assets from climate through environment to heritage, there are many obstacles that hinder the growth and development of tourism to the region in general and to Iran in particular. Whereas the region is painted with a brush that suggests it is a risky place to visit because of political unrest and terrorism, it is possibile hostility towards westerners, the treatment of the female sex and the cultural gap that keeps many western visitors away from even the most peaceful and secure Middle Eastern country.

Chapter 10
Conclusion

Evaluation of research objectives

The central objectives of this research were seven-fold. To examine the literature with respect to travel risk, to determine the effects of major incidents on travel to specific destinations; to explore the differences in recovery time and to attribute such differences to factors such as the nature of the incidents or the marketing response of destinations; to evaluate the work that has been done in determining risk perceptions; to study the travel risk perceptions of travellers from different backgrounds; to examine the differences between the perceived risks and actual risks of specific destinations; To explore the effects of perceived travel risk on future travel (using the Delphi Technique).

10.1 Objectives one and four

- To examine the literature with respect to travel risk
- To evaluate the work that has been done in determining risk perceptions

The key difference between these two objectives shown above is that the first relates to those activities that may disrupt the operation of the tourism system. That is, they could be relatively minor blips to the system such as an airline crash, or major blips such as the outbreak of war. The second objective listed above is concerned with the factors that influence the levels of risk perceived by tourists, notwithstanding the influence of specific events included in the former objective. These could relate to demographic factors such as age, sex and education or to other experiential factors such as the level of risk to which they are normally exposed, the media images of a destination or even previous experience.

The literature (Chapter 2) introduced the tourism system, and examined how the popularity and desirability of specific tourism destinations is influenced by different push and pull factors (Margrete and Edelheim 2004) and, in particular, the impact of impediments into tourism motivation in the light political event. Many experts believe that tourists implement their freedom and power to avoid risky situations or destinations (Hall, 1994; Wahab, 1996; Wall, 1996, p145; Wahab et al. 1996; Pizam 1999, Sonmez 1999; Sonmez et al. 1999; Cooper, 2001; Aktas et al. in Theohold 2005). The literature also discussed how some believe that while that natural disasters

can obstruct the flow of tourism, terrorism risk tends to frighten the travelling public more severely. Violent protest, social unrest, civil war, terrorist actions, the perceived violations of human rights, or even the mere threat of these activities can all serve to cause tourists to alter their travel behaviours Hall(1994).

The main goal of Chapter 6 was to examine the concept of risk perception in association with travel and in particular, with respect to the leisure traveller. The literature discussed how the images people have of destinations are of immense importance in discretionary forms of tourism such as recreational vacations, where the destination is not predetermined by business demands or social necessities. This is because the product, at least for the first-time visitor, is an intangible one that cannot be directly experienced prior to its consumption. In these cases, potential visitors must rely on their images in choosing one destination over another. In other words, as far as the tourism originating country is concerned, the perceived risk of a particular destination is everything because it is that perception that will influence demand. Of course, there may be travel-risk perceptions about the fundamental and generic aspects of tourism such as the risks involved and perceived associated with the different modes of transport. These may influence whether a traveller will fly or drive or go by sea, for instance. However, once the fundamentals are decided it is very much a question of the perception of the destination or the region in which the destination is located.

The literature also revealed that there are a variety of risks that may influence the travel decisions of tourists, including those relating to physical harm, financial loss and the risk of dissatisfaction from their travel experience; and that there are many factors that may contribute to it, such as individual background and demographic characteristics. It further considered whether it is the frequency of negative events, natural and man-made that is increasing or it is simply that each disaster has a more disturbing impact (Grainger and Crouch 2006), or simply that the mass media influences people in terms of their perception of risk. The end result is the same; people seem to have become more concerned with risk issues when they travel as tourists. When the tourism experts were asked whether there had been a change in risk or risk perceptions over the past 10 years, it was interesting to see that although

the first round suggested that there had not been a change, these views were modified as the Delphi progressed. A second round response was that the level of risk perception had changed on some aspects of risk, notably health risks, but by the end of the Delphi the experts (70% of them) felt that the level of perceived risk had increased and this falls in line with the findings from the literature and one's own instinctive thoughts.

10.2 Objectives two and three:

- To determine the effects of major incidents on travel to specific destinations
- To explore the differences in recovery time and to attribute such differences to factors such as the nature of the incidents or the marketing response of destinations.

A selection of incidents and the time recovery period with respect to six case studies was undertaken for this study from developed and developing countries in Chapter 3 and Chapter 4. These attacks, in spite of not being targeted at tourism, increased people's risk perceptions of travelling and reduced the arrivals number. Pizam and Flesicher (2001) also suggested in their study that terrorist attacks, whether of high or low intensity, do affect tourism flows.

This study has shown that as result of attacks, the number of tourists who visited Egypt a year after the attack decreased by one million. The corresponding figure for Indonesia was a decrease of 600,000 and for the USA a decline of 2.7 million (See Graph 4-24). Tourism revenue also declined in the earlier cases. The direct loss to Egypt was 1 billion US$ (See Figure 3-2), more than 5,200 US$ million in the USA (See Graph 4-1) and 1248 million US$ in Indonesia (See Graph 3-6). The impacts however were less significant in the three other case study areas, namely Kenya, Spain and the UK and the impacts were found to be less in terms of both arrivals and expenditure where the figure carried on as either the same as before the attacks, or even higher.

In terms of the next objective, all destinations increased security post attacks and undertook an extensive marketing campaign. However, one might argue that the

increased security may raise risk averseness in travellers who may feel that the risk must be high if the level of security has been increased. Some have argued that the size of an economy (GDP) has got much to do with ability of a country to resist terrorist attacks (Sandlers and Enders, 2005) but this view is not supported by the evidence from the case studies. Tourism in Spain and the UK are good examples of where the tourism flows did not decrease significantly following the terrorist attacks, even though the characteristics (countries of origin, socio-economic groupings etc) of visitors may have been changed by the events. On the other hand, the USA showed a significantly different pattern of effects and the recovery of the industry took more than three years. Pizam and Flesicher (2001) suggested that the magnitude and nature of the impact depends on the frequency of attacks (which may act as a proxy for the likelihood of future attacks) and where there were no repeat attacks, they concluded that tourism in the area tended to return to normal in a period of between 6-12 months. The results of this study suggested that the recovery period does vary significantly and that there are many factors that may explain such variations. Such factors include the timing of the attack, the stage of tourism development, the scale of the attacks, the frequency of the attacks and the responses after the attacks (Pizam 1999; Darkus and Kutan, 2001; Frey et al. 2004; Bruck and Wickstrom 2004, Darkus and Kutan, 2001). It is difficult to see only one factor being responsible for explaining the recovery period and the impact of the attacks. This study also suggests that while, not surprisingly, travel-warning issues have a significant role in shaping the traveller's mind, the issue of travel warnings is dominated by more general marketing and political issues.

10.3 Objective five:

- To study the travel risk perceptions of travellers from different backgrounds

The study has shown conclusively that the perceptions and attitudes of tourists play an important role in the holiday decision-making process and that perception of risk is a multidimensional concept. Each dimension of risk has a different magnitude and impact on the tourism industry. In this regard, this study has provided a broad approach for the classification of risk perceptions and evaluation of those perceptions. The study also recommended that demographic variables are, to some extent, influential factors in determining the level of perceived travel-related risk. However,

it would seem from the evidence that some variables are more important than others in explaining variations in risk perceptions. The demographics of travellers alone do not determine the tourists' behaviour and this finding is in line with the finding by Cleaver (2000) who concluded that "*gender and martial status and dependent children offer more insight*". This study also suggests that age is to some extent an influential factor in determining risk perceptions but not in a simple linear fashion. The young seem less concerned than the old and the middle-age groups seemed to be the most concerned of all. Also, the type of risk seemed to vary by age groupings. In contrast, occupation and education levels did not seem to offer much in the way of explanatory power when it comes to the level of travel risk perceptions. The influence of a traveller's previous experience and/or those close to them was found to be highly influential in determining travel risk perceptions, bringing worse fears into reality. This was a finding of the literature and the analyses of this thesis (Goodrich 1978; Perdue 198; Sonmez and Graefe 1998).

10.4 Objective six

- To examine the differences between the perceived risks and actual risks of specific destinations

According to Psychometric research which "rests on pioneering research in cognitive and social psychology", perceived risk may be characterized by a distorted view of actual risk, formed by the lack of knowledge, previous viewpoints and subjective individual knowledge without real substance (Jasanoff 1998). This study briefly looked at the data provided by a major insurance company in terms of crime and health claims whilst travelling. The questionnaire survey asked the respondents to reflect their views about the different destinations and their perceptions of risk related to those countries. The results from the questionnaire when compared with the actual claims from the insurance company data set revealed how perceptions could be far from the reality. The countries identified by travellers as being of high risk with respect to health issues and crime did not correlate with the top countries in terms of actual claims. From this finding one can surmise that there is no real correlation between actual and perceived risks, that perhaps the images derived by travellers outweigh the evidence in terms of where the real risks are located. This is useful

information for destination marketing agents who may be able to attract visitors even when the reality is such that there is a relatively high level of risk for visitors. Equally, it must be depressing for marketing managers to find that the image of their destination is such that tourists feel there is a high level of risk associated with visits to their destination even when the truth is that the risk is relatively low. This problem is similar to those relating to modes of transport where travellers may perceive air travel as being relatively risky in spite of the evidence that road traffic accidents offer far more risk. The Delphi panel members started off their rounds by suggesting that there was also no strong correlation between perceived and actual risk, but this view softened during the course of the exercise when they argued that there are some aspects of risk where travellers generally perceive them to be higher than the actual and ended up by suggesting that in general, travellers will perceive risks to be higher than they actually are.

10.5 Objective seven

- To explore the effects of perceived travel risk on future travel (using Delphi Technique)

In line with previous studies (Sunmez,1999, Thomas, 2003b), travel related risk is a major factor in travel decision making while the result of Delphi survey suggested that political risks are the greatest single type of event that generates travel-risk averseness .This finding is also consistent with the view expressed by Jones et al. (2006). The study also shows that although the public may be influenced by the media in terms of their perceived levels of travel-related risk, their perceptions of risk may not necessarily run parallel to the way that the media or academic experts feel about the issues. Attitudes towards risk are more complex and in some cases difficult to formalise. For instance, while the majority of experts in this study believe that terrorism is the greatest single type of event that generates travel-risk averseness and that people are more concerned about travel-risk related to acts of terrorism and political unrest than they are about other risks such as those related to natural disasters, the questionnaire survey revealed that terrorism is far from being the major risk concern to people.

It also emerged from the preliminary study that there is a strong relationship between the region of the world and the perception of travellers towards risk. The region involved in the travel decision enters the debate in two ways. First, in terms of the way that people originating from different regions feel about travel-related risk. For example, people originating from a region such as Latin America, where crime is more prevalent, have lower perceptions of crime-related risks when they travel than, say, travellers originating from Europe. Secondly, it became clear from the survey data and was later supported by the Delphi study, that some regions to which tourists may travel are associated with specific types of travel-related risks. Some regions, such as Africa, were notable because of elevated risk perceptions regarding health, others, such as the Middle East, in terms of the risks associated with political unrest and terrorism. In addition, it was evident that tourism travel to the Middle East has suffered from the perceived levels of travel-related risk (mainly political and cultural) and that travel related risk is one of the most significant factors that have hindered the development of tourism activities in the region in general and in Iran in particular. The findings also brought to light the fact that there is an identified travel pattern in the Middle East where countries in the Middle East region can be divided into three groups (1) very high risk, (2) risky and (3) countries with an average level of risk.

The survey also explored how many believed that the tourism industry in Iran has suffered as a result of the political and anti-western policies emanating from within the country, combined with religious restrictions, particularly towards the foreigner (i.e. female unfriendly limitations). Moreover, the majority of the international tourism experts in the Delphi panel suggested that little could be done to improve the prospects of tourism in the country unless the political situation changed. This research suggests that although the five major aspects of sun, sand, sea, sex and security are seen as a core to developing tourism in most regions in the world, the sixth "s" seems to be critical in the Middle East, 'Secularity'.

10.6 Implications of the study

The series of terrorist attacks that have taken place in recent times, particularly the high scale events that targeted civilians and tourists, has raised issues for tourism managers who are responsible for planning or marketing tourism. The main issues

being how to deal with the somewhat indeterminate impacts and long term effects of the attacks. A good understanding of risk perceptions and the factors that influence them is one area where they could focus to develop a risk management plan and to deal with severe events. Jasanoff (1998) suggested that "theories of risk perception" are naturally political as they take within them implicit understandings about how to systematize and put into practice policies for managing risk. This study has highlighted the complexities of how risk perceptions are formed and the factors that influence such formation. By drawing attention to the travellers' perceptions about the hierarchy of risks and the factors that influence them, it will help policy and strategy makers build in relevant aspects when making their plans.

This study has contributed to a better understanding of risk perceptions, both from travellers' side and the experts' point of view. This is important because the experts chosen for the Delphi Panel were influential tourism specialists whose advice is often sought by destinations when making their tourism strategies. If the experts' views do not concur with those held by the travellers there is a danger that strategists may overreact in some cases, such as convincing the travellers that their destination is safe from political unrest, and overlook the importance of assuring visitors that crime and health are not high risk elements of travel to that destination. The travellers' perspective is even more critical for the policy maker in terms of how people conceptualize and perceive different kinds of risk. The data gathered from the public also show, for instance, that people seem to be less aware about the level of crime risk in South America whereas the experts in the Delphi were aware of these risks.

These issues are particularly important for tourism policy makers and so destinations need to be aware of the dimensions of risks and how they are likely to impact on their industry. Such awareness would enable tourism managers/planner to design and implement policies to reduce the negative effects of risk perception. These issues are relevant to destination marketers, travel intermediaries, insurance companies and the wider tourism industry.

The study also suggests that there is evidence that indicates that the Iranian Government is reluctant to proactively attract tourists. The results also demonstrate that the Middle Eastern travellers are less concerned about travelling to Iran than

visitors from outside the region, a point that could be of interest to the Iranian government for their marketing plans. This aspect can be generalised further in that people tended to have higher levels of perceived risk when travelling to countries outside their region than when travelling within. This may to a large extent be because the greater the difference between their cultures, the greater the level of unknown which leads to greater uncertainty and hence risk perceptions. This too is a useful outcome for those involved with promoting and developing tourism, the challenge of educating potential visitors as to the richness of their culture in order to reduce the levels of uncertainty.

10.7 Limitations

Research is rarely ideal and there are always compromises to be made as a result of resource constraints and the availability of data. The researcher has done all within her power to optimise this research within the constraints imposed by these factors. However, there are several limitations associated with the findings of this research and hence in terms of the general applicability of the results reported in this thesis. Firstly, 51% of the questionnaire respondents were British citizens and thus the results are somewhat Anglo-biased, whereas it would have been better if the respondents had been more diverse. Due to resource and time constraints and therefore the nature of the data collection, the respondents were grouped more heavily in terms of age groups than would have been ideal. For instance, with 48 % of the respondents being between 18-29 years old and a further 9 % being 17 years old the sample is weighted towards the young travellers, a fact further amplified by noting that 56 % of the sample were recorded as being students. Furthermore, due to a lack of geographical knowledge by many respondents it proved more useful to count South Asia and East Asia as a single region as it avoided confusion amongst respondents. This study was originally intended to focus far more on the development of tourism in Iran and the activities of the Government in Iran in stimulating tourists' travel risk perceptions. However, such views are considered contentious in Iran 'as the Iranian government has grown increasingly suspicious of academics and academic institutions as possible driving forces behind efforts to change the government in Iran' (Herald Tribune 10.05.07). Adding further fuel to this fire, the warning issued by the Iranian government suggesting that Iranian academics need to be careful about what they say

(BBC,30.05.07) tends to deter researchers from fully pursuing their intended goals. This research was constrained in this respect on the advice of my supervisors and this limited the level of detail that could be explored with respect to the situation in Iran.

This research did not take place in a vacuum and thus the data collection period was not sterile in terms of factors that may influence the respondents' attitudes towards risks. In particular, as the questionnaire data started to be collected the conflict between Israel and its neighbours heightened, bringing the conflict to respondents' television and radio sets on a daily basis. In order to counter this and to see if there were any significant differences in responses during the crisis and after the crisis, the questionnaire collection period spanned the pre-, during and post-conflict periods. Although there were no statistically significant differences between the structure of the responses in these three periods, the researcher feels that any effect will have been diminished by the fact that the data collection took place across the three different periods.

Finally, as Abediei and Gardeazabal (2002) suggested, 'research of this sort could potentially have an undesirable impact if terrorists learned that their actions affect economies negatively, assuming that is what they want to do'. They add:

We do hope that the finding by Nelson in Scott (1992) is true that media attention does not cause terrorism, and that in addition to this, academic study does not provide those who act in such a way with the credibility to continue their actions.

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Appendix 1

My name is Yeganeh Morakabati and I am a doctoral researcher at Bournemouth University. The purpose for which this information being collected is to develop and measure peoples' perceptions concerning travel risk. As I am interested in your views and opinions, I have created a short questionnaire which I would like you to complete. The questionnaire is simple to complete as it only requires you to express your opinions. The results of this research will be aggregated to examine the different perceptions of risk by people from different backgrounds. No single individual's response will be published.

Thank you very much in advance for helping with this valuable research project!

The following statements refer to your perception of destination risk. For each of the statements, please indicate the number that represents your perception of the level of risk when you travel using the following scale:

5	4	3	2	1
High risk	**Greater than average risk**	**Average risk**	**Lower than average risk**	**Low risk**

When I travel to another country I think that.....

Note: *in the final column, could you please suggest up to 3 countries where you feel they have high risks.*

	Physical risk	**5**	**4**	**3**	**2**	**1**	**High risk country examples**
Q1	The risk of getting food poisoning is…						
Q2	The risk of having health problem is …						
Q3	The risk of being involved in a natural disaster (e.g. earthquake/storm) is						
Q4	The risk of getting injured in an accident (e.g. car, bus,…) is						
Q5	The risk of crime (theft, robbery, pickpocket) is						
Q6	The risk to me by acts of terrorism is …						
Q7	The risk of being exposed to danger due to political unrest (civil unrest) is…						
	Financial risk	**5**	**4**	**3**	**2**	**1**	
Q8	The risk of not getting good value for money is …						
Q9	The risk of incurring unexpected expenses is …						
Q10	The risk of suffering as a result of credit card fraud						

	is…						
	Performance risk	**5**	**4**	**3**	**2**	**1**	
Q11	The risk of experiencing poor weather is …						
Q12	The risk of having to put up with poor hotel accommodation is…						
Q13	The risk that the place will be overcrowded is …						
Q14	The risk that I will not like the food is …						
Q15	The risk that my travel will be disrupt because of possible industrial action/strike (e.g. at the airport, railways, and buses) is…						
Q16	The risk that the tourists facilities (e.g. beach) will not be acceptable is…						
Q17	The risk that the local population may not be friendly is …						
Q18	The risk that my trip might change my own behaviour is…						
Q19	The risk that my code of dress and behaviour will not be well received by the local people is …						
Q20	The risk of not being able to communicate with local people (language) is …						

Q21 – Please order the following regions from 1 to 6 according to the level of perceived risk eg. Allocating "1" to the regions with the highest perceived risk, "2" to the country with the second highest perceived risk and so on to "6".

	Ranking
o Africa	.....
o North Americas (USA and Canada)	.....
o Latin America	.....
o Europe	.....
o Asia (excluding Middle East)	.....
o Middle East	.....

Q22 – Please list what you see as the major type of risks associated with each of the following regions

1 = Crime 2 = Political unrest 3 = Natural disasters

4 = Health risks (disease, epidemic) 5 = Terrorism 6 = Cultural barriers.

Region	**e.g. 1, 3 and 6… etc.**
Africa	

North America	
Latin America	
Europe	
Asia (excluding Middle East)	
Middle East	

Q23 – With respect to the Middle East and some selected countries can you indicate how 'risky' you feel it is to travel to them. If you say a destination is a "very high risk" please specify why in the box marked other.

(5 = very high risk; 4 = high risk; 3 = average risk; 2 = low risk; 1 = very low risk)

Country	5	4	3	2	1	Where you have given a "5" (the highest level of risk) to a country please comment briefly why? e.g. Disease, War, Crime levels, etc.
Afghanistan						
Bahrain						
Egypt						
Iran						
Iraq						
Israel						
Jordan						
Kuwait						
Lebanon						
Libyan Arab Jamahiriya						
Oman						
Palestine						
Qatar						
Saudi Arabia						
Syrian Arab Republic						
Turkey						
UAE						
Yemen						

Finally, could you give a few bits of information about yourself so that your responses can be put into greater context.

Q24) Age	a) 18<	b) 18 - 29	c) 30 - 39	d) 40 - 49	e) 50 - 59	f) 60+

Q25) Sex	a) Male	b) Female

Q26) Marital Status	a) Married	b) Single	c) Other

Q27 – Have you ever been involved in a risky situation on your travels? YES/ NO

Example(s).....

Q28 – Have any of your close relatives ever been involved in a risky situation on their travels? YES/NO

Example(s).....

Q29 – How often do you travel: Number of times a year on average .....

Q30 – Do you generally travel (a) Alone (b) with family (c) with friend(s)

Q31 – Your Occupation (e.g. Manager, student, Sales etc) .....

Q32) Education	Primary	Secondary	Degree	Postgraduate

Q33 – Country and Region of normal residence?

Region	Country

Q34 – Can you please indicate, what is your religious affiliation?

Christian	Jewish	Muslim	Others(please name)	Not affiliated with formal religion

Would you be willing to answer a few more questions related to travel and risk? If so can you provide a contact email or phone number?

.....

Thank you very much for taking the time to complete this questionnaire. Should you have any questions at a later date please feel free to contact me at ymora@bournemouth.ac.uk

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Appendix 2

		The risk of getting food poisoning is...	The risk of having health problems is..	The risk of being involved in a natural disaster(eg earthquake/Storm) is...	The risk of getting injured in an accident(eg car,bus,...) is...	Th (the ry,p e
Correlation	The risk of getting food poisoning is...	1.000	.573	.498	.436	
	The risk of having health problems is..	.573	1.000	.459	.455	
	The risk of being involved in a natural disaster(eg earthquake/Storm) is...	.498	.459	1.000	.519	
	The risk of getting injured in an accident(eg car,bus,...) is...	.436	.455	.519	1.000	
	The risk of crime (theft,robbery,pickpocket) is...	.368	.393	.367	.469	
	The risk to me by acts of terrorism is...	.380	.332	.577	.375	
	The risk of being exposed to danger due to political unrest(civil unrest) is...	.485	.411	.656	.466	
	The risk of not getting good value for money is...	.149	.171	.044	.151	
	The risk of incurring unexpected expenses is...	.211	.207	.132	.246	
	The risk of suffering as a result of credit card fraud is...	.338	.364	.324	.340	
	The risk of experiencing poor weather is...	.044	.160	.071	.128	
	The risk of having to put up with poor hotel accommodation is...	.238	.270	.269	.291	
	The risk that the place will be overcrowded is...	.204	.203	.222	.286	
	The risk that I will not like the food is...	.189	.229	.184	.210	
	The risk that my travel will be disrupted because of possible industrial action/strikes(eg at the airport,railways,buses)is...	.283	.265	.373	.327	
	The risk that the tourist facilities will not be acceptable(eg beach) is...	.271	.293	.272	.347	

	The risk that the local population may not be friendly is...	.261	.262	.357	.320
	The risk that my trip might change my own behaviour is...	.240	.285	.255	.318
	The risk that my code of dress and behaviour will not be well received by the local people is...	.302	.308	.382	.322
	The risk of not being able to communicate with local people (language) is...	.263	.232	.293	.318
Sig. (1-tailed)	The risk of getting food poisoning is...		.000	.000	.000
	The risk of having health problems is..	.000		.000	.000
	The risk of being involved in a natural disaster(eg earthquake/Storm) is...	.000	.000		.000
	The risk of getting injured in an accident(eg car,bus,...) is...	.000	.000	.000	
	The risk of crime (theft,robbery,pickpocket) is...	.000	.000	.000	.000
	The risk to me by acts of terrorism is...	.000	.000	.000	.000
	The risk of being exposed to danger due to political unrest(civil unrest) is...	.000	.000	.000	.000
	The risk of not getting good value for money is...	.000	.000	.137	.000
	The risk of incurring unexpected expenses is...	.000	.000	.000	.000
	The risk of suffering as a result of credit card fraud is...	.000	.000	.000	.000
	The risk of experiencing poor weather is...	.135	.000	.037	.001
	The risk of having to put up with poor hotel accommodation is...	.000	.000	.000	.000
	The risk that the place will be overcrowded is...	.000	.000	.000	.000
	The risk that I will not like the food is...	.000	.000	.000	.000
	The risk that my travel will be disrupted because of possible industrial action/strikes(eg at the airport,railways,buses)is...	.000	.000	.000	.000
	The risk that the tourist facilities will not be acceptable(eg beach) is...	.000	.000	.000	.000

The risk that the local population may not be friendly is...	.000	.000	.000	.000
The risk that my trip might change my own behaviour is...	.000	.000	.000	.000
The risk that my code of dress and behaviour will not be well received by the local people is...	.000	.000	.000	.000
The risk of not being able to communicate with local people (language) is...	.000	.000	.000	.000

a Determinant = .001

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Appendix 3

		Afghanistan	Bahrain	Egypt	Iran	Iraq	Israel	Jordan	Kuwait	Lebanon	LI
Correlation	Afghanistan	1.000	.038	.304	.352	.642	.221	.241	.187	.397	.3
	Bahrain	.038	1.000	.324	.290	.128	.119	.536	.542	.151	.3
	Egypt	.304	.324	1.000	.398	.284	.189	.372	.357	.387	.4
	Iran	.352	.290	.398	1.000	.435	.203	.394	.418	.281	.4
	Iraq	.642	.128	.284	.435	1.000	.359	.317	.287	.424	.3
	Israel	.221	.119	.189	.203	.359	1.000	.359	.216	.345	.1
	Jordan	.241	.536	.372	.394	.317	.359	1.000	.660	.395	.5
	Kuwait	.187	.542	.357	.418	.287	.216	.660	1.000	.431	.6
	Lebanon	.397	.151	.387	.281	.424	.345	.395	.431	1.000	.5
	Libya	.317	.384	.420	.498	.308	.184	.523	.645	.514	1.(
	Oman	.190	.470	.257	.409	.156	.078	.483	.611	.321	.6
	Palastine	.478	-.069	.213	.334	.549	.375	.238	.242	.489	.3
	Qatar	.050	.635	.269	.336	.159	.130	.558	.611	.249	.4
	Saudi Arabia	.263	.379	.405	.455	.246	.151	.471	.519	.270	.5
	Syrian Arab Republic	.277	.306	.410	.492	.283	.156	.483	.550	.522	.6
	Turkey	.076	.261	.335	.293	.151	.187	.320	.346	.223	.3
	UAE	.030	.483	.239	.321	.077	.149	.428	.606	.213	.4
	Yemen	.260	.235	.446	.395	.153	.141	.358	.443	.339	.5
Sig. (1-tailed)	Afghanistan		.271	.000	.000	.000	.000	.000	.001	.000	.0
	Bahrain	.271		.000	.000	.020	.029	.000	.000	.008	.0
	Egypt	.000	.000		.000	.000	.001	.000	.000	.000	.0
	Iran	.000	.000	.000		.000	.001	.000	.000	.000	.0
	Iraq	.000	.020	.000	.000		.000	.000	.000	.000	.0
	Israel	.000	.029	.001	.001	.000		.000	.000	.000	.0
	Jordan	.000	.000	.000	.000	.000	.000		.000	.000	.0
	Kuwait	.001	.000	.000	.000	.000	.000	.000		.000	.0
	Lebanon	.000	.008	.000	.000	.000	.000	.000	.000		.0
	Libya	.000	.000	.000	.000	.000	.002	.000	.000	.000	
	Oman	.001	.000	.000	.000	.006	.107	.000	.000	.000	.0
	Palastine	.000	.137	.000	.000	.000	.000	.000	.000	.000	.0
	Qatar	.214	.000	.000	.000	.006	.019	.000	.000	.000	.0
	Saudi Arabia	.000	.000	.000	.000	.000	.008	.000	.000	.000	.0
	Syrian Arab Republic	.000	.000	.000	.000	.000	.006	.000	.000	.000	.0
	Turkey	.113	.000	.000	.000	.008	.001	.000	.000	.000	.0
	UAE	.317	.000	.000	.000	.110	.009	.000	.000	.000	.0
	Yemen	.000	.000	.000	.000	.007	.012	.000	.000	.000	.0

Appendix 4

The results of the analysis first round of Delphi exercise are as follows:

1. When making a travel decision how important do you think the risk averseness is of the traveller?

← Very important | Not important at all →

5	4	3	2	1
17.9%	57.1%	17.9%	7.1%	0%
12%	68%	12%	8%	0%
8.7%	69.9%	13%	8.7%	0%

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

2. When making a travel decision how important do you think is the specific destination in determining the level of risk perceived?

← Very important | Not important at all →

5	4	3	2	1
64.3%	32.1%	3.6%	0%	0%
64%	28%	8%	0%	0%

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

3. What do you think concerns travellers most? Risk of physical harm? Risk of financial loss? Risk of not being satisfied by their destination choice? **Please rank them** in the order in which you perceive their relative importance.

	1	2	3
Risk of physical harm	71.4%	21.4%	7.1%
	76%	12%	12%
	82.6%	8.7%	8.7%
Risk of financial loss	14.3%	53.6%	32.1%
	8%	60%	32%
	8.7%	56.5	34.8
Risk of not being satisfied by their destination choice	14.3%	25%	60.7%
	16%	24%	60%
	8.7%	30.4%	60.9%

Can I ask you to answer this question again in the boxes below and briefly comment why you give it the ranking that you do?

	First round	Second round	Third round
Risk of physical harm			
Risk of financial loss			
Risk of not being satisfied by their destination choice			

Your comment here:

4. Do you think that the relative importance of each type of risk discussed in Q.3 varies according to the region of the world from which the traveller originates?

Yes	No
88.9%	11.1%
91.7%	8.3%

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you have answered in this way?

Your comment here:

5. Do you think that the age of the traveller will influence their level of travel-risk averseness?

← Influence strongly no influence at all →

5	4	3	2	1
42.9%	39.3%	17.9%	0%	0%
36%	56%	8%	0%	0%

Last round you answered 4. Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

6. Using your thoughts about age and risk averseness, please **rank the following age groups 1 to 6** where 6 is the most risk averse and 1 is the least risk averse

Age	6	5	4	3	2	1
	(%)	(%)	(%)	(%)	(%)	(%)
a) 18<	11.5	11.5	15.4	7.7	7.7	46.2
a) 18<	8.7	13	17.4	4.3	4.3	52.2
b) 18 - 29	3.8	7.7	3.8	3.8	50	30.8
b) 18 - 29	9.7	3.4	8.7	0	56.5	21.7
c) 30 - 39	0	3.8	23.1	46.2	23.1	3.8
c) 30 - 39		8.7	21.7	52.2	13	4.3
d) 40 - 49	8	4	40	32	0	8
d) 40 - 49	8.3	4.2	45.8	33.3	4.2	4.2

e) 50 - 59	0	61.5	15.4	7.7	7.7	7.7
e) 50 - 59	0	60.9	8..7	8.7	13	8.7
f) 60+	70.4	7.4	7.4	7.4	7.4	7.4
f) 60+	70.8	4.2	4.2	4.2	8.3	8.3

Can I ask you to answer this question again in the boxes below and briefly comment why you give it the ranking that you do?

Age	Previous answer	New answer
a) 18<		
b) 18 - 29		
c) 30 - 39		
d) 40 - 49		
e) 50 - 59		
f) 60+		

Your comment here:

7. Can you estimate the relative levels of risk averseness exhibited by the different genders?

← High Risk Averseness Low Risk Averseness →

Gender	5	4	3	2	1
Male	0%	16.7%	50%	29.2%	4.2
Male 2	0%	19%	52.4%	23.8%	4.8%
Male 3	0%	11.1	61.1	27.8	0
Female	25%	58.3%	16.7%	0%	0%
Female	19%	57.1%	23.8%	0%	0%
Female 3	11.1%	66.7%	22.2%	0%	0%

Can I ask you to answer this question again in the boxes below and briefly comment why you give it the score that you do?

Gender	Previous answer	new answer
Male		
Female		

Your comment here:

8. How important do you think previous negative experience is in determining the level of risk averseness?

← Very important Not important at all →

5	4	3	2	1
42.9%	46.4%	3.6%	7.1%	0%
52%	44%	0%	4%	0%

Last round you answered 2. Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

9.Do you think that the nature of the occupation of the traveller is likely to influence their level of travel risk averseness?

← **Influence strongly** **No influence at all** →

5	4	3	2	1
7.1%	39.3%	32.1%	17.9%	3.6%
8%	56%	20%	12%	4%

4.3%	60.9%	17.4%	13.0%	4.3%

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

10.Do you think that the level to which the traveller has been educated is likely to influence their level of travel-risk averseness?

← Influence strongly **No influence at all →**

5	4	3	2	1
17.9%	64.3%	14.3%	3.6%	0%
16%	80%	0%	4%	0%
30.4%	65%	0%	4.3%	0%

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

11.Do you think the country from which the traveller originates is an important influence on their level of travel-risk averseness?

← Influence strongly **No influence at all →**

5	4	3	2	1
28.6%	39.3%	25%	3.6%	3.6%
28%	56.0%	12%	0	4%
21.7%	65.2%	8.7%	0	4.3%

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

12. How important do you think a traveller's religious affiliation is to their level of travel-risk averseness?

← **Very important** **Not important at all** →

5	4	3	2	1
3.7%	29.6%	40.7%	18.5%	7.4%
11%	24%	50%	12%	4%
0%	21.7	65.2	13%	

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

13. Do you think people are more travel-risk averse if they travel on their own rather than with a party/family **Yes……or No……?**

Yes	No
57.7%	42.3%
52%	48%
50	50

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you answer the way that you do?

Your comment here:

14. Do you think people are more travel-risk averse if they are travelling to a different region of the world rather than travelling within their own region?
Yes..... or No .....?

Yes	No
92.6%	7.4%
96%	4%

Last round you answered. Can I ask you to answer this question again in the boxes above and briefly comment why you answer the way that you do?

Your comment here:

15. Do you think there is a high correlation between the level of travel-risk perception and the actual levels of risk **Yes..... or No .....?**

Yes	No
50%	50%
40%	60%
39.1%	60.9%

Last round you answered. Can I ask you to answer this question again in the boxes above and briefly comment why you answer the way that you do?

Your comment here:

16.In your opinion is the level of travel-risk greater now than it was 10 years ago? Does the region in which the destination is located affect your answer?

← Much greater than 10 years ago **Much less than 10 years ago →**

5	4	3	2	1
14.3%	39.3%	39.3%	7.1%	0%
12%	48%	32%	8%	0%
8.7%	60.9%	21.7%	8.7%	0%

Last round you answered. Can I ask you to answer this question again in the boxes above and briefly comment why you give it the score that you do?

Your comment here:

17.Does the region in which the destination is located affect your answer
Yes …… or No…… ?

Yes	No
88%	12%
92.6%	7.4%

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you answer the way that you do?

Your comment here:

18.Do you think people are more concerned about travel-risk related to acts of terrorism and political unrest than they are about travel-risk related to natural disasters **Yes….. or No…..?**

Yes	No
88%	12%
100%	0%

Last round you answered . Can I ask you to answer this question again in the boxes above and briefly comment why you answer the way that you do?

Your comment here:

19.What do you think is the greatest single type of event that generates travel-risk averseness (e.g. Accidents, Crime, Disasters, Health, Terrorism etc).

Political (mainly terrorism)	Health	Finance	Crime
57.5%	7.7%	7.7%	20.9%
75%	4.2%	0%	02.85
77.3	4.4%	0%	18.2%

Last round you answered Political. Can I ask you to answer this question again in the boxes above and briefly comment why you answer the way that you do?

Your comment here:

20. Please order the following regions from 1 to 6 according to the level of overall perceived risk eg. Allocating "1" to the region with the highest perceived risk, "2" to the country with the second highest perceived risk and so on to "7" which is the region with the lowest perceived overall risk.

Region	**7**	**6**	**5**	**4**	**3**	**2**	**1**
%							
Africa	0	9.1	4.4	4.5	27.3	31.8	22.7
Africa	0	9.5	4.8	4.8	33.3	28.6	19
North Americas (USA and Canada)	22.7	36.4	18.2	9.1	4.5	9.1	0
North Americas (USA and Canada)	23.8	42.9	9.5	9.5	4.8	9.5	0
Latin America	0	0	27.3	18.2	27.3	27.3	0
	0	0	23.8	28.6	14.3	33.3	0
Europe	50	31.8	9.1	0	0	4.5	4.4
	47.6	33.3	9.5	0	0	4.8	4.8
East Asia	4.5	4.1	36.4	27.3	22.7	0	0
	9.5	4.8	42.9	28.6	14.3	0	0
South Asia	4.5	9.1	13.6	40.9	22.7	9.1	0
	4.8	9.5	9.5	33.3	38.1	4.8	0
Middle East	4.5	4.5	9.1	4.5	0	13.6	63.6
	4.8	4.8	4.8	4.8	0	14.3	66.7

Add any comment you may wish to make:

21 – Please list what you see as the major types of risks associated with each of the following regions

1 = Crime 2 = Political unrest 3 = Natural disasters

4 = Health risks (disease, epidemic) 5 = Terrorism 6 = Cultural barriers.

Region	crime	Political unrest	Natural disaster	Health risk	Terrorism	Cultural barriers
%						
Africa	63	54.2	16.7	83.3	16.7	4.2

Africa2	63.6	59.1	18.2	81.8	22.7	4.5
North America	79.2	4.2	8.3	0	20.8	4.2
North America2	81.8	4.5	9.1	4.5	18.2	4.5
Latin America	95.8	50.0	16.7	33.3	16.7	16.7
Latin America2	100	52.4	19	33.3	14.3	19
Europe	58.3	4.2	4.2	0	33.3	8.3
Europe2	68.2	4.8	4.8	0	31.8	4.5
East Asia	37.5	25.0	29.2	33.3	16.7	37.5
East Asia2	40.9	29.2	27.3	36.4	18.2	36.4
South Asia	39.1	43.5	43.5	47.8	39.1	14.3
South Asia2	42.9	47.6	47.6	52.4	38.1	18.2
Middle East	18.2	77.3	9.1	22.7	86.4	40.9
Middle East2	23.8	76.2	9.5	23.8	90.5	38.1

Add any comment you may wish to make:

Appendix 5 Delphi panel

No	Who said yes	First round	Second round	Third round
1	Bill Gartner	Bill Gartner	Bill Gartner	Bill Gartner
2	Bob McKercher	Bob McKercher	Bob McKercher	Bob McKercher
3	Brian Archer	Brian Archer	Brian Archer	Brian Archer
4	Bruce Prideaux	Bruce Prideaux	Bruce Prideaux	Bruce Prideaux
5	Cathy Palmer	Cathy Palmer	Cathy Palmer	Cathy Palmer
6	Chris Cooper	Chris Cooper	Chris Cooper	Chris Cooper
7	Chris Ryan	Dallen Timothy	Dallen Timothy	Dallen Timothy
8	Dallen Timothy	David Duval	David Duval	David Duval
9	Darya Maoz	Dimitri Ioannides	Dimitri Ioannides	Dimitrios Buhalis
10	David Duval	Dimitrios Buhalis	Dimitrios Buhalis	Geoff Wall
11	Dimitri Ioannides	Geoff Wall	Geoff Wall	I-Ling Kuo
12	Dimitrios Buhalis	Heba Aziz	I-Ling Kuo	Jafar Jafari
13	Geoff Wall	I-Ling Kuo	Jafar Jafari	John Tribe
14	Heba Aziz	Jafar Jafari	John Tribe	Ken Male
15	I-Ling Kuo	John Tribe	Ken Male	Kit Jenkins
16	Jafar Jafari	Ken Male	Kit Jenkins	Larry Dwyer
17	John Tribe	Kit Jenkins	Larry Dwyer	Michlael Riley
18	Ken Male	Larry Dwyer	Michlael Riley	Mirian Rejowski
19	Kit Jenkins	Metin Kozak	Mirian Rejowski	Natan Ureilly
20	Larry Dwyer	Michlael Riley	Natan Ureilly	Simon Hudson
21	Metin Kozak	Mirian Rejowski	Peter Dieke	Stephen Wanhill
22	Michael Hitchcock	Natan Ureilly	Simon Hudson	Tim Coles
23	Michlael Riley	Peter Dieke	Stephen Wanhill	Trevor Atherton
24	Mirian Rejowski	Peter Schofield	Tim Coles	
25	Natan Ureilly	Simon Hudson	Trevor Atherton	
26	Nevenka Cavlek	Stephen Wanhill		
27	Peter Dieke	Tim Coles		
28	Peter Mason	Trevor Atherton		
29	Peter Schofield			
30	Rene Baratje			
31	Simon Hudson			
32	Stephen Wanhill			
33	Tim Coles			
34	Trevor Atherton			
35	Xavia Font			