Destination Competitiveness: The Perceptions of Foreign Tourists Visiting Qatar

Ali Salman Saleh, Saif Alsowaidi, Ghialy Yap and Shrabani Saha*

Ali Salman Saleh*, Department of Finance and Economics**,** College of Business and Economics, Qatar University**,** P.O. Box: 2713, Doha, Qatar**.** E-mail: asaleh@qu.edu.qa; Tel: +974 4403 7763

Saif Alsowaidi, Department of Finance and Economics**,** College of Business and Economics, Qatar University**,** P.O. Box: 2713, Doha, Qatar**.** Tel: +974 4403 3673, Email: s.alsowaidi@qu.edu.qa

Ghialy Yap, School of Business and Law**,** Edith Cowan University**,** 270 Joondalup Drive**,** Joondalup WA 6027, Australia**,** Tel: +61 8 6304 5749, Email: c.yap@ecu.edu.au

Shrabani Saha, Lincoln International Business School, University of Lincoln, David Chiddick Building, Brayford Pool, LINCOLN, LN6 7TS, United Kingdom, Tel: + 44-1522835547, E-Mail: ssaha@lincoln.ac.uk

Corresponding author: E-mail: ssaha@lincoln.ac.uk

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Abstract

This paper aims to develop an evidence-based integrated model for destination competitiveness and apply it to the case of Qatar, such that it could be used to identify relevant determinants and rank their contributions to tourism performance in Qatar based on survey data for foreign tourists' perceptions of the country. Various statistical methods were used to categorize the relevant constraints and the key determinants of tourism performance in Qatar. The results reveal that the highest-ranked determinants concerned core resources, particularly heritage-based artistic and architectural features, historic sites, and traditional arts and culture. In contrast, natural resources—such as national parks, wildlife, and nature-based activities—were ranked relatively low as determinants. This paper presents fresh insights into the competitiveness of Qatari tourism from visitors' perspectives, and this may inform strategies for improving the country's level of tourism competitiveness.

1. Introduction and Literature Review

The Qatar National Tourism Sector Strategy 2030 acknowledges the pivotal role that tourism plays in promoting Qatar's international image and economic growth (Qatar National Tourism Council [QNTC], n.d.). Qatar's tourism is currently ranked 51 out of 140 countries based on its competitiveness as a touristic destination in the Travel and Tourism Competitiveness Index 2019. What is more, the travel and tourism sector contributed 9.1% of GDP and 11.8% of total employment to the Qatari economy in 2019 (World Travel and Tourism Council, 2020). Ozturk and Maryam (2021) investigated the contribution of tourism to economic performance in Qatar based on the tourism growth hypothesis, and they found that tourism has a significant stimulating effect on long-term economic growth, so they recommended investment strategies to further develop Qatar's tourism industry.

Recent events, such as the blockade that was imposed on Qatar from June 2017 to January 2021 and the COVID-19 pandemic, have hampered the growth of the tourism sector in Qatar (Yap et al., 2020). With regard to the blockade, however, the country demonstrated effective crisis management and steadily recovered due to a number of strategies, such as facilitating visas and investment. Consequently, Qatar has become the most visa-open economy in the Middle East region (World Tourism Organization, 2019). In addition to these challenges, the country faces growing competition for tourists from nearby countries, such as Oman, Saudi Arabia, and Turkey. Nazmfar et al. (2019) performed a comparative analysis of the Travel and Tourism (T&T) competitiveness indices among the Middle East countries, with Qatar being placed in the high competitiveness group for tourism policy. Qatar, along with the United Arab Emirates (UAE), also displayed the strongest performance and improvement in tourism over the 2015–2017 period. Furthermore, Qatar is a relatively new arrival to the tourism industry of the MENA region (Saleh el at., 2021), so ranking destinations based merely on competitive advantage is insufficient to accurately indicate tourism competitiveness. This study therefore

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proposes an evidence-based integrated model for destination competitiveness and applies it to the case of Qatar.

Kaplanidou et al. (2016) examined whether hosting the 2022 FIFA World Cup will change perceptions of Qatar's image as a destination and the country's character in the US tourism market. Their research revealed that in the US market, awareness of the World Cup finals enhance the perceptions of Qatar as a politically stable and wealthy country to visit. Motivated by this work by Kaplanidou et al. (2016), the present study set out to explore travelers' perceptions of Qatar as a tourist destination. Research into the travel motivations of tourists visiting Qatar is limited, and there is a research gap in terms of empirical frameworks (Yap et al., 2020). Nevertheless, understanding these motivations is important because it will allow marketers to recognize ways to influence how tourists perceive Qatar as a travel destination. In addition, according to Saleh et al. (2021), only very limited studies have examined the tourism sectors of Qatar and other GCC countries. There is therefore a pressing need for more studies in this area, especially given that the country has invested heavily in tourism-related infrastructure ahead of the FIFA World Cup finals in 2022.

The present paper seeks to fill the abovementioned research gaps by providing new theoretical and empirical research for the tourism literature, especially for Qatar and the wider GCC region. We therefore introduced, for the first time, an evidence-based integrated model for destination competitiveness and applied it to Qatar. This paper also introduces new constructs for tourism determinants and adapts them to Qatar. To achieve this, a survey questionnaire was developed that sought to capture tourists' experiences of Qatar. The results presented in this paper are therefore based on survey data for 300 respondents, who were foreign travelers to Qatar. These data were collected during a very restrictive period that included both the blockade and the COVID-19 pandemic, which clearly presented challenges.

The remainder of this paper is organized as follows: The model for destination competitiveness is introduced in Section 2, while Section 3 explains the survey methodology. Section 4 then presents the results of the empirical analysis before Section 5 summarizes the study's findings and offers some policy recommendations.

2. A Model for Destination Competitiveness: Theoretical Framework

According to Crouch (2011), many stakeholders influence a visitor's experience, such as tourism-related firms (e.g., hotels, tour operators, airlines, etc.), supporting industries (e.g., the arts, recreation, entertainment, sport, etc.), destination-management institutions (private or/and public partnerships), local residents, and government agencies (e.g., tourism councils and organizations). It is vital to analyze how these players affect the competitiveness of a tourist destination and their strengths and weaknesses. Indeed, models that encompass key indicators to measure a country's destination competitiveness have been gaining traction lately. A well-developed model of destination competitiveness would be highly beneficial for tourism stakeholders (both private and public) in order to identify opportunities, analyze their strengths and weaknesses, and counter potential threats (Zehrer and Hallmann, 2015). One such widely adopted model for destination competitiveness was developed by tourism researchers Dwyer

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and Kim (2003), who adopted elements from the tourism destination management framework developed by Crouch and Ritchie (1999) as the main elements of their comparative model.

In addition, they included demand conditions as attributes of a destination's competitiveness. This model has since been empirically applied to assess the competitive advantage of several countries, including Korea (Kim and Dwyer, 2003), Australia (Dwyer et al., 2003), Slovenia (Rcef, 2004), Brazil (Ritchie and Crouch, 2010), and Oman (Al-Masroori, 2006), among others. These studies employed surveys that targeted tourism operators, suppliers, and other stakeholders in order to empirically analyze competitiveness using this model. From a demand perspective, however, Reisinger, Michael and Hayes (2019) applied this model to study the UAE's competitiveness as a destination from travelers' perspectives. Similarly, tourism-based destination competitiveness has been examined for Taiwan (Chen et al., 2016), West Virginia (Zhou et al., 2015), and regional Turkey (Caber et al., 2012).

Due to its popularity in applied research, the present study also adopted the Dwyer–Kim model (see Figure 1) to evaluate the competitiveness of Qatar as a tourist destination, with the key determinants for the model being as follows:

1. Inherited/endowed resources;
2. Created resources;
3. Supporting factors and resources;
4. Destination management;
5. Situational conditions; and
6. Demand conditions.

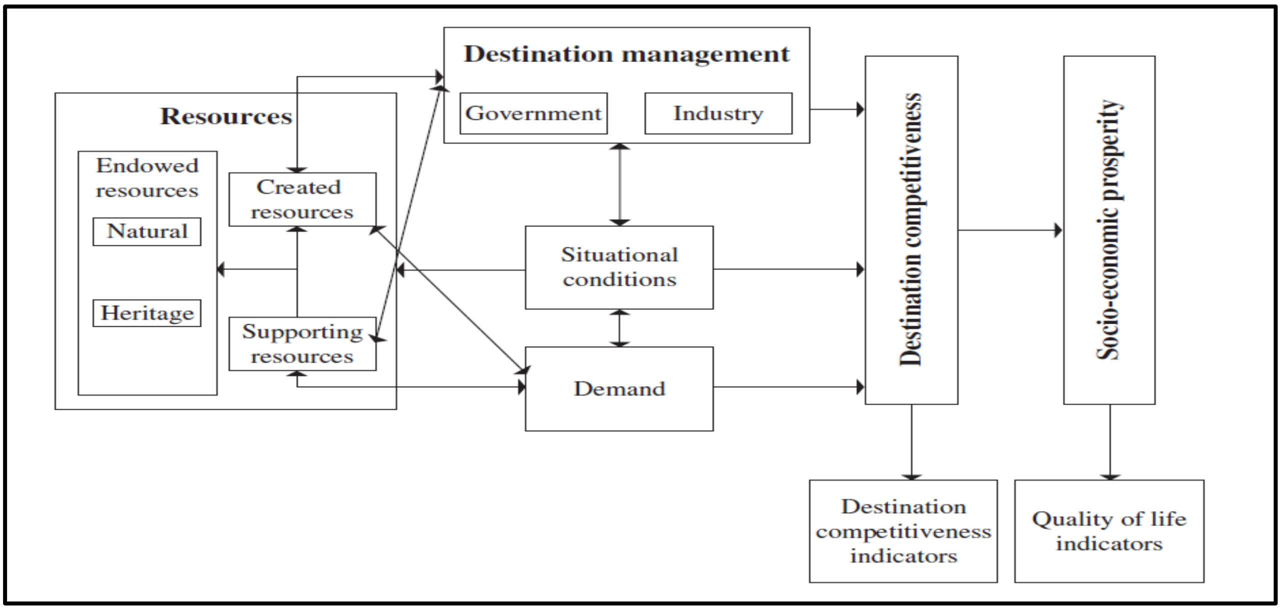

Figure 1. The Dwyer–Kim integrated model for destination competitiveness.

Source: Vanhove (2011, p. 177).

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The core resources (endowed and created) and the supporting resources are the primary factors underpinning a destination's competitiveness, although their level of significance varies for different destinations (Crouch, 2011).

Endowed/inherited resources can be classified into two types, namely natural (e.g., climate, beaches, flora, fauna, etc.) and cultural/heritage (e.g., arts, customs, cuisine, literature, language, historic sites, etc.).

Created resources, meanwhile, include things like tourism infrastructure, recreational facilities, transportation, festivals, shopping activities, and so on.

Supporting factors and resources are features that can add further value to a visitor's experience, such as service quality, destination accessibility, level of hospitality, general infrastructure, and so on (Enright and Newton, 2004).

Destination management manifests through attributes that amplify the appeal projected by the core resources and improve the effectiveness of the supporting factors. This could include interventions by destination-management agencies (both public and private), government policies, human-resource development, and environmental regulations (Dwyer et al., 2020).

Situational conditions, meanwhile, represent the external forces that influence perceptions of the tourism destination. They could include the political, economic, legal, social, and cultural situation of a country, and they may have a positive or negative influence on the behavior of tourism stakeholders (Omerzel, 2006).

Demand conditions comprise three main elements that heavily influence tourism demand, namely awareness, preferences, and perceptions. Awareness can be cultivated through promotional activities and branding, with an example of this being the portrayal of Qatar as a sporting hub. The image of a country as a tourist destination influences perceptions and subsequently attracts tourism inflows (Morakabati, Beavis and Fletcher, 2014). Tourists' preferences and motives ultimately shape the type of tourism-based products and services that should be developed in an economy.

The competitiveness indicators under each of these categories are not uniformly applied to all destinations, because each set will be specific to the particular characteristics of the tourist destination. For example, the selected factors and sub-factors can vary based on the level of economic development and destination status (Porter, Schwab and Sachs, 2004), because these indicators are indeed relative. Crouch (2011) conducted a rigorous study to determine and rank the most significant attributes based on surveying destination managers and tourism researchers. Their responses were analyzed using the analytic hierarchy process, where a series of thirty-six factors and sub-factors were measured and ranked. Even though such a study is subject to distortion and bias, these factors have been widely applied to empirically investigate tourist destinations. The sub-factors relating to each factor have since been further developed by the World Economic Forum and broadly measured using the Travel and Tourism Competitiveness Index (Crotti and Misrahi, 2015). Currently, these indices are often empirically applied in studies of destination competitiveness and used to annually rank the destination competitiveness of 141 countries. This study therefore also employs these indicators for the case of Qatar.

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3. Survey Methodology

3.1. The Survey Instrument and Data Collection

Based on the model, an extensive survey questionnaire was developed and shared with several business partners to solicit their feedback. The objective of this survey was to assess the destination's attractiveness from the perspective of visitors. This survey instrument was underpinned by a set of competitiveness indicators for each key determinant. It should be noted, however, that all these competitiveness indicators cannot be uniformly applied to all destinations, so each needs to pertain to the specific characteristics of the tourist destination. As these indicators are relative, Crouch (2011) conducted a rigorous study to determine and rank the most significant attributes based on a survey of destination managers and tourism researchers. As mentioned in the previous section, their responses were analyzed using the analytic hierarchy process, where a series of 36 factors and sub-factors were measured and ranked. Of course, this study was still subject to distortion and bias, but these factors have been widely adopted by tourism researchers (Dwyer et al. 2004; Omerzel, 2006; Crouch, 2011), so the present study also employs these indicators for the case of Qatar. In order to obtain a clear assessment of the respondents' perceptions, the determinants were decomposed and grouped into nine categories: 1) endowed resources (natural), (2) endowed resources (heritage), (3) created resources, (4) supporting resources, (5) destination management, (6) situational conditions I: politics and regulations, (7) situational conditions II: business environment, (8) situational conditions III: business competitiveness, and (9) demand conditions.

The target population comprised foreign adults (aged 18 or above) who had travelled to Qatar at least once in the last seven years (2014–2020). The survey was conducted over a period of six months from May 2020 to October 2020. The main challenge to collecting the data was the COVID-19 pandemic, which, we believe, has resulted in relatively low response rates. Consequently, a range of different strategies were employed to collect the data. This included reaching out to tourism-related businesses and agencies, such as travel agents, in order to collect the email contact details of foreign travelers and other personal contacts. The survey received 300 responses from past tourists, although as we said earlier, we believe COVID-19 has negatively impacted the response rate.

The survey questionnaire included a cover letter together with questions pertaining to demographic information about the respondents. Furthermore, respondents were asked to rate each of the competitive sub-indicators on a five-point Likert scale, with the options being not applicable (0), well below average (1), slightly below average (2), average (3), good (4), and excellent (5). There was then a further section to analyze the perceptions of visitors travelling to Qatar for business purposes.

To reiterate, the main aim of this study was not to rank Qatar against other competitive destinations but rather to ascertain Qatar's inherent strengths and weakness as a tourist destination.

3.2. Sample Characteristics

The survey population was characterized by analyzing the frequency distribution of the survey's respondents. As illustrated in Figure 2, there was a relatively even distribution of male (47%) and female (51.70%) respondents, minimizing the possibility of gender bias. Furthermore, Figure 3 shows the age-group distribution of the respondents, with young adults aged 18–24 and 25–34 representing most of the participants.

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Figure 2: Gender

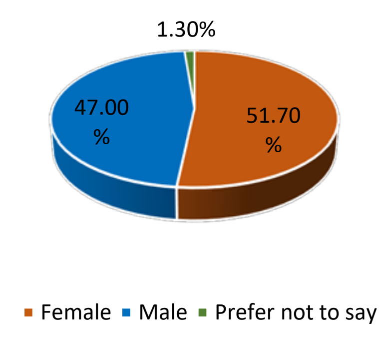
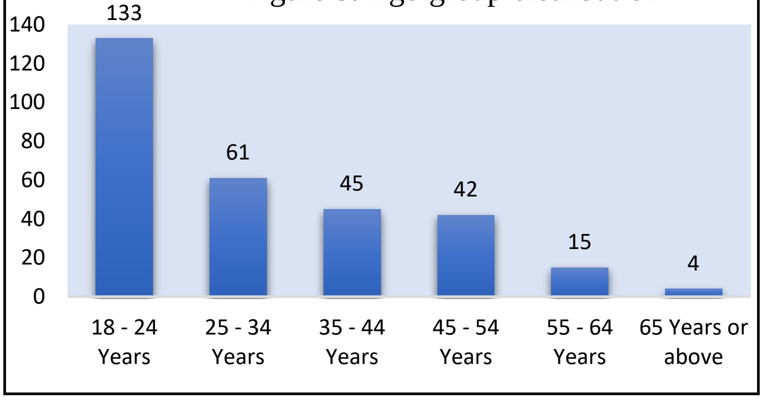


Figure 3: Age-group distribution



In terms of marital status (Figure 4), there was a healthy proportion of married (53%), single (39%), and undisclosed (8%) respondents. Regarding the education level of the survey respondents (Figure 5), a high proportion had a tertiary-level education. Indeed, of the 300 participants, 38% had completed a postgraduate degree or above, 32% had completed a four-year university degree, and 22% had studied, or were studying, in the second or third year of college.

Figure 4: Marital status

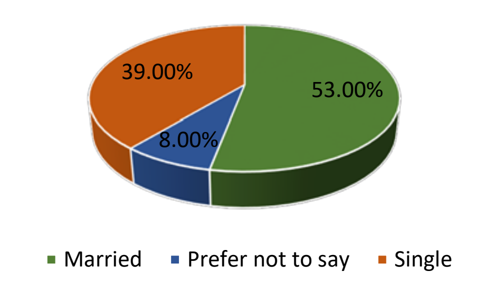


Figure 5: Education level

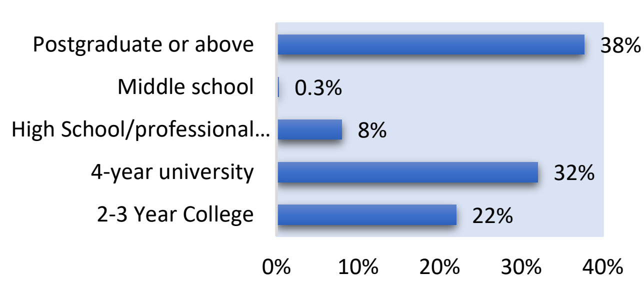


Figure 6 shows the distribution for the number of times the respondents had visited Qatar. Interestingly, 45% of the respondents had visited Qatar five times or more. This was followed by those who had visited three times (17%), once (16.30%), twice (13.30%), and four times (7.7%). This implies that most respondents had ample experience of visiting Qatar and were therefore qualified to express opinions about its tourism competitiveness. Furthermore, when asked what was the best time to visit Qatar (Figure 7), a staggering 90.3% of respondents said during the winter (October to April), with only 9.7% saying during the summer (May to September). This coincides with low levels of humidity and a pleasant overall climate in Qatar.

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Figure 6: No. of visits to Qatar

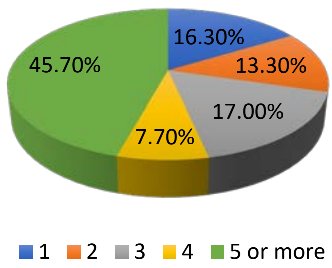
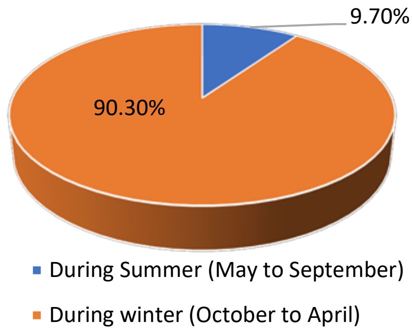


Figure 7: Best time to visit Qatar



An important element to consider is travelers' motives for visiting Qatar, and this is represented in Figure 8 below. About 40% of participants said they were visiting friends and relatives in Qatar, 26% were on holiday, 10% were attending conferences, 11% went for business purposes, and 8% said it was a working holiday. The remaining participants stated they were visiting for sports, education, or other purposes, with the latter being relatively few in number. The high percentage of travelers coming to the country to visit friends and relatives can likely be attributed to the large expatriate population in the country (Saleh, Bassil and Safari, 2021). Almost half of respondents (48%) expressed that they were considering visiting Qatar again once a vaccine for COVID-19 becomes available. As the survey was conducted between May and October 2020, just before the success of vaccine trials was announced, this reflects people's perceptions of travelling for tourism in light of the COVID-19 pandemic and the effect it had on the sector.

Figure 8: Purpose of visiting Qatar

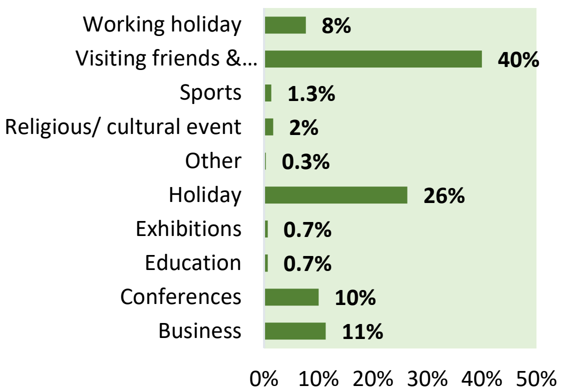
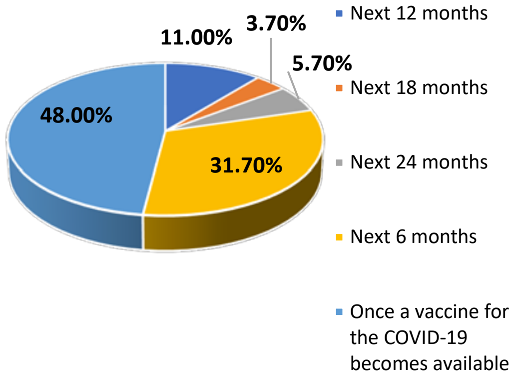


Figure 9: When would be the next visit to Qatar?



4. Empirical Analysis

4.1. Descriptive Statistics

The survey participants' ratings for Qatar's competitive indicators are ranked below. Mean and standard deviations for each of the grouped sub-categories were calculated and presented in ascending order. The determinant with the smallest mean score within each group is displayed first, indicating that it has a lower rating relative to the other determinants within the same group. It should be noted that standard deviations above 1 reflect varying perceptions among

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the tourists, thus emphasizing that each visitor has a unique experience that is shaped by their preferences and motives (Crouch, 2011).

Table 1 below presents the averages and standard deviations for the attributes categorized as endowed resources, which can be classified into natural and heritage resources. The natural endowed resources of a destination reflect the core environmental system within which tourists experience a destination (Dwyer and Kim, 2003). They are critical for various forms of tourism and the overall visitor experience. Culture and heritage, meanwhile, help a destination to present a unique identity that appeals to prospective visitors (Murphy et al., 2000).

The highest ranked core resources in Qatar were mainly heritage-based ones, such as artistic and architectural features, historic sites, and traditional arts and culture. In contrast, natural resources like national parks, wildlife, and nature-based activities were ranked relatively low. This is consistent with the comparative analysis of the T&T indices for Middle East countries conducted by Nazmfar et al. (2019), which showed a negative and lower ranking for Qatar when it comes to competitiveness in natural resources. It may be argued that the limited wildlife and national parks in Qatar affect its rating, but the country's rich *Khaleeji* culture, customs, traditional songs, cuisine, and so on—as well as spectacular architectural landmarks like the Zubara Fort, Qatar National Museum, and Souq Waqif—are widely appealing to tourists, so they could be developed even further. The high standard deviations observed in the responses for both natural and heritage resources indicate that participants hold varying opinions about these attributes.

Table 1: Descriptive statistics: Endowed resources (natural and heritage)

Competitiveness indicator	Mean	Standard deviation
(Natural) National parks	3.43	1.173
(Natural) Flora and fauna (e.g., animals, natural landscapes)	3.46	1.197
(Natural) Nature-themed activities	3.47	1.327
(Natural) Attractiveness of climate for tourism	3.63	1.218
(Natural) Water-based activities	3.66	1.232
(Natural) Unspoiled nature (e.g., beaches, natural heritage)	4.04	1.141
(Heritage) Traditional arts (e.g., indigenous music, songs, dance, etc.)	4.06	1.047
(Heritage) Historic and heritage sites	4.09	1.046
(Heritage) Artistic and architectural features	4.13	1.101

Notes: n = 300, source: own calculations.

Created resources like tourism infrastructure, entertainment, and special events are critical to enhancing the appeal of a tourist destination (Mo, Howard and Havitz, 1993). The potential of special events and conferences to generate tourism expenditure has been thoroughly examined empirically. Qatar is ranked above average for indicators representing health resorts and spas and sporting and recreational facilities, but it is ranked below average for visitor accessibility to natural areas, cruises, and rural tourism (Table 2). These rankings can be explained by the fact that Qatar's capital spending is expected to be around $60 billion for projects related to the FIFA World Cup and other legacy projects. (Henderson, 2015). The relatively low rankings

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given to the above-mentioned attributes could be due to the existing green spaces and farms being in private use, so there is perhaps an untapped potential for rural and eco-based tourism. The survey results also suggest that there is untapped potential for other specialized forms of tourism, such as cruises, rural tourism, ecotourism, entertainment events, festivals, and conference tourism. The Qatari government and the Qatar Tourism Council (QTC) should therefore establish strategies to develop tourism outside of Doha (i.e., rural tourism) such as agro tourism (farm tourism), festivals outside Doha, and ecotourism. It is also important to create and provide these services efficiently and at a high level of quality.

Table 2: Descriptive statistics: Created resources

Competitiveness indicator	Mean	Standard deviation
Visitor accessibility to natural areas	3.40	1.356
Variety of cruises (cruise ships, boat rides, etc.)	3.50	1.367
Rural tourism	3.56	1.288
Ecotourism	3.60	1.202
Arts and film festivals	3.61	1.279
Adventure activities (e.g., desert safari, buggy safari, etc.)	3.65	1.301
Conference tourism	3.70	1.338
Recreation facilities (e.g., parks and children's playgrounds)	3.71	1.322
Sport facilities (e.g., golf, tennis, etc.)	3.74	1.262
Health resorts, spas	3.83	1.277

Notes: n = 300, source: own calculations.

Supporting factors undoubtedly underpin a destination's competitiveness. The general infrastructure of a destination—such as transportation, telecommunications, healthcare facilities, financial services, and hospitality services—are key supporting factors that improve tourists' overall experiences. The accessibility of a destination relates to factors like the ease of acquiring an entry visa, airport efficiency, tourist guidance, and the quality of transport links through different means (e.g., land, sea, and air) (McKercher, 1998). Qatar is ranked above average (i.e., above 3) for airport quality, food service facilities, quality of accommodation, shopping experience, tourist guidance, and information and telecommunication services, but it is ranked below average for nightlife, amusement parks, and special events (Table 3).

The high rating given to the airport efficiency is consistent with the fact that Hamad International Airport was ranked the "world's third-best airport" and "best in the Middle East" by SKYTRAX World Airport Awards 2020 (Gulf Times, 2021).

The rankings also indicate that Qatar could develop better community support for special events, and there is much room for improvement in areas like amusement/theme parks, festivals, and entertainment-based activities, all of which could also benefit local residents.

Furthermore, the low standard deviation for attributes pertaining to quality of services—such as food facilities, accommodation, shopping, and airports—indicate a high level of agreement among the respondents in ranking these factors highly.

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Table 3: Descriptive statistics: Supporting resources

Competitiveness indicator	Mean	Standard deviation
Nightlife (e.g., bars, discos, dancing)	3.18	1.664
Amusement/theme parks	3.39	1.435
Special events and festivals	3.89	1.300
Community support for special events	3.95	1.241
Entertainment (e.g., theater, galleries, cinemas)	3.98	1.221
Health/medical facilities to serve tourists	4.05	1.250
Quality of tourism services and infrastructure	4.06	1.120
Financial institutions and currency-exchange facilities	4.07	1.157
Local tourism transportation efficiency/quality/frequency	4.09	1.092
Accessibility of destination	4.14	1.004
Telecommunication systems for tourists	4.17	1.067
Tourist guidance and information	4.20	1.040
Different shopping experience (e.g., easy directions, ample choices)	4.23	.982
Accommodation (variety/quality)	4.28	.969
Food service facilities	4.43	.849
Airport efficiency/quality	4.49	.832

Notes: n = 300, source: own calculations.

Destination management helps to systemically examine the unique competitive advantages of a destination to ensure its long-term success (Hassan, 2000). It includes attributes such as human resource development, marketing and planning, and the initiatives of destination-management agencies.

When it comes to attributes that make the tourism sector more effective, cleanliness was ranked highest with a low standard deviation, indicating a high level of agreement among the respondents when rating this factor highly.

Hospitality represents the attitudes and behaviors of the local community, residents, and tourism firms toward visitors, and they contribute to a positive experience. Hospitality in Qatar was rated highly (Table 4), with Qatari residents and hospitality firms being ranked above average for friendliness, efficiency and ease of communication, and trust between residents and tourists. However, the friendliness and attitudes of customs and immigration officials were ranked comparatively lower. In general, local residents are likely to support and engage in tourism-development programs if they believe their benefits outweigh the costs (Yoon, Gursoy and Chen, 2000). The rankings therefore imply that Qataris are well aware of the benefits of developing tourism.

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Table 4: Descriptive statistics: Destination management

Competitiveness indicator	Mean	Standard deviation
Efficiency and friendliness of customs and immigration officials	3.93	1.264
Attitudes of customs and immigration officials	3.94	1.259
Destination links with major origin markets	3.94	1.280
Efficiency and friendliness of tourism/hospitality firms	4.03	1.225
Hospitality of residents toward tourists	4.16	1.080
Communication and trust between tourists and residents	4.23	1.040
Cleanliness	4.65	.709

Notes: n = 300, source: own calculations.

Situational conditions affect the performance of the tourism sector through the overall environment, thus affecting a destination's competitiveness. Both microeconomic and macroeconomic conditions need to be considered. At a microeconomic level, a thriving business environment, healthy competition among tourism-related firms, and the price of tourism products drive the quality of service. On the other hand, at the macroeconomic level, attributes like political stability, civilian safety, and human rights contribute to the identity of the destination. The affordability of the tourism experience is also significant (Gomezelj and Mihalič, 2008). This survey therefore considered three determinants that are most relevant to Qatar: political rights and regulations, business competitiveness, and the business environment. These determinants were further divided into the sub-determinants presented in Table 5 below.

Qatar is ranked above average for the security/safety of visitors (at a high level of agreement), the friendliness of local people, and political stability, but it ranks below average for freedom of movement and speech, price affordability, value for money in accommodation, and the availability of tourism programs for visitors (Table 5). This concurs with the 2019 T&T indices, which reported Qatar as having one of the five lowest homicide rates, which is in turn a sub-index for the security and safety of visitors (World Economic Forum, 2019). Das and DiRienzo (2009) investigated the relationship between tourism competitiveness and freedom of the press, which is a proxy for civil rights and political freedom. They empirically concluded that countries with a sensitive approach to civil liberties can successfully compete with open nations in the global tourism market. This suggests a need to create further attractive and innovative tourist attractions, as well as provide affordable tour packages that add value to a visitor's experience. Furthermore, attributes such as visa requirements, value for money in the destination's tourism experience, e-commerce facilities, and economic freedom are averagely ranked, implying that there is room for improvement in these factors. However, Qatar has recently made commendable improvements in its visa requirement rankings, with jumping from 119th to 3rd place in the international openness factor of the 2019 T&T indices (World Economic Forum, 2019).

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Table 5: Descriptive statistics: Situational conditions (politics and regulations, business environment, business competitiveness)

Competitiveness indicator	Mean	Standard deviation
Politics & Regulations [Civil liberty, Freedom of movement & speech]	3.64	1.516
Business Competitiveness [Prices are reasonably cheap]	3.73	1.101
Business Environment [Value for money in accommodation]	3.79	1.138
Business Environment [Existence of tourism programs for visitors]	3.85	1.192
Business Environment [Manager capabilities]	3.87	1.155
Business Environment [Value for money when shopping]	3.87	1.109
Politics and Regulations [Visa requirements impeding visitation]	3.89	1.276
Business Environment [Value for money in destination tourism experiences]	3.91	1.078
Business Environment [Use of e-commerce, including e-banking]	3.95	1.255
Politics and Regulations [Economic freedom in allowing competition to supply high quality, low cost goods and services]	3.97	1.257
Business Competitiveness [Easy dealings with local businesspeople]	3.97	1.107
Politics and Regulations [Political stability]	4.02	1.299
Business Competitiveness [Friendliness of local people]	4.02	1.079
Politics and Regulations [Security/safety of visitors]	4.40	.885

Notes: n = 300, source: own calculations.

Demand conditions influence travelers' motives and preferences when choosing a destination (Dwyer, Livaic and Mellor, 2003). This survey asked the respondents to rate the international awareness of Qatar and Qatar-based tourism products along with the image and identity of Qatar as a destination. Table 6 indicates that the brand image of Qatar weighed more than the awareness of the country's tourist attractions. Awareness can be created through promotional ventures, while the brand image attracts visitors based on its "fit" with tourists' preferences (Omerzel, 2006). Despite improvements in the effectiveness of marketing and branding strategies to attract tourists to Qatar (5.2/7), it still ranks relatively low among other destinations, having slipped from 30th to 33rd position (World Economic Forum, 2019).

Table 6: Descriptive statistics: Demand conditions

Competitiveness indicators	Mean	Standard deviation
Demand [International awareness of destination and products]	3.88	1.157
Demand [Destination image and branding]	4.08	.983

Notes: n = 300, source: own calculations.

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5. Conclusion and Policy Implications

This paper offers some new insights into the relevant constraints and determinants for tourism performance in Qatar, having ranked them in order to assess their impact on the competitiveness of Qatar as a tourist destination. On adopting the destination competitiveness model, a survey for tourists was developed to evaluate their perceptions about visiting Qatar. Using descriptive statistics, the mean scores of the sub-attributes were ranked to assess their relative influences on competitiveness.

Based on the empirical findings presented in this paper, we can say that Qatar is ranked above average (above 3) for the security/safety of visitors (at a high level of agreement), the friendliness of local people, and political stability, but it is ranked below average for freedom of movement and speech, price affordability, value for money in accommodation, and the existence of tourism programs for visitors. It therefore follows that some fresh tourism strategies need to be established to encourage the creation of more attractive and innovative tourist attractions, as well as affordable tour packages that add further value to a visitor's experience. What is more, the demand factor of international awareness of the destination and its products also ranked among the lowest, indicating a need to improve international awareness of Qatar as a tourism destination and promote its tourism products and services.

Since the onset of the COVID-19 pandemic, the travel and tourism sector has been one of the most affected industries in the world due to travel restrictions and other challenges. In line with this, 48% of the survey respondents stated they would consider revisiting Qatar only once a vaccine for COVID-19 becomes available. In addition, the Ministry of Planning and Statistics Authority (2020) reported a negative contribution from travel and tourism activities to the Consumer Price Index due to the global health emergency and temporary utility exemptions to this sector. It has therefore become more pressing to adapt to external shocks by effectively training those working in the tourism sector.

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