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Can this be spring? Assessing the impact of the "Arab Spring" on the Arab tourism industry

Abstract

The socio-political unrest known as the "Arab Spring" has left its imprint on the tourism sector of the Arab region. This paper explores first the effects of the Arab Spring on the macro-tourism performance of selected Arab countries, both oil and non-oil, using official tourism and macro-economic statistical data. Subsequently, it examines the policies and strategies adopted by the Arab governments in order to mitigate the evolving tourism crisis in the non-oil Arab states. Finally, it examines the relationships between the Non –oil and GCC countries with respect to the tourism trends characterizing the Arab World since the outbreak of the, so-called, Arab Spring. It concluded that the tourism "pain" of the non-oil Arab countries became the "gain" of the GCC countries, which have been perceived by both intra-regional and international tourists as safer to visit. The paper concludes with an evaluation of the future tourism prospects for both the non-oil and the GCC countries. Assuming that the socio-political unrest accompanied by safety and security threat to tourists in some of the non-oil Arab countries will prevail at least in the foreseeable future, the paper points at further research directions in order to monitor these future trends.

Key words: *Arab Spring; macro-economic tourism performance; tourism crises.*

Introduction

The Arab Spring, which broke out in late 2010, has had a tremendous impact on the tourism industry in the entire Arab region, in the non-oil and the Gulf Cooperation Council (GCC) states (Saudi Arabia, Kuwait, Bahrain, Oman, Qatar and the United Arab Emirates (UAE) alike. There are several research questions, which need to be asked regarding the consequences of this change: first, what were the effects of the Arab Spring on the tourism industry – both of the non-oil and the GCC countries alike? Second, to what extent are these effects significantly different from those associated with previous tourism crises in this part of the world (e.g. the Iraqi invasion of Kuwait in August 1990, the terrorist attacks on tourists in Egypt in November 1997, The US invasion of Iraq in March 2003? and the Second Lebanon War in the summer of 2006)? Third, are there differences in tourism consequences between oil- and non-oil Arab countries and, if so, in what way? Fourth, what crisis management strategies and tactics were adopted by the Arab governments to mitigate the consequent negative

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tourism effects? And lastly, what are the prospects for the tourism industry both in the GCC and the non-oil Arab countries in light of the continuing global economic recession on the one hand and the continuation of political instability in an increasing number of non-oil Arab countries on the other?

In accordance with the above questions, the paper proceeds with a theoretical framework drawn on nature of tourism crises in developing and developed economies. It then examines trends of the Arab tourism industry since the early 2000s and until the onset of the Arab Spring. This is followed by an examination of the effects of the Arab Spring on the tourism industry. The paper then explores the unique characteristics of the tourism crisis resulting from the Arab Spring compared to previous tourism crises in the Arab region. This is followed by an analysis of the measures taken by the Arab governments in pursuit of tourism recovery. Finally, the paper examines the future prospects of the tourism industry in the whole Arab region.

Theoretical framework: Tourism crises and their nature

The relationship between tourism and issues of safety and security has aroused considerable interest and research, especially since the mid-1980s. Since then, major incidents involving security and safety around the world have intensified this interest and brought about not only a documentation of the relationship and the magnitude of the impact on the international tourism industry, but have also sought strategies to manage and mitigate the consequences of such turbulences in tourism (Laws, 2007). In many tourism destinations, major crises in the wake of security and instability situations were rare or at least sporadic, causing limited and short-term damage to the tourism sector. However, in other places, such as Israel, Lebanon, Yemen, Lebanon or Sri Lanka, tourism crises in the wake of security and safety situations have become chronic (Mansfeld, 1999). In such circumstances, an on-going crisis management mode of operation is required, one that can deal with complex operational and marketing constraints on the destinations concerned. The cost involved in operating tourism systems in such unstable environs raises a major dilemma, asking whether tourism as an economic sector can perform profitably (Beirman, 2009).

In many countries, tourism has become one of the more prominent earners of foreign currency, a leading contributor to GDP, in some of them even double-digit figures; and, most important, the major generator of private sector employment. Furthermore, tourism in such countries has become almost the sole economic and social mechanism to reduce rapid urbanization processes and to facilitate a decent standard of living in peripheral areas. In the Arab region, this is the case in Aqaba (Jordan), Sinai and the Red Sea (Egypt) as well as in many tourist destinations in Tunisia and Morocco, all of which are totally dependent on tourism.

Hence, tourism crises in such areas, especially when they recur, may cause serious socioeconomic problems. Furthermore, tourism crises may have long-term ramifications on their competitiveness since these places can easily be replaced by non-affected destinations that offer similar tourist products (Shoukry, 2013). Thus, for example, countries such as Tunisia and Egypt that specialize in Triple-S tourism, may find it extremely hard to regain flows of tourists since these countries have been replaced by stable, secure and similarly attractive alternative destinations, namely Turkey, Greece and Cyprus (Mansfeld & Pizam, 2006).

The nature of tourism crises portrayed above make the task of overcoming them a complex and challenging endeavor. In order to better tailor the right recovery strategies for each tourism crisis, one should analyze and understand the characteristics of the security situation, the characteristics of the country's markets, the profile of the local tourism system, in addition to previously taken measures to manage and mitigate past crises in that country. These perspectives will be used here in reviewing the anatomy and the consequences of tourism crises incurred as an outcome of the Arab Spring.

This paper analyzes the tourism ramifications of the Arab Spring from a macro-economic perspective. Hence, the analysis will be using statistics collected from the official statistical authorities of the countries being researched as well as "grey" sources collected from economic newspapers, media reports and other unofficial sources. The data collected and compiled have allowed a broad view of the economic, social and political implications of the developments in the tourism industry in each country. They have also provided a regional view enabling a macro-collective analysis of the ramifications in all the analyzed countries together.

Findings and analysis

Following is presentation of the findings and analysis of the based on the secondary data collected for each reviewed state. The discussion is organized according with the research issues presented in the introduction

Trends in the Arab tourism industry prior to the "Arab Spring"

Like many other developing economies worldwide, the non-oil Arab countries started to develop a tourism sector in the 1970s, first in Egypt and Tunisia, and then expanded rapidly into other non-oil Arab countries. This trend continued steadily with only minor disruptions until the outbreak of the Arab Spring. Thus, in Tunisia, Egypt, Morocco and Jordan, the tourism industry has become the largest private sector employer and the most important earner of hard currency (Tang & Abosedra, 2014).

In the case of Tunisia, for example, in 2010 the tourism industry constituted 6.5% of the GDP and provided employment to 11.5% of the workforce (Kan, 2012; WTTC, Tunisia, 2012). The direct contribution of the tourism industry to the Tunisian economy increased from US$ 2,0 billion in 2000 to US$ 3,8 billion in 2010 (see Table 1). The success of the Tunisian tourism industry until the onset of the Arab Spring was based not only on its diverse products (from traditional "Triple-S" to desert tourism and cultural tourism focusing on archaeological sites) but also on the European-secular and permissive nature of the country – an imprint of the prolonged French colonial rule (Achy, 2012; Tunis Times, April 14, 2013).

Table 1
Direct contribution of tourism to the GDP of selected oil-and non-oil Arab countries, 2000-2014 (selected years, US$ billion, current prices)

Year /Country	2000	2004	2006	2008	2009	2010	2011	2012	2013	2014
Non-oil Arab countries (under the new regime)										
Egypt	6,702	7,381	9,651	14,448	15,504	17,505	15,023	17,710	14,473	16,548
Tunisia	1,976	2,575	3,187	4,094	3,796	3,760	3,142	3,424	3,396	3,614
Non-oil Arab countries (under the old regime)										
Jordan	0,445	0,681	0,953	1,369	1,331	1,684	1,692	2,015	2,022	2,221
Morocco	2,365	4,603	6,672	8,550	8,039	8,144	9,027	8,561	8,548	8,559
Oil-rich Arab countries										
Qatar	0,339	0,801	1,524	1,434	1,239	1,420	2,299	3,269	3,745	4,244
Bahrain	0,576	1,015	1,247	1,377	1,384	1,591	1,287	1,269	1,353	1,447
Oman	0,483	0,732	0,802	1,241	1,094	1,233	1,512	1,710	1,954	1,990
Saudi Arabia	6,284	11,135	9,751	13,759	13,898	16,454	17,008	17,523	17,388	18,242
UAE	2,975	3,830	6,982	12,635	10,627	11,823	13,521	14,862	15,856	16,762

Source: World Travel & Tourism Council.

In Egypt, also, tourism rapidly emerged as the leading industry. By 2010, the industry employed approximately 10% of the total workforce (African Development Bank, 2012). The total direct contribution of tourism to the Egyptian economy increased from $6,6 billion in 2000 to as high as $17,5 billion in 2010 (see Table 1). The combination of Egypt's unique archaeological-cultural-religious sites, its desert and ecotourism opportunities, its Red Sea scuba diving attractions, and the vast range of Triple-S sites with low-cost tourism services, all transformed Egypt into a popular tourism destination worldwide.

Since signing its peace accords with Israel (October 1994) and until the onset of the Arab Spring, Jordan's tourism industry also flourished. By 2010, the direct contribution of the tourism industry to the GDP amounted to $1,7 billion – almost four times the amount when compared to 2000 (see Table 1; Hazbun, 2002). It appears that the Jordanian National Tourism Strategy for the 2004-2010 period had succeeded and had brought the Kingdom's tourism industry to a peak (ABC Investments, 2009). In 2010, following a slight decline in 2009 as a consequence of the global economic recession, Jordan's receipts for tourism were higher than ever before, amounted to $4,39 billion (World Bank Data, International Tourism Receipts). Overall, during the 2004-2010 period, Jordan's tourism receipts increased by as much as 257% (Jordan, Ministry of Tourism and Antiquities – MTA, 2011a).

Also among the other non-oil Arab countries tourism has emerged as a leading sector, even in Syria, which until the late 1980s did little to promote this industry. Since the early 2000s, however, Syria's tourism industry rapidly expanded, particularly during the three years preceding the political unrest, which started in March 2011. In 2010, that country's tourism industry constituted approximately 12% of the GDP and was responsible for 11% of the employment opportunities (*The Daily Star*, 2012; Ibrahim & Razzouk, 2011).

In the GCC countries, with the exception of the Hajj pilgrimage in Saudi Arabia, tourism as a modern industry almost did not exist until recently. The avoidance of tourism development by these countries was mainly due to the authorities' fear of widespread illegal labor immigration (Mansfeld & Winckler, 2007). This fear was accompanied with a concern over possible negative cultural impacts as highly conservative host communities may have encountered Western, non-Muslim international mass tourists (Jafari & Scott, 2014).

This policy of avoiding the tourism sector, however, ended in Dubai and Bahrain during the 1980s, and in Oman and Abu Dhabi during the 1990s. Saudi Arabia followed in 2000 and recently also Qatar turned to a process of massive and rapid tourism development. The development of the tourism sector was part of their paramount aim to develop the non-oil sectors (Johnson, 2010). Overall, as can be observed from Tables 1 and 2, during the 2000s the tourism industry in the Arab region rapidly developed in the oil and the non-oil economies alike. Tourism performance at that time exceeded by far those of worldwide averages. It should be noted, however, that this rapid development also occurred in 2009 and 2010 despite the on-going global economic recession.

Table 2
Number of international tourist arrivals in some Arab countries, 2000-2013 (000')

Year / Country	2000	2001	2002	2003	2004	2005	2007	2008	2009	2010	2011	2012	2013
Non-oil Arab countries (under the new regime)													
Egypt	5,116	4,357	4,906	5,746	7,795	8,244	10,610	12,296	11,914	14,051	9,497	11,196	9,174
Tunisia	5,058	5,387	5,064	5,114	5,998	6,378	6,762	7,049	6,901	6,903	4,785	5,950	6,269
Non-oil Arab countries (under the old regime)													
Jordan	1,427	1,478	1,622	2,353	2,853	2,987	3,431	3,729	3,789	4,207	3,960	4,162	3,945
Morocco	4,240	4,342	4,303	4,761	5,477	5,843	7,408	7,879	8,341	9,288	9,342	9,375	10,046
Oil-rich Arab countries													
Qatar	587	557	587	557	732	913	964	1,405	1,659	1,519	2,527	1,170	–
Dubai *	–	–	4,756	4,980	5,431	6,160	6,952	7,531	7,583	8,294	9,096	9,957	9,990

*Since the Government of Dubai does not publish official data regarding the number of tourists, the number was calculated by summing up the number of guests in hotels and apartment-hotels.

– No data available.
Sources: UNWTO, Compendium of Tourism Statistics, selected years, 2000-2014, Madrid; UNWTO, Tourism Highlights, selected years, 2010-2014, Madrid; UNWTO, Yearbook of Tourism Statistics, selected years, 2010-2014, Madrid; Government of Dubai, Statistical Yearbook, selected years, 2000-2013, Dubai. Government of Dubai, Department of Tourism and Commerce Marketing (DTCM), Hotel Statistics.

The effect of the Arab Spring on the tourism industry of the non-oil Arab countries

As with other events, the reaction of the tourism industry to the onset of the Arab Spring was, simultaneously immediate and drastic. In the case of Egypt, the number of tourists declined from 13,758 million in the FY2009/10 to 10,953 million in the FY2011/12, increased to 12,213 million in the FY2012/13 and again sharply declined to 7,968 million in FY2013/14 (see Table 3). The number of tourist nights declined respectively from 142,4 million in the FY2012/13 to 72,919 million in the FY2013/14. The result of the declining number of tourists from the developed economies and the overall price reductions implemented to maintain the industry alive, led to a substantial decline in the overall tourism receipts from a peak of $11,591 billion in FY2009/10 to $9,419 billion in FY2011/12; it recovered slightly to reach $9,752 billion in FY2012/13, and sharply declined to $5,073 billion only in the FY2013/14 (Central Bank of Egypt - CBE, Monthly Statistical Bulletin - MSB, March 2015). Although during the second half of 2014, there was some recovery in Egypt's tourism performances with the number of tourists reaching 5,5 million compared to 4,5 million in the corresponding period of the previous year (CBE, MSB, March 2014, March 2015), the Egyptian tourism industry is still much below its performance prior to the Arab Spring.

Table 3
Number of international tourist arrivals in some Arab countries, 2000-2013 (000')

Year / Origin	2000/1	2001/2	2002/3	2003/4	2004/5	2005/6	2007/8	2008/9	2009/10	2010/11	2011/12	2012/13	2013/14
Europe	3,501	2,769	3,469	4,965	5,983	5,818	6,853	9,120	10,439	8,791	8,101	8,925	5,059
Ameri-cas	325	184	168	237	276	325	356	476	531	436	283	288	211
Asia and the Pacific	304	217	253	349	386	432	534	561	652	560	374	441	243
Middle East	1,070	1,025	1,1179	1,736	1,743	1,834	1,697	1,666	1,635	1,636	1,739	2,094	1,071
Africa	145	144	168	221	258	280	342	428	462	482	434	438	365
Other	2	2	2	4	4	4	6	28	39	26	22	27	19
Total	5,347	4,341	5,239	7,512	8,650	8,693	9,788	12,293	13,758	11,931	10,953	12,213	7,968

Sources: Central Bank of Egypt, Monthly Statistical Bulletin, 2002-2015, selected issues, Cairo.

The most severe impact of the Arab Spring on the tourism industry was on that of Tunisia. This was due mainly to the national composition of its tourists, made up mainly of Europeans and Libyans. Thus, Tunisian tourism receipts in 2011 declined by as much as one-third compared to 2010 (Central Bank of Tunisia - CBT, 2012; *Freedman, 2012*). Only 3 million tourists visited Tunisia in 2011, in contrast with more than 7 million in each of the three years preceding the collapse of the Ben 'Ali regime (Achy, 2012). In 2012, similar to Egypt, the Tunisian tourism activities also recovered considerably with a 33% increase in their revenue from tourism compared to 2011 (UNWTO, 2013a; CBT, 2013). However, in 2013 the Tunisian tourism industry had already fallen back into stagnation following the murder of Chokri Belaid on February 6, as well as attacks by some Islamist fundamentalists on tourist sites, such as in Hergla, in early April 2013 (Saidani, 2013; Tunis Times, 2013).The deterioration in the Tunisian tourism figures continued in 2014 as well: according to Tunisian data, from January 1, until December 20, Tunisia hosted 5,9 million tourists, representing a decline of 2.8% compared to the corresponding period of the previous year and a decline of as much as 12% compared to 2010 (Agence Tunis Afrique Presse, January 8, 2015).

In Jordan as well, despite the survival of the Hashemite regime, the Arab Spring brought about a sharp decline in tourism activities. This was because a large segment of the Jordanian tourism industry is made up of regional tours. In 2011, Jordan's tourism receipts declined by 16.3% compared to 2010 (Jordan, MTA, 2011b) while the number of tourist arrivals fell by 22% (EBRD, 2012). In 2012, the number of hotel nights increased by 5.1% compared to that of 2011 (Arabian Travel Market, February 10, 2013), while the total income from tourism increased by as much as 13.5% (Bank Audi, 2013). The slight recovery of the Jordanian tourism industry, as that of Egypt and Tunisia, was largely a result of declining prices as well as the widespread feeling that from then on the security situation would improve. This, however, never materialized and in both 2013 and 2014 the Jordanian tourism activities "continued to hobble" with the number of tourists in 2014 amounting to 3.1 million, while the tourism receipts declined by more than 20% compared to 2012 (Jordan, MTA, 2013, 2014).

In the case of Syria, since mid-2011 the tourism industry, which had enjoyed relative prosperity in the three years preceding the outbreak of the civil war, totally collapsed. In early 2012, the Syrian civil war has been spilling over into Lebanon. Thus, while in 2010 a record of 2,168 million international tourists visited Lebanon, their number fell to 1,656 million in 2011and dropped further to 1,366 million in 2012. This decline continued in 2013 with the number of tourists reaching some 1,274 million only, namely a fall of 41% compared to the number in 2012 (Lebanon, Ministry of Tourism, 2011, 2012, 2013). The main reason for the deterioration in Lebanon's tourism is the political instability both in Lebanon itself and in neighboring Syria (MEED, 2013 Economic Review, 2013). Travel advisories, particularly those issued by the GCC authorities, warning citizens to avoid visiting Lebanon, were the final deathblow to the Lebanese tourism industry (Al-Jazeera, 2013).

Morocco is the only exception among the non-oil Arab countries regarding its tourism industry in light of the Arab Spring. In 2011, Morocco was the only non-oil Arab country whose tourism industry not only emerged unharmed, but even slightly improved (MedPro**,** 2013), while the direct contribution of the tourism industry to its GDP amounted to 8.9% (Bouzahzah & El Menyari, 2013). In 2012, the Moroccan tourism industry continued to expand, but again at a very slow pace. In 2013, as seen in Table 2, the number of tourists in Morocco amounted to more than 10 million – higher than ever before. The expansion of the Moroccan tourism industry continued in 2014 as well, with the number of tourists reached 10,280 million, an increase of 4.2% compared to 2013 (Morocco World News, February 6, 2015).

Why is the crisis following the Arab Spring unique?

Historically, only two types of major tourism crises have occurred in the Arab region prior to the Arab Spring. The first was the result of attacks on tourists by Islamic fundamentalist terrorists. Such attacks took place at least once in almost all Arab countries – except for the GCC countries. In Egypt, for example, such events occurred in Luxor in November 1997 and again in October 2004 in the Hilton Hotel in Taba as well as in April 2005 in Cairo. Another example is Jordan where, in a coordinated operation, three hotels in Amman (the Radisson SAS, the Grand Hyatt and the Days Inn) were attacked simultaneously on November 9, 2005. These attacks, like all the others, targeted the "soft under-belly" of these regimes. Not only did they significantly damage the most lucrative private sector, they also humiliated the regimes in question by exposing their failure to maintain high effective levels of security. The second type of tourism crisis was induced by bilateral or regional wars, such as the Iraqi invasion of Kuwait, the US invasion of Iraq and, lastly, the Second Lebanese War. The aforementioned crises and others had three characteristics in common: (a) All of them were relatively short; (b) None of these crises entailed internal political instability; (c) Above all, in the wake of these crises a significantly large financial package was given, either via inter-Arab support or externally mainly by the US.

Consequently, within a relatively short period of time, all tourism sectors mentioned above showed a fast recovery. In Jordan, for example, in 2001 the number of international tourist arrivals reached 1,427 million, stagnated at around 1,478 million in 2002 due to the events of September 11 and rose to 1,622 million in 2003. In Egypt the number of international tourists totaled 5,116 million in 2000 and then declined markedly to 4,357 million in 2001. However, a rapid recovery took place in 2002 with 4,906 million tourist arrivals in that year (WTO, 2003). Furthermore, after the attack in Luxor in November 1997, the Egyptian tourism industry quickly recovered, reaching 4,490 million tourist arrivals in 1999 compared to 3,213 in the previous year (World Bank Data, International Tourism, Number of Arrivals).

The current tourism crisis resulting from the Arab Spring is substantially different from all types of previous tourism crises mentioned above. This is mainly due to the following three reasons: (a) *The duration of the crisis.* Not only has the aftermath of the Arab Spring been going on for more than four years, there is no sign of it ending in the foreseeable future. (b) *The image factor.* In the tourism crises prior to the Arab Spring, the secular regimes of the countries affected were perceived as the victims of the Islamic fundamentalist attacks. This generated a sort of empathy, which helped the recovery process. However, in the current on-going crises the new regimes are perceived as the core of the problem itself. (c) *The lack of available foreign aid to support and re-activate tourist flows*. Since the new regimes are perceived as the core of the problem, it is quite clear why the ruling GCC countries are reluctant to donate significant financial aid to the countries affected with the exception of Jordan and recently also Egypt.

The Arab non-oil governments' reaction to the Arab Spring tourism crises

The non-oil Arab regimes have adopted four crisis management strategies in pursuit of damage reduction to the tourism sectors:

Improving the image and the perceived level of risk. Thus, both the new regimes of Egypt and Tunisia are constantly emphasizing that their countries are safe to visit. For them, creating a sense of security is crucial, particularly because their major tourism product is Triple-S. Thus, for example, on September 19, 2013, Egyptian security forces stormed the tourist town of Kerdasa (about 4.5 kilometers from Giza's Great Pyramids) that had turned into an Islamist stronghold. Also in Tunisia and Jordan the authorities have installed substantial security measures in order to restore a sense of security for tourists. One of the noted advantages that helped in regaining a feeling of safety and security is that these countries are known for their relatively low rates of street crime. This fact has been constantly used as part of their safety image campaign.

To create a clear division between the political events and the tourism industry. The idea was to convey to potential tourists a message that the political changes had nothing to do with the tourism industry which would continue to operate as it had prior to the Arab Spring. Thus, for example, in November 2011 the Egyptian Tourism Authority adopted the slogan: "*We are friendly. We are open-minded. We are proud of our country. We are Egypt. See you soon in Egypt*" (Rosenberg, 2011). The Tunisian authorities acted similarly and in early 2012 launched a new tourism promotion campaign under the slogan of "*Rediscover Tunisia*" (Ghanmi, 2012).

Disguise the Islamist characteristics in order not to deter potential secular non-Muslim tourists from coming. This strategy was predominantly used by Tunisia. Although there were some who called for "*halal* (permitted) tourism" in which men and women do not mix and no consumption of alcohol in public would be allowed but, to date, the Tunisian regime has not imposed any restrictions on tourists.

Price reduction. Another strategy widely used during and immediately after a crisis adversely affecting tourism is price reduction. This strategy was implemented, for example, when Egypt tried to convince tour operators worldwide to resume selling Egypt's Triple-S, mainly in Sinai and the Red Sea beach resorts (Smith, 2013; Khazan, 2012). The marketing campaign based on price cuts was intensified following the coups d'état of July 2013 (Ragab, 2013). In Tunisia, also, hundreds of hotels have slashed their prices, seeking to win back the Europeans who plumped for Spain, the Balkans and Turkey for their holiday (Field, 2012).

In summation, despite the tremendous efforts made by the non-oil Arab countries to keep the tourism sector out of the political turmoil, since early 2011 this sector has lost a considerable part of its business – a direct outcome of the political instability and turmoil known as the Arab Spring.

The great winners: Tourism expansion in the GCC Countries since the onset of the Arab Spring

In the GCC countries, as opposed to the situation in the non-oil Arab countries, the tourism industry since the onset of the "Arab Spring" has been flourishing. The most prominent increase occurred in Dubai in which the number of hotel guest nights increased sharply from 20,5 million in 2007 to 41,6 million in 2013 (see Table 4). This extraordinary increase occurred despite both the global economic recession and the Arab Spring. In 2013, the tourist arrivals in Dubai's amounted to more than 11 million (see Table 5), while hotel revenues increased accordingly, reaching $5,96 billion, an increase of 16.1% compared to 2012 (Nagraj, 2014).

Table 4
Number of hotel guests and hotel guest nights in Dubai, 2002-2013

Year	Hotel and hotel apartments - Guests	Hotel and hotel apartments - Guest nights
2002	4,756,280	10,945,987
2003	4,980,228	12,435,550
2004	5,420,724	15,200,087
2005	6,160,003	16,304,487
2006	6,441,670	17,590,026
2007	6,951,798	20,535,475
2008	7,531,299	22,421,067
2009	7,583,079	22,846,778
2010	8,294,132	26,626,679
2011	9,095,570	32,848,190
2012	9,957,162	37,445,453
2013	11,012,487	41,578,768

Sources: Government of Dubai, Department of Tourism and Commerce Marketing (DTCM); Government of Dubai, Dubai Statistics Center.

In 2013, the hotel occupancy rate in Dubai reached 80%, despite the fact that in 2012 accommodation capacity had been expanded by 12 new hotels with more than 4,000 rooms (MEED, April 25-May

1, 2014). The rapid expansion of Dubai's tourism activity continued in 2014 as well. According to data recently published by DTCM, the number of hotel guests amounted to 11,6 million, while the number of hotel guest nights reached 44,66 million (Sambidge, 2015). Also in all other emirates of the UAE there was a marked expansion of the tourism industry in both 2013 and 2014 (MEED, May 30-June 5, 2014).

Table 5
Number of hotel guests in Dubai by nationality, 2002-2013

Nationality / Year	UAE (nationals)	Other GCC	Other Arabs	Asia	Australasia and the Pacific	Africa	Europe	Americas	Total
2002	388,832	1,057,847	500,856	1,042,146	67,801	283,407	1,203,194	212,197	4,756,280
2003	396,101	1,025,383	523,673	1,177,725	78,444	276,683	1,294,885	207,334	4,980,228
2004	327,035	1,049,006	491,698	1,221,837	103,850	278,401	1,713,802	235,095	5,420,724
2005	327,131	1,211,407	564,634	1,276,901	147,615	332,632	1,940,255	359,428	6,160,003
2006	321,077	1,040,939	597,695	1,414,406	187,546	395,372	2,044,572	440,063	6,441,670
2007	385,821	984,604	589,664	1,563,897	211,428	426,485	2,246,273	543,626	6,951,798
2008	436,578	831,400	592,216	1,800,460	243,081	462,913	2,497,683	666,968	7,531,299
2009	770,614	905,647	614,755	1,814,098	189,092	447,126	2,247,240	594,507	7,583,079
2010	862,250	1,102,353	633,524	2,041,416	206,176	465,661	2,342,698	640,055	8,294,132
2011	966,829	1,583,955	685,819	2,163,633	222,638	520,716	2,329,078	622,902	9,095,570
2012	980,421	1,962,093	743,322	2,165,824	232,845	464,846	2,624,211	683,599	9,957,161
2013	1,022,799	2,249,348	900,769	3,241,968			2,873,709	723,894	11,012,487

Sources: Government of Dubai, Department of Tourism and Commerce Marketing (DTCM); Government of Dubai, Dubai Statistics Center.

In the case of Bahrain, despite the massive opposition protests by the Shi'a during 2011, the tourism industry suffered only from a temporary decline. By 2013, as seen in Table 6, the number of hotel guest nights amounted to almost two million – higher than ever before.

Table 6
Number of hotel guests and hotel guest nights in Bahrain, 2010-2013

Year	Hotel - Guests	Hotel - Guest nights
2010	995,061	1,898,823
2011	831,757	1,503,652
2012	1,028,551	1,858,979
2013	1,069,086	1,990,256

Source: Kingdom of Bahrain, Central Informatics Organization (2011-2013).

In Oman as well, as shown in Table 7, the number of hotel guests in 2012 was higher by almost 10% compared to 2011 and by 12.6% compared to 2010. In 2013, Oman's tourism sector grew by 10%, while the number of tourists reached 2,1 million (Times of Oman, February 16, 2014). Overall, a total of 24 new hotels were opened throughout Oman in 2013, bringing the number of hotels to 282 with 14,400 rooms (Muscutdaily.com, August 13, 2014).

Table 7
Number of hotel guests in Oman by main nationalities, 2010-2012

Nationality/ Year	Oman (nationals)	Other GCC	Asia	America	Europe	Total
2010	593,150	172,406	263,461	71,416	385,378	1,631,254
2011	664,577	163,007	308,060	56,763	350,790	1,678,359
2012	822,235	169,947	343,376	47,154	298,462	1,838,565

Source: Sultanate of Oman, National Centre for Statistics and Information (2013).

The Qatari tourism industry also expanded rapidly despite the events of the Arab Spring. By 2012, Qatar's tourism industry expanded by as much as 12% (Scott, 2013). In 2013, the number of tourists in Qatar reached 1,3 million compared to 1,2 million in 2012 (The Gulf Times, 2014a).Tourism data recently released reveal that the total number of tourists in Qatar increased by as much as 26% in the first quarter of 2014 as compared to the same period in 2013 (Gulf Times, 2014b).

What is the "secret" of the success of the GCC tourism industry?

This rapid expansion of the GCC tourism raises a question regarding the factors behind this success – and how is this success related to the Arab Spring? These issues will be discussed below:

A rapidly expanding of the domestic tourism market. While the domestic tourism markets in the non-oil Arab countries are poor due to the low income of the vast majority of the local population, in the GCC countries, the purchasing power of the nationals is very high. Moreover, since the traditional vacation sites in the non-oil Arab countries, mainly Beirut, Cairo and Amman, have become less attractive since the onset of the Arab Spring, an increasing number of GCC nationals prefer to take their vacations in one of the GCC tourism sites. In the case of Dubai, in recent years, the largest increase in hotel guest nights was generated by GCC nationals. This trend of massive increase in the domestic tourism can be found in Qatar as well. In 2012, the number of non-Qatari GCC tourists in Qatar increased by 13% compared to their number in 2011 (Scott, 2013). According to data released by QTA (Qatar Tourism Authority), in 2013 the number of tourists from the other GCC countries increased by 5% (The Gulf Times, 2014b). In Oman, also, there was an marked increase in the percentage of GCC nationals in hotel guest night figures (see Table 7).

Indeed, this policy of promoting domestic tourism has proved to be a great success. In January 2012, Dubai was leading globally in terms of hotel occupancy rates with 86% on average (MEED, April 20-26, 2012). In late December 2011 and early January 2012, during the Christmas holiday season, in the Burj al-Arab hotel (with an average room rate per night of $1,983), the occupancy rate reached 81% - much above the global average at this season (The Middle East, April 2012). Overall, in 2012, Dubai's hotel occupancy rate was 78% compared with 70% in both 2009 and 2010 (Dubai, DTCM, 2013b). Also in Qatar the hotel occupancy rate surged from 68% during the first quarter of 2013 to 75% in the corresponding period of 2014 (The Gulf Times, 2014b).

Rapid growth of GCC nationals. The demographic trend of the GCC nationals is unique. This is because they maintain high fertility rates despite the extremely low death rates. Overall, by 2010, the GCC national populations numbered 23,6 million compared to 11,4 million in 1994 with growth rates amounting to more than 2.5% on an annual average (Winckler, 2012). Thus, the combination of a higher number of nationals and a much higher per capita income produces a significantly larger market for domestic tourism in the GCC countries.

Political stability. One of the most familiar impressions regarding the GCC countries is their political stability. The regimes of these countries have remained stable since their establishment. With the exception of the Shi'a opposition in Bahrain and that of al-Qa'ida in Saudi Arabia, the other four GCC countries have not seen real political opposition. However, the regimes of Saudi Arabia and Bahrain are also strong and there is no real threat to these two monarchies either.

An extremely low crime rate. The GCC countries have an extremely low crime rate - one of the lowest worldwide – particularly against tourists. Thus, the widespread phenomenon in the major international tourism sites of crime against tourists such as robbery or pickpocketing or even cheating by taxi drivers or in restaurants is extremely rare in the GCC countries. The global economic recession has naturally led to an increase of street crimes, particularly against tourists. The extremely low crime rates thus constitute an indisputable advantage of the GCC tourism.

The geographical location. The GCC countries have the advantage of geographical proximity to Europe as well as being situated more or less halfway between Europe and the Far East. Their location permits them to host a substantial number of inbound tourists on the basis of short stop-over breaks for long-haul travelers. Thus, the GCC countries, without exception, have decided to transform their airports into unique tourism destinations in themselves. Dubai International Airport (DIA) has become one of the busiest in the world. In 2012, passenger traffic in DIA amounted to 57,7 million and reached 70,5 million in 2014 (DIA homepage). The Duty Free Centre in Dubai has grown to become one of the largest worldwide. In mid-2013, the tourism and aviation industries contributed 28% of Dubai's total GDP (MEED, "Dubai Aviation 2013"). Doha International Airport (DIA), like that of Dubai, has become in recent years one of the most sophisticated worldwide with its "Premium Terminal" offering travelers an opportunity to relax and unwind in comfort and to avail themselves of facilities stretching from spa treatments, a business center and for the young ones, a nursery (DIA homepage). In April 2014, Doha's new Hamad International Airport (HIA), was opened with two of the longest runways worldwide, aiming to accommodate 50 million passengers per year (HIA homepage; MEED, July 4-10, 2014). In light of these developments, it is no wonder that so many companies are flying so frequently to the Gulf.

The strategic decision of the GCC authorities to develop the tourism industry into a leading sector. Since the mid-1990s, but more so in recent years, the GCC authorities, without exception, decided to become a worldwide leading tourism destination (Mansfeld & Winckler, 2007). Even Saudi Arabia, which had originally rejected the idea of hosting international tourism other than the Hajj pilgrims, changed its traditional policy and gradually started to promote "Hajj extra" for Muslims which would combine the religious duty of the Hajj with visiting other Saudi sites. Within the framework of religious tourism, the Saudis built a large number of first class hotels in the two holy cities of Mecca and Medina. In October 2013, the Saudi Council of Ministers approved the new tourism law aimed at improving tourism facilities in order to convert the tourism industry into a more significant contributor to the Saudi economy (*Saudi Gazette*, 2013). During the past few years, the smaller emirates of the UAE also started to invest in tourism development. Ras al-Khaimah, for example, has invested in hotel building, aiming to complete 10,000 hotel rooms by 2016. In Fujairah as well, several hotels are currently under construction (MEED, November 30-December 6, 2012).

The image of the GCC as a totally safe destination for private investments. Due to the real negative interest rates in all the developed economies, private investors are constantly looking for profitable channels. The image of the GCC countries as a safe destination serves as a crucial factor to attract an immense number of private investments, including in the tourism arena.

GCC tourism policy

The above successful factors have been integrated into the GCC tourism policy that depends on three fundamental elements:

A rapid expansion of tourism facilities and diversification of the tourist products. Thus, in recent years in each of the GCC countries one can find massive investments in tourism infrastructures, hotels and sophisticated tourist attractions. In the case of Dubai, for example, under "Dubai Airports Strategic Plan 2020," the Emirate plans to invest $7,8 billion to boost DIA's capacity from 60 million passengers at present to 90 million by 2018 (Kan, 2012; MEED, "Dubai Aviation 2013"). However, Dubai International Airport is not big enough to handle the rapid increase in the number of passengers through Dubai, and despite the new Terminal Three, in 2018, the airport will reach its maximum capacity. For this reason, the 160 million-capacity supersize airport at Jabel Ali, Al-Maktoum International Airport, is currently under construction within the overall framework of Dubai World Center (DWC). This new mega-sized airport will supply a long-term solution to Dubai's future aviation needs. The airport was officially opened for passenger flights in late October 2013 (DWC, 2015). Dubai's tourism vision is to boost the number of tourists to 20 million in 2020 and to triple the tourism contribution to the GDP to more than $81 billion (MEED, May 31-June 6, 2013). A prominent tool used as part of the overall tourism diversification process is the cruise industry which has developed rapidly in the Gulf region in recent years. In 2013, in Dubai alone did the number of cruise passengers amount to 400,000 compared to 6,000 in 2001. Also Oman and Abu Dhabi are currently developing their own cruise terminals (MEED, April 25-May 1, 2014).

Also the other GCC countries are investing massively in the development of tourism facilities while offering an attractive terms for private investors in the tourism industry. In February 24, 2014, Issa bin Mohammed Al Mohannadi, Chairman of QTA, officially unveiled the "Qatar National Tourism Sector Strategy 2030." The aim of the plan is that by 2030 the tourism sector will contribute 5.1% to Qatar's GDP (up from 2.6% in 2013) while the number of tourists will reach the 7 million mark. To achieve this ambitious aim, the Qatari authorities and the private sector will allocate between $40 and $45 billion (QTA website; MEED, April 25-May 1, 2014). Within Oman's overall long-term economic policy - "Oman 2020" - the tourism sector is planning to contribute 9.2% of the total Sultanate's GDP up from 6.7% in 2010 (Gutcher, 2013). Also Bahrain is investing heavily in order to transform tourism into a leading sector, particularly as a generator of suitable employment opportunities for its rapidly increasing national workforce (Euromonitor International, 2013).

Creating extremely distinctive tourism attractions. This, for example, was the official policy being implemented for Dubai's tourism philosophy (Stephenson & Ali-Knight, 2010). Thus, everything in Dubai follows this form: The best hotel in the world (i.e., Burj al-Arab); the tallest hotel in the world (the Rotana Rose Tower, located in the tallest building in the world, Burj Khalifa) and so on. Qatar started from the beginning to present itself as a first-class international tourism destination, cut off from the "harsh outside world." In other words, "Qatar is heaven on earth, but for rich people only." The Omani tourism policy is also focused on bringing in quality tourists rather than quantity.

Transforming the Gulf into a global center for the most prestigious and hallmark international sport events and a leading center for international conferences and trade fairs. In December 2010, Qatar made international headlines when it won the right to host the FIFA Football World Cup in 2022. The major aim of the Qataris is to use the World Cup games to show the world what Qatar has to offer to tourists and through tourism to diversify its economy (MEED, January 13-19, 2012).

A major sports events tool for transforming the Gulf into a first-class global sports center was, and still is, the sponsoring of international and famous football clubs. In 2005, the Emirates airline signed a record $162 million deal with the English football club, Arsenal. As part of the deal, the name of the home ground was changed to "Emirates Stadium." In December 2010, the state-owned Qatar Foundation for Education, Science and Community Development signed a $40 million per year deal with Barcelona football club. In March 2012, the Qatar Investment Authority took full ownership of Paris Saint-Germain football club (MEED, April 27-May 3, 2012).

Another major tool for transforming the Gulf countries into sophisticated and unique tourism sites is to host major international prestigious events. The Qatar Motor show held in Doha on an annual basis is a good example of this policy. In this exhibition, one cannot find regular cars – only the most expensive ones.

The combination of a rapid increase of the domestic tourism industry, the distancing itself from the unrest of the Arab Spring, the rapid spread of an image projecting a prestigious tourism destination, the low crime rate, and the unique weather, all these together ensure the continuation of a rapid development of the GCC tourism sectors.

Discussion and summary

Using a macroeconomic approach, this paper reviewed and analyzed the tourism-economic ramifications of the Arab Spring and the global economic recession that started in the late 2000s as they affected two groups of Arab countries: The non-oil and the GCC states. The analysis showed that while the non-oil Arab countries, which experienced socio-political and economic problems and had to cope with tourism crises, the GCC countries have managed to boost their tourism performances very rapidly. The postulate that the non-oil Arab countries could have benefited from this culturally and politically sympathetic market and use it as a strategic crisis-management tool, as happened in previous tourism crises, had to be rejected. Due to travel warnings and other factors, tourists of the GCC countries preferred to travel domestically within the Gulf area. That was the reason for the sharp increase in the number of hotel guest nights of GCC nationals in recent years. Furthermore, the non-oil Arab countries lost non-Arab international visits to the GCC countries. This was an economic loss that needs to be evaluated not only in terms of the number of arrivals, but as a financial loss of high-end affluent tourists.

The paper also revealed some interesting insights reflecting on issues of tourism crises and recovery, on the image of destinations facing socio-political unrest and on the influence of a multiple crisis situation environment (the Arab Spring and the global economic recession), as well as the ability to confront a tourism slowdown that may deteriorate into a full-scale crisis. While current literature has contributed a variety of explanations for the characteristics and dynamics of tourism crises (e.g.; Mansfeld & Pizam, 2006; Avraham & Ketter, 2008; Beirman, 2009) it has not yet looked at the economic resilience of a specific country as an explanatory factor of crises in the world of tourism.

In this respect, the trigger for these tourism crises is very similar to that in other countries which have gone through comparable socio-political turmoil. The cases of the recent economic crisis in Greece, the recent demonstrations in Istanbul, Madrid and in Thailand and the four coups d'état in Fiji in the last two decades are just a few examples. As Saha and Yap (2014) have recently concluded, socio-political events may have not only a devastating impact on tourism, but their severity and contribution to tourism crises is much more serious than security-related ones. The findings of this paper support their conclusion and suggest that the focus of future research should shift from security-induced tourism crises to finding mitigation strategies dealing more specifically with the impact of socio-political unrest on tourism crises.

Another interesting finding is that the image of Arab countries as (un)safe destinations due to the Arab Spring affected the two country groups differentially. Thus, the negative image developed in the wake of the Arab Spring has not spilled over into the GCC countries. On the contrary, the Arab Spring not only emphasized the already-known fact that there is no longer an "Arab region" or "Arab world" but, rather, there are separate Arab countries while the GCC has become a kind of "miniature Arab League." Hence, the GCC countries not only remained untouched by the deteriorating image of countries involved in the Arab Spring, but even gained tourists flows redirected to them both by Arab and international tourists. Thus, one could say that the "pain" of the tourism industry of the non-oil Arab countries was, to a large extent, the "gain" of the GCC tourism industry.

This finding somewhat contradicts the observations of previous studies, claiming that there is always some spillover of negative images from affected countries to others that have nothing to do with a given conflict. The literature attributed this "spillover effect" (Hoti, McAleer & Shareel, 2007) to geographically over-generalized media coverage on the one hand, and geographic illiteracy among some tourists, on the other. Thus, place-specific tourism crises are geographically framed using terms such as "The Middle East" or "The Arab Spring." As such, they can easily mislead potential tourists and project local conflicts on to much larger tourism spaces. Oddly enough, such a spillover effect may have taken place within the non-oil Arab countries but did not adversely affect the GCC states.

It is important to note that this paper used a macroeconomic approach and thus the method of data collection was based on secondary statistical data, reports on the tourism crises in daily newspapers and on "gray" sources, such as internal reports of public organizations. Using this blend of data allowed only descriptive statistical analysis to be used. The broad picture obtained from these data facilitated a comparative analysis of the two groups within the Arab countries. However, further research characterizing the specific influence of the Arab Spring on the "tourism DNA" of each of the countries will require primary data generated by interviews with tourism stakeholders in each country and more detailed secondary data on each country's tourism performance.

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Submitted: 11/11/2014
Accepted: 14/05/2015