

COMPETITIVENESS OF LEBANON IN TOURISM: COMPARISON WITH JORDAN, EGYPT AND TURKEY

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ABSTRACT: *The purpose of this research is to determine Lebanese tourism industry's competitiveness compared to its major rivals, i.e. Jordan, Egypt and Turkey. First of all, Lebanese tourism industry was evaluated through obtained information from secondary sources (i.e. bank reports, Ministry of Tourism reports). Then, the Travel & Tourism Competitiveness Report (2015) is used to compare the global rankings of Egypt, Jordan, Turkey and Lebanon. And finally, questionnaire analysis was carried out to understand people's perception towards these countries. Findings revealed that the tourists' inflow to Lebanon has witnessed a constant decrease since the emergence of the Arab Spring while it demonstrated its second annual upturn in 2015. However, overall ranking in the globalised world showed that Lebanon is in the last position compared to its rivals. Findings also indicated that despite having worse results compared to its rivals in factors like business environment, human resources, labour market and ICT readiness, Lebanon confirmed a better standing in health and hygiene and performed better than Egypt in safety and security matters. It was also proven by this study that Lebanon is performing either similarly or better in factors like mild climate, image, leisure attractions, educational and multilingual workforce, regional competition and environment protection. However, conversely, it demonstrated either bad or worse performance in factors like eco-tourism, world class hotels and airports, natural environment, cost of accommodation and natural heritage. Moreover, the results of the research showed that the competitive position of Lebanese tourism is not the same in different international markets.*

KEYWORDS: Tourism Competitiveness, Lebanon, competitive advantage

INTRODUCTION

Along with the rise of space tourism, the margins of rivalry concerning tourism destination cannot be determined anymore. In fact, it is a progressively more routine that every year, new countries, areas and places surface as new tourism destinations, while a part of them introduce new spaces for tourism, others devote sources to create new experiences for their guests, or emerge as ultimately new destinations in the aftermath of crises, clashes or changed political systems.

These countries regard tourism as a remarkable chance for supporting their national economic growth. As the challenge for acquiring new tourists and tourism income intensifies, tourism as a product is constantly being given new forms to offer continuously increasing criteria which include different options, varying from watching wildlife from air balloons to lodging with local

families in Brazilian Favelas and African settlements. Moreover, new entertainment models such as getting part in scientific voyages like calculating coral reduction or wildlife classification in addition to underwater hotels have been introduced. In such manner, the count of tourism destinations is on the rise while alternatives concerning experiences are boundless.

It is undeniable that all tourism destinations are in a rivalry seen the financial movement that tourism creates. The important thing in this matter concerning branding and marketing a tourism destination is to determine the destinations that are the closest in rivalry with the offered destination. While doing so, it is critical to determine the most significant influencers taken into account by visitors when they evaluate different destinations including the offered one and then to find out the positive and negative aspects of the offered destination compared to its closest competitor.

Among the most quoted factors that visitors consider important concerning their perfect holiday destination are nature, culture, adventure and heritage. However, the majority of countries can provide these in varying forms. In order to find out the competitive status of the offered destination, it is required to examine more than what is standard and determine the aspects that actually motivates visitors compared to what their closest rivals have to offer. It should be founded on an exact grasp of various visitor segments and the factors that stimulate them for travelling. In this sense, it is critical for a country that offers a tourism destination to be aware of their competitive strengths, comprehend various customer segments and determine the position of its destination compared to its closest rivals. This works as a commencement point in determining what is necessary to differentiate the offered destination and developing a competitive character. With this in mind, in this study, the aim was set to determine Lebanese tourism industry's competitiveness compared to its major rivals, Jordan, Egypt and Turkey.

LITERATURE REVIEW

Concept of Competitive Advantage

The notion of competition is commonplace in contemporary developed societies. Nevertheless, the significance of the notion of competitiveness is influenced by the benchmark used for its assessment, irrespective of whether it is applied to a service, a city, a region or an entire nation. There are multiple methodological approaches that can be applied to its evaluation. The literature on competitiveness reflects a variation in the concepts, methodology and evaluation standards applied. According to Barbosa, de Oliveira & Rezende (2010), proposed concepts of competitiveness in the financial arena are abundant, which has created a diverse range of theory associated with the notion of competitiveness. Barbosa et al. (2010) also argue the variety of approaches to the notion of competitiveness renders it difficult to apply as an across-the-board concept while being useful. From the perspective of competition, the notion of competitiveness reflects the capacity for longevity, sustainability, and profit generation in new or competing markets.

Porter (1985) defines competitive advantage as the capacity for an organisation or industry sector to provide goods and services perceived as having increased value to consumers compared to competing goods and services. In a large number of studies, the concept of competitiveness is defined from the perspective of the superiority of one organisation relative to another within a particular industry sector, irrespective of domestic and international markets.

According to Buckley (1990), competitive advantage is used as an assessment of the capacity to increase net wealth relevant to previous strategies and further argues there is potential for competitive advantage to become a strategic issue if the optimal advantage can be achieved in an effective manner. Buckley (1990) subsequently highlights the significance of identifying strengths and weaknesses relative to those of the competition, the minimisation of potential threats and maximisation of opportunities. Porter (1980) also highlights the significance of the relationship between strategy and competitive advantage.

Porter (1980) notes an organisation can develop competitive advantage by utilising its resources in an optimal manner, to create superior performance and profit. Porter (1980) nevertheless argues that the current position of an organisation is characterised by two key aspects of significance. Porter (1980) states such aspects include the nature structure of the industry in which an organisation operates including the number of competitors in a market, their respective sizes and approaches to competition, rate of growth in the sector, where an organisation is positioned in the industry in terms of size, market share, competitive approach etc.

Porter (1980) was also behind the development of analysis at the industry level for the purpose of establishing the ways in which an organisation can best compete within a sector in order to create and maintain the strongest position for its market offering. Porter (1985) also developed generic market strategies based on the notions of cost leadership, differentiation and focus. Porter (1985) claims economies of scale drive attainment of comparative cost advantage. Buckley (1990) states superior market offerings and effective marketing can drive differentiation, while achievement of absolute cost advantages is attained through access to and application of superior technologies or cheaper distribution.

According to Oral (1986), the notion of competitiveness can be extended to include entire national economies. Oral (1986) points out the relationship between the economic power of one nation and its competitiveness compared to other nations. Shafaei (2009) defines economic power as the capacity for economic development, effective exports and the ability of a nation to ensure the wellbeing of its population. Shafaei (2009) argues national competitiveness is defined as the capacity of a nation to produce, distribute and service its market offering in a global market to create international competitive advantage related to other countries, as well as increasing the standard of living for its people. Shafaei (2009) further argues that increases in the living standard of a nation should be used as a measurement basis for national competitive advantage, rather than trade balance, positive current account or increases in foreign exchange reserves.

Porter (1990) developed an approach that bases the measurement of national competitiveness on the level of productivity of a nation. Dollar and Wolff (1993) further suggest defining national competitiveness as the ability of a nation to be successful in international trade using modern technology to increase productivity and consequently, increasing the wages and income of the nation.

The shared characteristics of the above definitions reflect the widespread agreement on the national competitiveness definition. Nevertheless, the concept has evolved and developed since

its inception. Gaining improved insight into the notion of national competitiveness requires the review of competition theories , which is discussed in the next section.

Measuring National Competitiveness

The literature review indicated the traditional approach of competitiveness theories in the international arena focused on analysis of macroeconomic performance at the national level. According to Durand and Giorno (1987), the analytical approach was characterised by its comparison of the significant economic markers of a nation against those of its trade partners, including inter alia, indicators such as the capacity for technological innovation, degree of products specialisation, quality of constituent products, after-sales service value and productivity, all of which contribute significantly to a country's trade performance. Durand and Giorno (1987) noted the qualitative character of such indicators, which necessitate the use of other quantitative indicators such as wholesale, export and consumer prices, gross domestic product (GDP), deflators, cost of labour units and exchange rates. Both types of economic indicator have associated advantages and disadvantages, which is why multiple methods have been developed for application to the measurement of international competitiveness. The following outlines key notions developed for the purpose of assessing a nation's competitive advantage .

Revealed Comparative Advantage Index

The Revealed Comparative Advantage (RCA) index was developed in 1965 by Balassa for the purpose of assessing the competitive advantage of a nation within specific sectors or products. Kilduff and Chi (2007) state the importance of a specific product or product group measured in terms of total exports to a nation comparative to the importance of the product or product group to its trading partners, is the basis upon which the RCA seeks to measure a nations' competitive advantage.

Kilduff and Chi (2007) argue the ease of application of the RCA render the benefits of comparative data possible (i.e. trade data), which indicate fluctuations in real competitive advantage. Furthermore, application of the RCA enables analysis of a nation's export volume in terms of total exports of a specific product, in addition to global export totals for the same product. "RCA evaluates export performance as the total exports of a specific product, divided by the total exports of that country compared to the world exports of the product, divided by total world exports" (Shafaei, 2009, p. 21). Shafaei (2009) notes under the RCA analysis, where the value of the index exceeds one, this is interpreted as having revealed competitive advantage for the exporting nation; however where the value of the index is less than one, it suggests that competitive disadvantage is in evidence for the specific product or sector in that country to which the RCA is applied. Where the RCA of a nation increases within a specific timeframe, this indicates a commensurate increase in the export volume of that nation. According to Shafaei (2009), such a result may also be interpreted as increasing international demand for that particular product. Nevertheless, the reverse also applies and where the RCA for a good decreases within a specific timeframe, this indicates a commensurate decline in exports volume for that nation. Shafaei (2009) also notes that, subsequently, this may be as well be interpreted as a decline in international demand for that particular product.

The problem of asymmetry is often subject to discussion under Balassa's RCA model. For a nation to have an RCA index from zero to infinity, the nation requires specialisation as nations that do not specialise will only have an index from zero to one. Kilduff and Chi (2007) highlight

the issue that the index does not address nations which do not export anything in a particular sector.

Nation Brands Index

Internationalisation or globalisation is based on the concept of competition for the purpose of attracting investors, stakeholder, consumers and other target markets from the global market, with the intention to become dominant in the global market. This is the background against which the concept of nation branding was introduced. Nation branding is the brand of a country which represents that nation's competitive advantage on an international scale. How a nation is perceived by others is a key dimension of a nation's brand (Barbosa et al., 2010).

From this perspective, nation branding involves the creation of positive emotional experiences amongst target audiences for the purpose of differentiating a nation in terms of industry sectors such as tourism, investment, exportation and others. Application of the Nation Brands Index is intended to assess the opinions of target audiences regarding different dimensions of a nation including its culture, assets, industry, politics, human aspects, business activity and its influence on tourists to establish a global ranking (Barbosa et al., 2010).

The Anholt Nation Brand Index developed in 2002 operates using a six-dimension framework based on national areas of competence: tourism, exports, governance, investment, immigration, culture, heritage and people. The figure below illustrates these dimensions.

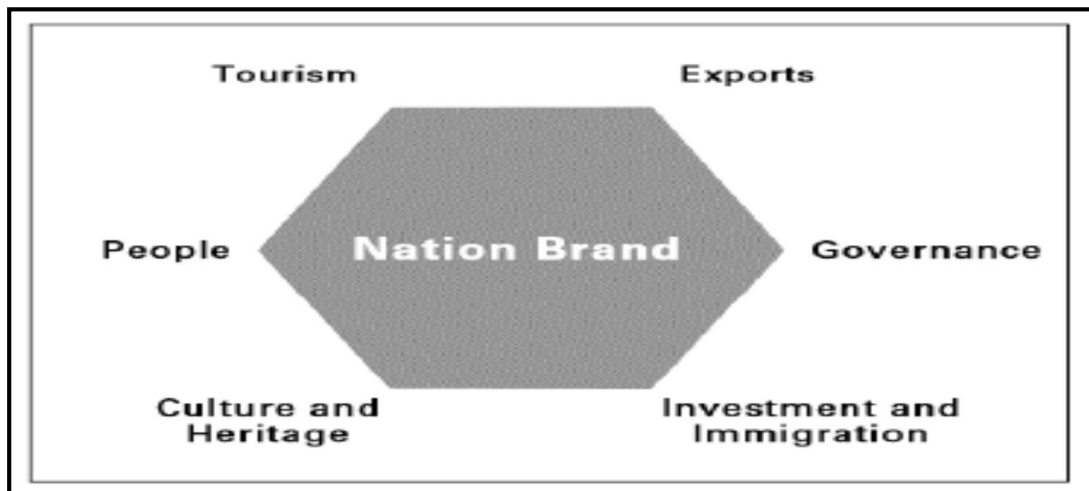


Figure 1: National Brand Hexagon
Source: Anholt (2002)

The national brand hexagon, showed in above figure, places tourism in the rank number “one” as the first and most important dimension for ranking a nation's brand. According to Gnoth (2002), the perception of an image of a country is influenced by tourism, which is why tourism is a key area for capital and marketing investment in the creation of a national brand.

The second ranked and second most important dimension in the national brand hexagon is exportation and it is often considered as one of the most significant aspects of building a national brand. Countries build a reputation in the international market through their exports, which is why exports are considered important national assets.

The significance of governance in the national brand hexagon and to the national brand is its representation of the politic arena and its close links to foreign and internal policy. Georgescu and Botescu (2004) considers that governance has an integral role increasing the visibility of a nation to other countries. The dimension of the national brand hexagon representing immigration and investment denotes the level of attractiveness of a country to foreigners from the perspective of investment in that country and the effectiveness of its social integration of foreigners. This dimension has significant consequences for international investment and sustainability and ultimately its contribution to national branding (Barbosa et al., 2010).

The distinct culture and heritage of a nation is how that country is recognised, respected and relied upon by others. The quality of life of the people of a nation is reflected in that nation's culture and culture has a significant influence on perceptions and opinions. This dimension in the national brand hexagon represents the average people of a nation and therefore represents the nation's human capital. National characteristics associated with the people of a nation such as friendliness and similar are indicative of the nature of personal interaction within that nation (Georgescu & Botescu, 2004).

Georgescu and Botescu (2004) argue the six dimensions of the national brand hexagon represent the six channels of communication a nation has with other nations. On this basis, comprehensive and extensive research is required to develop long-term international strategy. Georgescu and Botescu (2004) further argue that nations adopt long-term strategy for international communications through the six dimensions of the national brand hexagon. The Nation Brand Index was developed to measure the six dimensions with the intention of revealing the opinions and perceptions of the people of a particular nation. Consequently, the Nation Brand Index is recognised as an essential index for comparative national brand assessment on an international scale.

Porter's Diamond Model

Porter (1985) considered that national aspects are what drive certain sectors of a nation to seek, develop and enhance competitive advantage in the international market. Porter (1990) recognises the requirement for a paradigm within which to assess a nation's position and subsequently set about conducting a ten-nation study to examine a method that is capable of reflecting the reasons why a nation may be successful in one sector but not in others. The ten-nation study was implemented across developed nations, with subject nations as follows: Italy, Sweden, Denmark, Germany, United Kingdom, Japan, the United States and Switzerland. However, due to high level of industrialisation in South Korea and Singapore, these two nations were excluded from the study. According to Oz (2002), Porter used 100 case studies associated with the countries included in the study, in order to develop key aspects, collectively referred to as the diamond of competitive advantage.

According to Porter (2002), the diamond of competitive advantage comprises the aspects of demand conditions; factor conditions; organisational structure, strategy and rivalry and; related and supporting industries. Factor conditions involve how well equipped the workforce of a nation is and cost of labour units, effective materials and energy. Demand conditions address how to improve and increase demand by developing insight into its key drivers. Organisational structure, strategy and rivalry address the nature of competition with the industry and; related and supporting industries address to presence of supporting sectors within the industry.

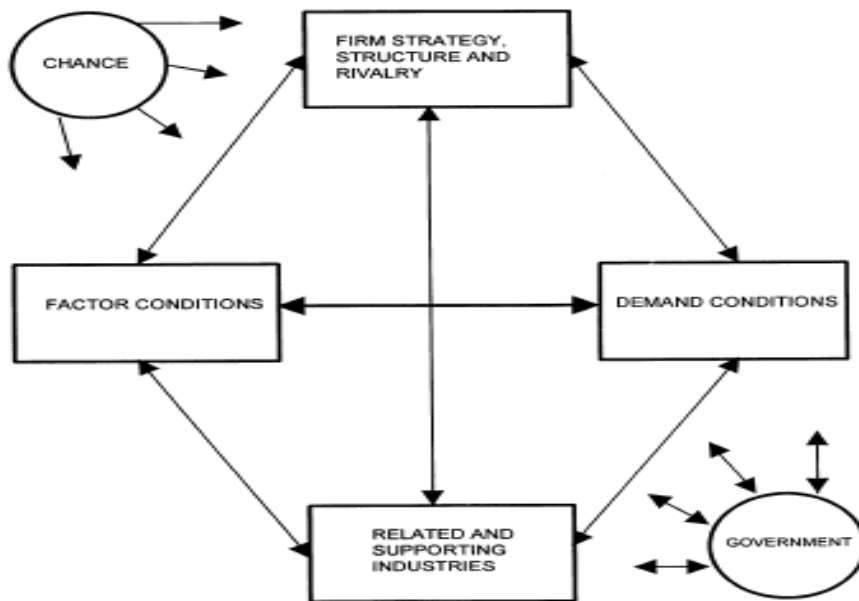


Figure 2: Diamond Framework

Source: Porter (1990)

Tourism and National Competitiveness in Tourism

World Travel Organisation (1991) defines tourism as the travelling actions of a person undertaken to a different setting than the usual environment for a certain period of time from the place he or she normally lives. Besides, it is argued that the fundamental drive for travelling is to pay a visit to a place instead of making money. According to this definition, where usual environment is cited, it is highlighted that for the activity to be considered as a touristic one, it should be done in an outer place than the ordinarily living environment. Likewise, routine and regular trips between the living place and the work place and alternative community trips that possess a repetitive nature are not considered as touristic visits while by underlining limited time period, it is intended to show that activities for earning money or long-term relocation cannot be considered as touristic activities (Porter, 2002). This definition has the purpose of excluding relocation for temporary work. Chadwick (1994) proposes a definition of the term “tourism”. He suggests that tourism is a temporary relocation of a person from a place to another place for purposes of business, pleasure and other personal interests.

The definitions given above highlight that tourism differs from alternative products due to the fact that it constitutes many various services (Page, Brint, Busby & Connell, 2001). In this sense, it possesses individual features. As an example, in order for the production and consumption of the tourism products to take place the active involvement of the visitor is necessary. Besides, large capital investments including airlines, hotel chains or car rental firms, and so on are also required for tourism (OECD, 2004). Furthermore, tourism also has linkages

with various aspects including altering demographic characters, ways of life and holiday and work patterns (Poon, 1993).

Tourism Forecasting Council (2000) categorises tourism activities into three which are domestic, inbound and outbound. While domestic tourism is the trip of residents in a certain country; inbound tourism is the movement of different country residents into a country and outbound tourism is the travel of a country residents to other countries. Tourism Forecasting Council (2000) also determined three varying tourism groupings along with these three tourism forms, which are internal, national and international tourism. Internal tourism covers domestic and inbound tourism, where national tourism covers domestic and outbound tourism and international tourism covers inbound and outbound tourism.

Factors Significant In Acquiring Competitive Advantage in Tourism

As stated previously, tourism can be considered as a different product due to the fact that it is intangible and calls for the active involvement of the visitor, not storable, needs high financial investments, and has linkages with various services. Moreover, it is vulnerable to the changes in demographical factors or ways of lives. Taking into account these features, the aspects considered imperative to acquire competitive advantage are found as below:

- Human Factor and Education:

Tourism is a service form and therefore calls for high engagement of people. In this sense, it creates a fundamental source of employment opportunities for people. It is considered as a critical factor for the economic, social and cultural progress in countries. Hence, it is crucial for destinations to obtain a competitive advantage by an effective and productive education (Jasimuddin, 2001).

- Sustainable Tourism and Environment:

Among the most remarkable aspects in tourism is the environment. Presence of ecosystems such as forests, rivers, coasts, cultural and historical heritage and art sites are attractive factors for visitors. Obtaining a sustainable competitive position can be accomplished through the development of sustainable tourism, which is referred to as “developing and preserving an area such as community or environment in a way that it does not affected by welfare of other activities and practices” (Haley & Haley, 1997). Put in another way, sustainable tourism calls for responsible behaviours through potent devotion to protecting the natural environment and supporting the local residents. Merely if the environment is preserved clean and healthy, tourism competitiveness can be obtained.

- Image:

Tuohino (2001) suggests that image is the understanding, ideas, insight, view and discernments of an individual regarding objects, people, happenings or places. Considering destinations, individuals possess varying images and based on these images, they choose between different options (Tuohino, 2001). Positive image creates a competitive advantage for destinations.

- Safety and Health:

It is also important for a destination to have a safe and secure image. Certain happenings including war, social conflict, terrorism, criminal activities, natural disasters, diseases and outbreaks, etc. have an effect on the people’s view of the destination (Eraqi, 2006). Having a negative image in this sense harms the competitiveness of a destination.

The above listed aspects are critical in accomplishing and preserving competitive advantage in tourism. These also demonstrate the risks which a destination can encounter with that can cause the destination to lose competitiveness relative to its rivals.

METHODOLOGY

In this study, positivist approach was followed. According to Collis and Hussey (2003), the approach of the positivist philosophy is based on the concept of research examining observable realities, producing results from which generalisations can be made that are aligned with the laws of the natural and physical sciences. Collis and Hussey (2003) defined a phenomenon as an event, occurrence or fact that is perceived and gives rise to a question. The research methodology underpinning science forms the basis for the research methodology adopted under a positivist approach, which systematically analyses the facts relating to and cause of such social phenomena. Along with the positive approach, deductive reasoning was used and the data were collected based on the literature reviewed – Nation Brand Index and the factors significance in acquiring competitive advantage in tourism.

In reality, research is a scheme which has comprehensive viewpoints, and focuses on determining the discussion and creating the findings. Collis and Hussey (2003) suggest that research method verifies the aptitude to embrace concepts. For the purpose of distinguishing the authentication of the techniques and secondary units, a number of research methods can be employed. In this study, exploratory type of research was preferred. It is because, competitiveness of the nations can change over the time and the studies which are based on them should be aiming at taking pictures of the current situations.

It is possible to differentiate the research by means of review of present data, or through conducting surveys, examination, or experimentation. In order to realise the data collection purpose, questionnaires were used under the survey technique in the current study. Two types of data, secondary and primary, were used. The secondary data were collected to form the literature about the issue being studied as well as to interpret the findings about the Lebanese tourism industry, while primary data was on the other hand collected through questionnaires which are carried out with French people.

Hence, first of all, Lebanese tourism industry was evaluated through obtained information from secondary sources (i.e. World Tourism organisation reports, bank reports, ministry of tourism reports). Then, The Travel & Tourism Competitiveness Report (2015) is used to compare the global rankings of Egypt, Jordan, Turkey and Lebanon. And finally, questionnaire analysis was carried out to understand the people's perception towards these countries.

The questionnaire was elaborated based on the nation's brand index and the factors significant in acquiring competitive advantage in tourism. In this research, the six top nationalities visiting Lebanon were chosen for examination. According to the Yearbook of Tourism Statistics dataset issued by the World Tourism Organization (2016), the six top countries from which non-resident tourists are coming to Lebanon are Iraq, United States of America, France, Canada, Jordan and Egypt (table 1).

Table 1: The six top nationalities visiting Lebanon

	2011	2012	2013	2014	2015	M. Share	Change (2014-2015)
Iraq	129,294	126,982	141,986	189,156	191,578	12.62	1.28
USA	110,165	110,539	103,483	114,015	135,606	8.93	18.94
France	128,999	120,134	117,688	120,710	134,181	8.84	11.16
Canada	79,978	75,751	71,841	78,419	91,324	6.02	16.46
Jordan	129,640	89,100	78,018	73,822	77,960	5.14	5.61
Egypt	62,825	64,017	63,578	69,179	75,524	4.98	9.17

Source: World Tourism Organization (2016)

In the sampling process, online sampling calculation tool was used (<http://www.surveysystem.com/sscalc.htm>). In each calculation, confidence level was taken as 99% and confidence interval was taken as 10%. Accordingly, the number of 166 was determined as a sample size for each of the six country mentioned previously.

Table 2: Sample Size

	USA	Iraq	Jordan	Egypt	Canada	France
Population	318.9 million	33.4 million	6.45 million	82.0 million	35.1 million	66.0 million
Conf. Level	99%	99%	99%	99%	99%	99%
Conf. Interval	10%	10%	10%	10%	10%	10%
Sample	166	166	166	166	166	166

The questionnaire was distributed to the total of 996 people through emails. In selecting participants, the researcher made sure of their familiarity with the examined countries, Turkey, Jordan, Egypt and Lebanon. Facebook and LinkedIn were used for the questionnaire distribution and all the questionnaires were retrieved from the participants.

However, it was identified that 15 questionnaires from the US, 10 questionnaires from Egypt, 8 questionnaires from France, 7 questionnaires from Jordan, 22 questionnaires from Iraq and 30 questionnaires from Canada were not filled properly. In order to make a relevant comparison between the findings, the researcher had to withdraw 30 questionnaires from each country's results before the analysis. Therefore, 136 completed questionnaires from each country were considered.

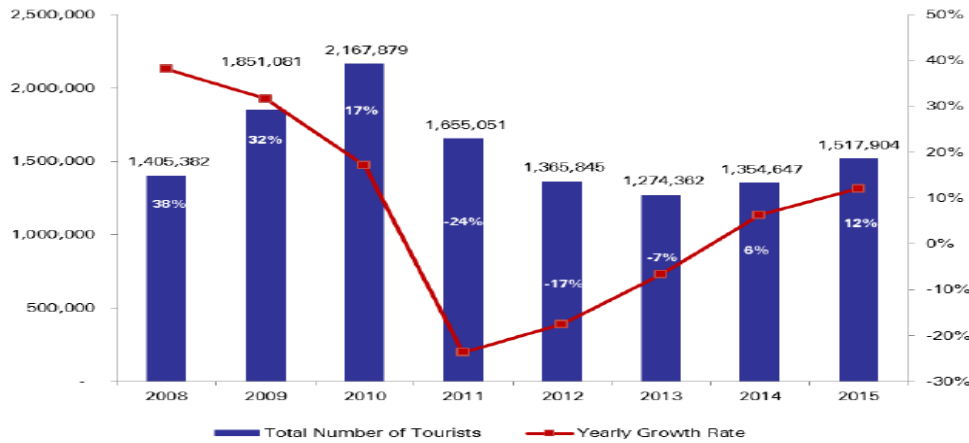
ANALYSIS

In the analysis, at first the Lebanese tourism industry was evaluated, then, the Travel & Tourism Competitiveness Report (2015) was used to compare the global rankings of Egypt, Jordan, Turkey and Lebanon. And finally, the questionnaire analysis was carried out to understand people's perception towards these countries.

Lebanese Tourism Industry

The inflow of tourists to Lebanon has shown a constant decrease since the emergence of the Arab Spring while it demonstrated its second annual upturn in 2015. After a three-year period of tourism decline because of the instability and extensions from the Syrian war, which happens in a neighbouring country, the Ministry of Tourism launched data indicating a 12 per cent increase in the tourist inflow to reach 1,517,904 tourists in 2015 on a yearly basis (Blominvest, 2015).

Table 3: Growth Rate of Lebanon Visitors



Source: Blominvest Bank (2015)

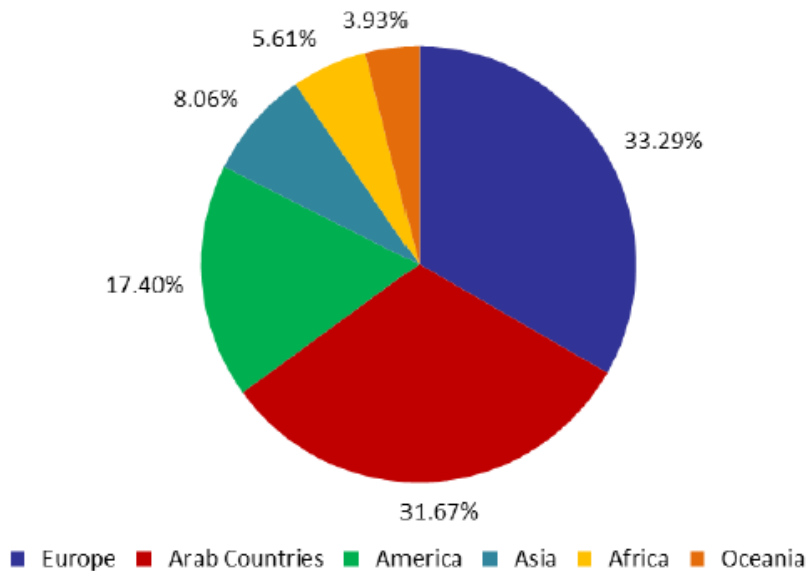


Figure 3: Visitors of Lebanon
 Source: Blominvest Bank (2015)

After several years, it was the first time that European tourists compared to Arab tourists dominated the largest portion of the overall tourist count arriving in Lebanon. This increase in the increase of the European tourists compared to Arab tourists can be explained by the effects of the decline in Arab Gulf tourist numbers and the introduction of bed and breakfast models which attracts different preferences (Blominvest, 2015). The count of the European tourists, which corresponds to the 33.29 per cent of the overall tourist number, increased by 12.87 per

cent on a yearly basis and reached 505,264 (Blominvest, 2015). To provide more details, it has been the French tourists that corresponded to the largest portion among the European tourists with a percentage of 27 per cent, augmented by an 11.16 per cent annual rise to reach 134,181 people. Besides, tourist numbers from Germany, the UK and Turkey have also demonstrated a comparative rise on a yearly basis to increase by 10.05 per cent, 15.11 per cent and 30.39 per cent respectively to meet 74,823, 56,608 and 21,027 in 2015 in that order (Blominvest, 2015).

The volume of Arab tourists, which constitutes the second largest portion of the overall tourist number, also showed an increase in 2015 but this increase was much lower than the European visitors'. Up to the year 2011, the largest bulk of tourists visiting Lebanon were constituted by the oil-rich Gulf countries; however, this is no longer the case. The Arab tourist count increased by 4.32 on a year on year basis to meet 480,723 people and 31.67 per cent of the total in December 2015. Out of the Arab tourists, Iraqi visitors constituted the largest portion by 40 per cent, and this number rose by a yearly 1.28 per cent to 191,578 by December 2015 (Blominvest Bank, 2015). Besides, it is necessary to highlight that an important part of the Iraqi tourists coming to Lebanon are in fact refugees that are moving to this country because of the increasing security issues in Iraq. The count of Egyptian tourists increased by 9.17 per cent from 69,179 to 75,524, whereas Jordanian tourists' number rose from 73,822 to 77,960 by a rate of 5.61 per cent. Likewise, the incoming Saudi tourists' number increased by 4.46 on a year on year basis to 47,831 by December 2015 (World Tourism Organisation, 2016).

Global Ranking Comparison – Jordan, Egypt, Turkey, Lebanon

The Travel & Tourism Competitiveness Report (2015) was used in this part to demonstrate the Lebanese tourism industry's position compared to Turkey, Egypt and Jordan.

Table 4: Overall Ranking

Country	Score	Ranking
Turkey	4.08	44
Jordan	3.59	77
Egypt	3.49	83
Lebanon	3.35	94

Source: The Travel & Tourism Competitiveness Report (2015)

Table 4 demonstrates the Lebanese tourism industry's overall ranking in the globalised world and its main competitors' positions. According to this, Lebanon is in the last position compared to its rivals. Turkey is at the first position within this group of countries and demonstrates a better competitiveness compared to others.

Table 5: Ranking of the Countries Related to Tourism Factors

Country	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
Turkey	4.54	4.23	5.41	4.30	4.17
Jordan	4.86	5.79	5.53	4.56	4.17

Egypt	4.11	3.40	5.40	4.12	3.80
Lebanon	3.76	3.81	6.04	3.99	3.62

Table 5 demonstrates the Lebanese tourism industry's position related to tourism factors. Despite having worst results compared to its rivals in factors like business environment, human resources and labour market and ICT readiness; Lebanon showed a best result in health and hygiene factor and performs better than Egypt in safety and security issue.

Questionnaire Analysis

As mentioned before, In order to obtain visitors' perceptions towards the countries being investigated in this study, questionnaire was also conducted. The questionnaire was based on the Nation Brand Index and the factors significant in acquiring competitive advantage.

The questionnaire consists of two parts. In the first part, demographic characteristics of the respondents were determined and in the second part, developed scale based on the Nation Brand Index and the factors significant in acquiring competitive advantage was used. 5 point Likert scale - Good to bad - was used in this study (1= very bad, 2= bad, 3= moderate, 4= good, 5=very good). The demographic characteristics of the respondents are presented in the table 6.

Table 6: Demographic Characteristics of the Respondents

		Frequency			Frequency	
Gender	Male	466	Approximate gross combined household income	Low income	201	
	Female	350		Mid-income	367	
Age	18-25	142		High income	248	
	26-35	228		Employment status	Full-time	598
	36-45	299			Part-time	133
	46-55	125			Highest Level of Completed Education	Unemployed
	56-65	10				
	66+	12				
Primary school	12					
Secondary school	47					
High school	152					
University	538					
Master / PhD	67					

Table 7: Perception of the All Participants towards Nations (Total Average Score)

Factors	Lebanon	Jordan	Egypt	Turkey
Varied landscape	3.55	3.04	3.98	4.63
Natural heritage	2.95	3.20	4.20	4.65
Mild climate	4.67	2.91	3.60	4.14
Adequate ground transport	1.63	1.56	2.21	1.96
Infrastructure	1.10	0.95	0.72	1.54

Cultural and religious heritage	2.98	2.3	4.28	4.73
Image	2.05	1.50	1.97	2.23
Leisure attractions	4.73	3.43	3.17	4.80
Cost of accommodation and tourists services	2.73	3.87	1.99	4.01
Educated and multilingual workforce	4.05	3.00	2.40	3.22
Natural environment	3.76	3.35	4.21	4.70
World-class hotels and airport	3.59	2.35	4.31	4.20
Political conditions	2.96	3.98	2.24	2.35
Regional competition	4.56	3.87	4.65	4.35
Environmental protection	4.16	2.21	4.58	3.27
Security and safety concerns	2.97	3.95	2.21	2.73
Eco tourism	3.01	2.85	3.16	4.50

Based on the “mean” analysis, it can be said that Lebanon is performing either similarly or better in factors like mild climate, image, leisure attractions, educational and multilingual workforce, regional competition and environment protection. However, conversely, showing either bad or worst performance in factors like having eco-tourism, having world class hotels and airports, having natural environment, cost of accommodation and having natural heritage. Despite these findings, it can be said that Lebanon’s performance is moderate and it can be claimed that its competitiveness is also moderate compared to Jordan, Turkey and Egypt. However, in comparison to countries one-by-one, it can be said that Lebanon is performing better or near to Jordan and Egypt however, performing worse than Turkey.

Table 8: Perception of the Participants towards Nations

Factors	Iraq				Canada				France				Jordan				USA				Egypt			
	Le	Jor	Eg	Tur	Le	Jor	Eg	Tur	Le	Jor	Eg	Tur	Le	Jor	Eg	Tur	Le	Jor	Eg	Tur	Le	Jor	Eg	Tur
Landscape	3.65	3.00	4.00	4.75	3.30	3.35	4.00	4.85	3.65	3.10	4.10	4.45	3.35	2.70	3.70	4.45	3.95	3.30	4.30	4.75	3.40	2.80	3.80	4.55
Heritage	3.00	3.25	4.25	4.65	2.70	3.00	4.00	4.70	3.20	3.45	4.45	4.85	2.70	2.95	3.95	4.35	3.30	3.55	4.55	4.95	2.80	3.05	4.05	4.45
Climate	4.85	3.05	3.76	4.25	4.70	2.85	3.74	4.20	4.75	2.95	3.66	4.15	4.55	2.75	3.46	3.95	4.55	3.05	3.46	4.25	4.65	2.85	3.56	4.05
Transport	1.70	1.62	2.25	2.00	1.72	1.70	2.50	2.20	1.80	1.72	2.35	2.10	1.40	1.32	1.95	1.70	1.70	1.62	2.20	2.00	1.50	1.42	2.05	1.80
Infrastructure	1.20	1.05	0.84	1.65	1.25	1.10	0.86	1.70	1.00	0.95	0.64	1.45	0.90	0.75	0.54	1.35	1.25	1.05	0.84	1.65	1.00	0.85	0.64	1.45
Cultural Heritage	3.00	2.32	4.32	4.84	2.90	2.22	4.12	4.64	3.50	2.82	4.82	4.94	2.70	2.02	4.02	4.54	3.02	2.30	4.30	4.82	2.80	2.12	4.12	4.64
Image	2.00	1.45	1.92	2.02	2.10	1.55	2.02	2.12	2.50	1.95	2.42	3.52	1.70	1.15	1.62	1.72	2.00	1.45	1.92	2.02	2.00	1.45	1.92	2.02
Leisure	4.82	3.50	3.26	4.90	4.72	3.40	3.16	4.80	4.92	3.60	3.36	4.95	4.52	3.30	2.96	4.60	4.82	3.50	3.26	4.90	4.62	3.30	3.06	4.70
Cost of accommodation	2.74	3.89	2.00	4.02	2.94	4.09	2.20	4.22	2.94	4.19	2.20	4.22	2.44	3.59	1.70	3.72	2.78	3.81	2.05	4.10	2.54	3.69	1.80	3.82
Educated workforce	4.00	3.04	2.45	3.24	4.30	3.34	2.75	3.54	4.50	3.00	2.40	3.34	3.70	2.74	2.15	2.94	4.00	3.04	2.45	3.24	3.80	2.84	2.25	3.04
Environment	3.90	3.50	4.36	4.85	3.70	3.30	4.16	4.65	3.80	3.30	4.16	4.65	3.60	3.20	4.06	4.55	3.90	3.50	4.37	4.85	3.70	3.30	4.16	4.65
World-class hotels	3.69	2.45	4.40	4.30	3.68	2.40	4.35	4.20	3.65	2.43	4.42	4.35	3.39	2.15	4.10	4.00	3.69	2.45	4.40	4.30	3.49	2.25	4.20	4.10
Political Conditions	3.02	4.00	2.30	2.40	3.00	4.00	2.20	2.30	3.00	4.02	2.35	2.55	2.72	3.70	2.00	2.10	3.02	4.20	2.30	2.40	3.02	4.00	2.30	2.40
Regional Competition	4.70	4.00	4.80	4.50	4.50	3.80	4.60	4.30	4.55	3.75	4.60	4.30	4.40	3.70	4.50	4.20	4.75	4.00	4.80	4.50	4.50	4.00	4.60	4.300
Environmental Protection	4.23	2.32	4.65	3.35	4.20	2.30	4.63	3.30	4.20	2.30	4.63	3.32	3.93	2.02	4.35	3.05	4.20	2.02	4.65	3.35	4.20	2.30	4.60	3.30
Security	3.05	4.00	2.33	2.80	3.00	4.00	2.30	2.80	3.00	4.05	2.30	2.75	2.75	3.70	2.03	2.50	3.05	4.00	2.03	2.80	3.00	3.95	2.30	2.75

Eco Tourism	3.00	2.89	3.20	4.55	3.30	3.00	3.50	4.85	3.00	2.85	3.10	4.35	2.70	2.59	2.90	4.25	3.00	2.80	3.20	4.55	3.10	2.99	3.10	4.45
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Based on the findings (table 8), Lebanon has a good tourism competitive position in the outbound tourism markets of Iraq, France and the United States of America; however, this position is weak in the outbound tourism markets of Canada, Jordan and Egypt.

DISCUSSION AND CONCLUSION

The rise in the tourism significance for the nation's economy is reflected in the increased competition between tourist destinations around the world. Countries, cities and regions chosen by tourists as their destination means an influx of income from tourism, job creation and tax revenues.

Consequently, the fundamental basis for strategic planning for tourist destinations focuses on measurement of the strength of the advantages and disadvantages of the factors that are influential on tourism activity. Put another way, this means the fundamental strategy revolves around assessment of the competitive advantage of tourist destinations and the subsequent allocation of resources and prioritisation of activities to enhance the competitive edge of a destination. With this in mind, the purpose of this research was to determine Lebanese tourism industry's competitiveness compared to its major rivals, Jordan, Egypt and Turkey.

In doing so, first of all, Lebanese tourism industry was evaluated through information obtained from secondary sources (i.e. World Tourism Organisation reports, bank reports, Ministry of Tourism reports). Then, The Travel & Tourism Competitiveness Report (2015) is used to compare the global rankings of Egypt, Jordan, Turkey and Lebanon. And finally, the questionnaire analysis was carried out to understand the people's perception towards these countries. 996 questionnaires were distributed; however, 30 questionnaires from each of the six countries were not included in the analysis.

Findings indicated that tourists' inflow to Lebanon has revealed a constant fall since the emergence of the Arab Spring while it demonstrated its second annual upturn in 2015. After a three-year period of tourism decline because of the instability and extensions from the Syrian war, which happens in a neighbouring country, the Ministry of Tourism launched data indicating a 12 per cent increase in the tourist inflow to reach 1,517,904 tourists in 2015 on a yearly basis. However, overall ranking in the globalised world demonstrated that Lebanon is in the last position compared to its rivals. Turkey is in the top position among this group of countries and demonstrates a better competitiveness compared to others, i.e. to Jordan, Egypt and Lebanon. Findings also exposed that despite having worst results compared to its rivals in factors like business environment, human resources and labour market and ICT readiness; Lebanon has shown a better result in health and hygiene factor and performed better than Egypt in safety and security matters. A better result in health and hygiene factor is good because the hygiene factor is considered as one of the important factors which affect tourism (Iraqi, 2006). This also creates positive image among the people and in return ultimately increases the competitiveness (Tuohino, 2001).

It was also found in this study that Lebanon is performing either similarly or better in the factors like mild climate, image, leisure attractions, educational and multilingual workforce, regional competition and environment protection. However, conversely, showing either bad or worst performance in factors like having eco-tourism, having world class hotels and airports, having natural environment, cost of accommodation and having natural heritage.

Based on this it can be said that Lebanon can establish its competitiveness by promoting the hygiene factor in its tourism products compared to others', its mild climate and leisure attractiveness, its multilingual workforce and its care towards the environment. In fact, mild climate and leisure attractiveness (Haley & Haley 1997), sustainable tourism (Haley & Haley 1997) and multilingual workforce (Jasimuddin, 2001) are considered really important for the competitiveness. However, the accommodation cost should be revised and its hotels standards ought to be improved.

Moreover, the results of this research revealed a weak competitive position of Lebanon in the outbound tourism markets of Canada, Jordan and Egypt. Therefore, Lebanese ministry of Tourism should cooperate with the private operating sectors in tourism in order to improve the perception of all international potential tourists and specifically Canadians, Jordanians and Egyptians. This can be reached through well-planned advertising and public relation campaigns.

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