

MARKETING LIBYA AS A TOURIST DESTINATION: STRATEGIES FOR DEVELOPMENT

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ABSTRACT: Although Libya is not a tourism-dependent country, this activity could become one of the most important sectors for the Libyan economy and its importance for the country's development is increasing year by year. The national economy, which for so many years has been bolstered by the oil factor, could clearly benefit from this growth in tourism.

Tourism as a recognized industry in the world is relatively recent, and in Libya is a young country. Libya has the potential to become one of the most attractive places for tourists in North Africa. However, in order for Libya to fully exploit this tourism potential, there are several important issues to consider.

The paper will be concerned with important issues regarding the development of the sector. It analyses the opportunities and challenges with which Libya's international tourism is confronted as well as suggests the choices of policies and strategies Libya should undertake for its tourism development in the shadow of the country's new orientations to reduce its economic dependency on oil revenue.

Keywords : Tourism, Libya, challenges, opportunities, planning, development.

INTRODUCTION

Tourism is one of the largest industries in the world and, in several countries tourism has replaced oil at the top of the list in terms of foreign currency movements.

In fact international tourism is an important part of trade in services, whose development has attracted the attention of the world community. Many countries in the world have taken international tourism as a major option to balance their international payments.

Libya has played host to many great former civilizations throughout history. This makes it literally a museum for great relics left by such civilizations. The tourist in Libya has the unique opportunity to enjoy a series of well-preserved archaeological ruins remaining despite the thousands of years that elapsed since. The tourist can still experience the great achievements of former civilizations, such as the Pheonician colonies established in the first half of the last millennium BC, the Garamantain Empire, the Roman Empire, the Greeks, the Vandals, the Berber and the Moslems.

In addition, Libya has a strategic location, it is a connection point between the East , the West and the South of Africa. Moreover, Libya is a huge territory with a small population of only five million. About 1700 km of coast expends a long Mediterranean Sea.

However, there is still a lot of work that needs to be done before Libya can compete with other countries as a popular tourist destination. For many years, there has been a lack of investment in the country's infrastructure. Service facilities and personnel are inadequate to meet the demands of the increasing influx of tourists. In addition, marketing and promotional strategy have become essential to improve the image, awareness and knowledge about the country as a tourist destination that Libya really lacks.

OPPORTUNITIES AND CHALLENGES

During the last few years, Libya has witnessed a huge growth in the tourism industry, and has experienced a large influx of overseas visitors. Looking to the future, Libya's international tourism development will encourage both opportunities and challenges. The opportunities

that Libya's international tourism may encounter are various, and include at least the following:

Great potential of an international market

For all destination countries, the international tourism markets are beyond their own boundaries. Therefore, the actual and potential tourism demand relies not only on the social and economic development of the tourist generating countries and on the entire world political and economic situation, but also on the political and economic relationship between the tourist generating and receiving countries.

Survey conducted during September and October 2003 indicated that international tourists visit Libya for different purposes (see Table 1).

| Purpose of visit | Number |
|---------------------------------|---------------|
| Vacation/holiday | 184 |
| Visiting historical places | 147 |
| Desert | 89 |
| Culture | 50 |
| Business | 39 |
| Adventure | 17 |
| Interesting and friendly people | 15 |
| Good weather | 12 |
| Appealing local food (Cuisine) | 10 |
| Value for money | 5 |
| Sunny Beaches | 3 |

Number of total valid responses = 282
 Responses exceed 100% due to multiple responses
 Source: Field research

As can be noted from Table 1, the top three purposes were: vacation/holiday 65%, visiting historical places 52% and the desert 32%. They were ranked as number one, two and three respectively. At the other end of the table: sunny beaches 1% and value for money 2% were considered the least important purposes for visiting Libya.

As a result, it can be observed that a large number of tourists are attracted by the country's historical attractions and admired the desert attractions. On the other hand, it can be noted that there is a lack of tourism facilities and promotional campaigns in tourist areas, such as beaches, which was ranked the least important among the other purposes of visiting the country, while in other tourist countries this is considered as a significant tourist attraction for tourists as well as valuable source for foreign exchange. Therefore, the opportunity exists to utilize these resources when more investment is injected to improve the service facilities to meet the requirements of the international tourist markets.

Beside these markets, the markets of scuba-diving, spa tourism, marine-based activities (e.g. game fishing, flotilla sailing), conferences, exhibitions and fairs tourism and others, leave much more room for development.

Economic diversification and infrastructure improvements

Many developing countries now regard tourism as an important and integral part of their economic development. The benefits of tourism are usually felt at two levels: macro or national, and micro or sub-national level. At the first level, tourism is expected to foster economic growth through foreign exchange earnings and an increase in the state revenue. At the second level, are an improvement in people's well-being in the areas of job creation, revenue or income distribution and balanced regional development (Dieke, 2003). Government of developing countries, including Libya, have introduced tourism as an attractive developmental option to sustain the national economy, which for many years has been bolstered by the oil industry.

The primary aim of the Libyan economic development plan in the 1980's was based on the diversification of the economy away from oil. This was due to two reasons, firstly, the reduction of world oil prices over the previous decade; secondly, the lack of formal economic plans to overcome this problem (WTO, 1998).

Therefore, this recognises ongoing economic diversification opportunities represented by the development of the tourism sector and its integration within wider economic planning could play a vital role in sustaining the national economy beside the oil factor. Moreover, tourism development could achieve community well-being for inhabitants all over the country, because each area specializes in particular tourist products and uniqueness of culture, which could make a great attraction to different market segments. Also, tourism can be a tool to motivate governments to inject more money in improving infrastructure, especially in the initial stage of tourism development. Many developing countries cannot afford to finance construction internally. Thus, the need for cooperation between public, private and foreign investment becomes essential.

In many developing countries where infrastructure represents a major problem, many tourism market segments cannot be targeted unless the requisition for these kind of market segments can be offered. As a result, the revenue generated from a specific market segment could be invested in tourism related services to target more market segments gradually. This requires the active involvement of the construction industry and other related sectors. Investment in fixed assets provided by construction work cannot be removed from the country. For example, as cited by Eccles (1995), tourism in southern Italy has been used as a development tool to improve public infrastructure rather than manufacturing (Barucci and Becheri, 1990).

According to Font and Ahjem (1999), developing a new tourism related product or service, requires intensified efforts at the initial stages in order to gain a proportion of the market share and then to maintain this position in the medium to long run. Regarding the Libyan case, investment legislation should be carefully considered to make investment in tourism as easy as possible in order to stimulate various companies to invest in tourism infrastructure. Typically, new destinations are needed to meet tourists' requirements and monitor changes in consumer motivations and satisfaction with the product in order to keep it up-to- date. For instance, Libya was one of the countries, who were bidding to host the 2010 Football World Cup. If Libya is to succeed in competing more effectively a huge budget has to be devoted to improving infrastructure and establishing a number of new hotels and other tourism related services to meet these specific market requirements. The Commonwealth Games, which were hosted by Manchester in 2002, generated considerable construction activity both in terms of new construction work and refurbishment of facilities, and are a good other example.

From that, it is obvious that tourism might be used as a tool for improving the infrastructure of a destination, which requires the involvement of various parties under government guidance. A country like Libya, which entered the international tourist market, only recently, should invest heavily in improving infrastructure and other tourism

facilities in order to prepare to meet the international tourist market requirements. Tourism investment legislation should be treated as a special case in order to be more attractive to both local and foreign companies.

Libya’s international tourism development may also meet the following serious challenges in the future:

Lack of market image, awareness and knowledge

Typically before customers make a decision to purchase a tourist product, a great deal of information is needed. Hence promotion becomes particularly important. It might be said that there are two major ways in which a national tourist organisation should promote its product. The first is undifferentiated marketing by means of which the overseas promotion strategy is aimed at building a general image for the tourist destination. Communications mix, i.e. advertising, public relations, personal selling and sales promotion can be used for that purpose. The second is differentiated marketing, where promotional activities are directed at different target segments based on the product types. In this method it is likely to supply a product or service, which can meet the consumers’ needs as well as emphasise a promotional difference between other competitor countries.

A survey was conducted with UK tour-operating companies who never sell Libya as a tourist destination. Respondents were asked to identify the major reasons for their companies to eliminate Libya as a holiday destination among other tourist destinations. Table 2 shows that the major reasons for eliminating Libya as a tourist destination by the respondents’ companies were awareness and knowledge.

Table 2 Reasons for eliminating Libya

| Reasons | Frequency |
|-------------------------|------------------|
| Awareness and knowledge | 7 |
| Safety | 5 |
| Travel difficulties | 3 |
| Experience | 2 |
| Weak potential | 2 |
| Visa entrance | 1 |

Total valid response = 10
 Responses exceed 100% due to multiple responses
 Source: Field research

From the above Table, findings indicate that Libya is a relatively less known tourist destination among other tourist destinations in the UK travel market, and there is a complete absence of promotional activities. Therefore, the country’s projection in the travel trade and in the mass media is vital to increase the tourist demand for Libya. It is necessary to create public awareness and to generate tour operating companies’ interest by additional investment for marketing the destination in the UK.

Some of the respondents under investigation expressed their concern about safety. Regarding this issue, an important point can be raised. Reversing the situation of respondents, who sell Libya as a tourist destination, respondents who do not sell Libya as a holiday destination seem to consider Libya an unsafe place for tourists. Officially this is due to the fact that respondents who do not sell Libya as a holiday destination did not have the chance to visit the country and experience its tourist attractions, attitude of local people,

safety etc. This negative image held about the country among those people is caused by the European media, which for a long time kept describing Libya as a terrorist country.

On the other hand, according to the tourist survey which was conducted as part of the field research, the findings demonstrated that the attitude of local people and personal security came on the top of the list among other services elements regarding tourist satisfaction (see Table 3). The findings may emphasize that once tourists arrive in the country and perceive the level of security this could change their impression about this particular aspect.

As a result, the Libyan tourist bodies should consider this issue carefully by improving the image of the country to develop an effective presence in the UK to create public awareness and improve image as well as improving tourism distribution links for the tourism development. Moreover, travel difficulties, weak potential and visa entrance were other critical issues raised by respondents. Again, the inadequate awareness and knowledge that respondents have about the country led to the lack of interest among these tour-operating companies to promote Libya to their clients. In fact, if the Libyan tourist bodies do not provide these companies with relative information needed about various aspects such as tourist product(s), tourist facilities, traveling options and so on, no rewards will be accomplished. Supporting the above statement, there is evidence from some of these companies that Libya is not featured in their approaches among other tourist destinations due to the lack of knowledge about the country.

The paramount challenge hindering the development of international tourism in Libya is the negative image of the country as a tourist destination that held among the European tourist markets resulting from western media attitudes in the 1980's and early 1990's (WTO, 1998). Nowadays, tourism competition is not only competition among tourist companies, but far more importantly, the competition of national power among destination countries particularly after the realization of its significance to the national economy. As a result, another challenge for Libyan tourist product(s) is to be sustainable and high quality in order to create and promote a tourism product that is differentiated from its competitors.

Unique attractions but services and facilities shortages

Libya has an extensive and varied range of tourism resources that are spread widely throughout the country. These include attractive natural features and many different landscapes of the vast Libyan desert, human achievements in the form of buildings, town, art history as well as modern man-made attractions etc. These unique attractions need provision of additional facilities to improve the presentation and interpretation at the major sites as well as facilities to improve visitor comfort.

Local services play an important role in attracting tourists to visit a tourist destination. When tourists are satisfied with the efficiency and level of services provided they will be motivated to stay longer in the country as their major aim is to seek relaxation. In addition, tourist flows throughout a tourist destination and tourism diversification depends heavily on the competency and the level of services provided.

In order to assess the extent to which tourists were satisfied with local services in Libya, ten different services and facilities were introduced in a questionnaire survey directed at international tourists visiting Libya. The survey's random sample, were requested to rate these services and facilities using a five-point scale ranging from "very dissatisfied" to "very satisfied". Moreover a separate label "do not know" was added to the scale for those who may not have had the opportunity to experience such services and facilities. Values 1 to 5 and 0 were used respectively for each of these variables.

Table 3 Tourist's satisfaction with local services in Libya.

| Elements of perception | Very dis-satisfied | Dissatis-fied | As expected | Satisfied | Very satisfied | Do not know | Total | Mean value |
|--|--------------------|---------------|-------------|-----------|----------------|-------------|-------|------------|
| 1. Attitude of local people | 6 | 7 | 34 | 77 | 101 | 47 | 272 | 4.2 |
| 2. Personal security | 8 | 6 | 40 | 63 | 104 | 51 | 272 | 4.1 |
| 3. Quality of travelling roads | 10 | 24 | 63 | 86 | 66 | 23 | 272 | 3.7 |
| 4. Desert facilities | 9 | 9 | 20 | 30 | 26 | 178 | 272 | 3.6 |
| 5. Restaurants | 31 | 31 | 68 | 62 | 41 | 39 | 272 | 3.2 |
| 6. Facilities offered at tourist centres | 18 | 23 | 28 | 30 | 26 | 147 | 272 | 3.2 |
| 7. Airport/Border services (Custom) | 44 | 31 | 47 | 45 | 36 | 69 | 272 | 3.0 |
| 8. Airport/Border services (Immigration) | 53 | 37 | 39 | 50 | 34 | 59 | 272 | 2.9 |
| 9. Communication services | 56 | 34 | 40 | 32 | 12 | 98 | 272 | 2.5 |
| 10. Hygiene and sanitation | 83 | 66 | 56 | 30 | 9 | 28 | 272 | 2.2 |

Number of total valid responses = 272

Source: Field research

Table 3 shows the answers of the respondents, which are ranked in order according to the mean value. The higher the mean value, the better the service was considered by the respondents.

CHOICE OF POLICIES AND STRATEGIES

Tourism development of a country may be directly related to the potential of international market demand. However, the experience of various countries in their tourism development is that governments policies regarding tourism play a significant role in tourism development. It has been observed that the government-led pattern in tourism development has been adopted in many developing countries in the world. Therefore, it is essential for Libya's General Board of Tourism (GBT) to regulate its policies and strategies for the development of international tourism parallel with the general goal of national and economic development.

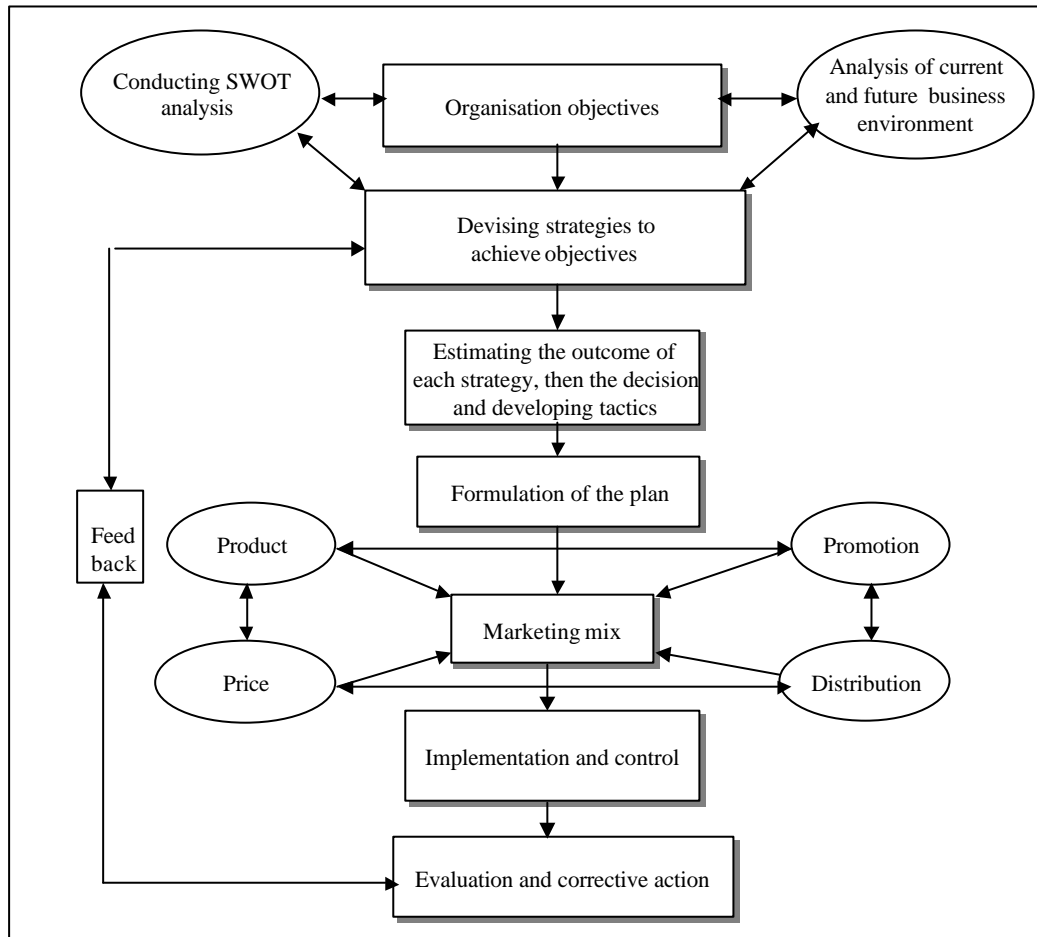
Marketing Plan

The aim of planning for tourism is to identify major issues that are likely to affect the development and management of tourism as well as to develop policies and programmes to assist in making the industry more viable and sustainable.

Planning for tourism can be an important consideration for developing countries, especially where international tourism is expanding rapidly. If international tourism is allowed to expand without regulation and without any kind of plan, then very soon many attractions will be threatened, as has been experienced in some developing countries (Mathieson and Wall, 1982).

Planning is an essential process to identify goals, resources, and existing opportunities for the organisation. In addition, planning is needed to meet short and long-term objectives. A marketing plan should not be isolated. It must be integrated and co-ordinated with the

financial plans, organisational plans, purchasing plans and other aspects of the organisation's total activity. As illustrated, in Fig.1, marketing is simply a tool by which an organisation achieves its objectives. By the use of marketing activity, an organization could be able to identify new product and marketing opportunities, evaluating them and taking action to develop them.



Source: By authors

Figure 1 Tourism marketing planning stages model

The planning framework reviewed in this paper, may assist the development of tourism in a country like Libya, which has a central planning approach. Moreover, it may play a role in assisting the concerned- planners and policy-makers to develop suitable projects. This could lead to a prosperous economy as well as achieving social, cultural and environmental benefits to sustain the country's resources.

In Libya, for a tourism plan to be more effective, the following elements should be considered as an initial stage: first, establishing required tourist facilities and human resources to meet the standard level of the international markets; second the creation of an awareness and knowledge of the country's tourism resources that the country possesses as well as generating a positive image for the country as a tourist destination.

The second stage is to respond quickly to the international market's changing conditions by allowing adequate flexibility and convenient modifications to the plan as well as conducting regular market research in order to understand actual and prospective tourists'

needs and wants. This may result in offering the country's tourist product in a more attractive way than its competitors.

Strategies for the development of Libya's tourist product(s)

The marketing and promotional strategies of Libya as a tourist destination should address the key issues arising from those major internal and external influences that may have an impact on the existing and future level of tourism

In a country like Libya, where the tourism sector is relatively undeveloped, the need for an official body to be responsible for the development and marketing of tourism is essential. It can be the wholly government and/or part of the civil service, in the form of a Board of Tourism as the case of Libya, or it can be a section of some other ministry. It can be a semi-government or statutory body and outside the civil service as in the case of a broad commission or authority (Mill and Morrison, 1992).

The National Tourist Organisation (NTO) is responsible for tourism matters at the national level, and with their offices abroad at the international level. It is important to note that they are not producers. They generally do not sell products directly to the visitors and they are not directly responsible for quality of services delivered, although most aim to influence it (Middleton, 2001). However, they play a very significant role in the promotion of the country as, being the official body to plan the national tourist policy, they coordinate the activities within the tourism sector, control the different aspects of tourism services and implement tourism information and promotion programmes.

It is generally recognised that tourism promotion is a very costly activity. Many developing countries including Libya have a small proportion of the international tourist market and such proportion cannot only be sustained by the huge promotion expenditures to take a larger share of the market. For these countries, in order to promote their tourist product more effectively, potential and actual tourists may find it more attractive if a multi-destination package results from their high expenditure and long travel time. As a result, tour operators can satisfy their customers and maximise their profits by organising packages for multi-destination holidays. Libya with other African countries might be a good example for a multi-destination package. This promotional strategy may help the country to build up a positive image and awareness among the international tourist markets gradually.

Each city or town in Libya specializes in a particular tourist product or culture, which makes it different from one another. Therefore, the need for planning becomes essential in order to find out the strengths and weaknesses of these areas as a tourist destination, the kind of tourist markets that should be targeted, and services and facilities needed to meet the requirements of such tourist markets.

International visitors expenditure and foreign exchange

The major objective of developing international tourism in all countries is to increase foreign exchange. According to the tourist survey conducted by the authors, international tourists were invited to indicate their length of stay in Libya. A breakdown of the answers received is showed in Fig.2.

From the chart it can be observed that a two weeks stay was the favorite for tourists, since the highest proportion of them (53%) spent this period of time in Libya. Moreover, less than one week period came second where 30 per cent of participants indicated that they stayed this period of time.

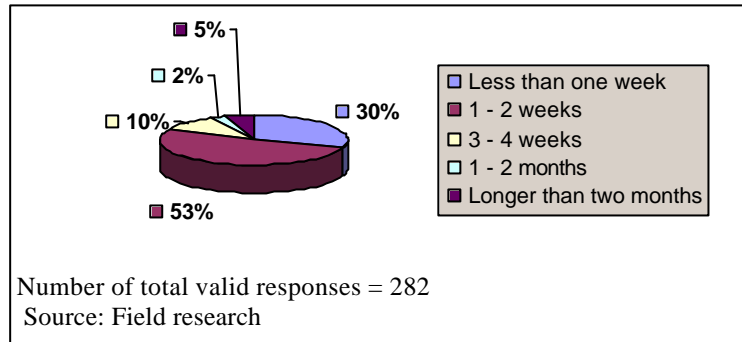


Figure 2 Tourists' length of stay in Libya

Therefore, it is necessary to develop special-interest attractions, which may help visitors to stay longer. In addition, to the fact that Libya is currently known among some international tourist markets as a cultural destination, Libya has the opportunity to become one of the best sun, sea and sand destinations in the world beside other tourist attractions, which could lead to diversification of Libya's tourist product and increase the tourist length of stay, which would result in boosting tourist returns.

Moreover, costs for tourists, particularly shopping and air flight tickets, which showed negative result in the international tourists survey should be carefully considered to try to offer value for money and be competitive with other countries as tourist destinations in the region. As a result, this may encourage tourists to visit Libya and spent more time in the country as well as attracting new tourist market segments. (See Table 4).

Table 4 Tourist's satisfaction with price level in Libya

| Elements of perception | Very poor value | Poor-value | Satisfactory | Good value | Very good value | Do not know | Total | Mean Value |
|--------------------------------|-----------------|------------|--------------|------------|-----------------|-------------|-------|------------|
| 1. Food and drinks | 8 | 12 | 42 | 64 | 45 | 84 | 255 | 3.7 |
| 2. Package tour to destination | 5 | 10 | 29 | 38 | 27 | 146 | 255 | 3.7 |
| 3. Local transportation | 12 | 16 | 35 | 42 | 37 | 113 | 255 | 3.5 |
| 4. Accommodation | 7 | 11 | 30 | 16 | 21 | 170 | 255 | 3.4 |
| 5. General price of trip | 19 | 15 | 41 | 46 | 23 | 111 | 255 | 3.3 |
| 6. Air flight to Libya | 12 | 18 | 36 | 27 | 20 | 142 | 255 | 3.2 |
| 7. Shopping | 24 | 17 | 32 | 30 | 27 | 125 | 255 | 3.1 |

Number of total valid response = 255

In Table 4 a five-point scale ranging from "very poor value" to "very good value" was used. In addition, a separate column of "do not know" was attached to the scale so as to assess more accurately the opinions of the respondents. Values 1 to 5 and 0 were used respectively for each of these variables. It is important to note that the higher the mean value, the lower the price of the tourist services and facilities was considered by tourists. It can be observed that respondents appeared to be satisfied with the prices of food and drinks, package tours to destination and local transportation, while they were less satisfied with the prices of accommodation and the general price of trips. In contrast with the price level of the services and facilities shown in the Table, respondents were completely dissatisfied with the price of air flight to Libya and shopping prices.

CONCLUSION AND CURRENT RESEARCH

The development of international tourism depends strongly on the destination's efforts as well as the support of the outside environment. Hence, tourism is very sensitive business. Any internal or external environment changes at or outside a destination will definitely have an impact on the number of tourist arrivals. Also, shortcomings from tourism operators at a destination may make potential visitors choose other destinations instead.

Tourism development is seen as a way of improving a country's economy and social well-being. Tourism development in a country like Libya can be a great motive to inject more money in improving infrastructure and tourism facilities, especially at the initial stage of tourism development. The government of Libya realised the economic importance of tourism, but due to some problems, some of which have been indicated in this paper, very little progress was made to develop tourism.

For all organisations a marketing plan is essential to achieve objectives, by the use of a selected choice of strategies. The marketing plan will be designed to select the most appropriate strategy among several alternative strategies to achieve one or more of its objectives. These objectives should be compatible with the characteristics of the market or markets and with the capacity of the tourist facilities, within a normal cultural and social framework. In addition, marketing plans should not be isolated. Modifications and flexibility are essential to meet and adapt the changing market conditions.

Current research

Research problems

This research project being currently undertaken is concerned with the development of the tourist industry in Libya, which has splendid tourist assets. These assets in the shape of scenery, culture and history need to be projected through policy and planning measures to sustain tourist growth in the country.

There is a need to conduct research in order to find out the root of problems hindering the development of tourism in Libya.

Strenuous efforts are therefore being made to improve the tourism sector in Libya. Nevertheless, in spite of the considerable care, which is being taken to put the policies of the General Board of Tourism (GBT) into effect, the absence of both foreign investment and financial support from the Libyan private sector is delaying the process.

Research aims and methodology

The research aims to identify implications for improving planning and policy making within the tourist industry in Libya. A triangulation approach method was adopted in the study using qualitative (interview), quantitative (questionnaires) and observation. Postal questionnaires were sent out to 36 tour operators/travel agents in the UK. Of these questionnaires, 15 were returned. Only 5 of them were answered by tour operating companies who sell Libya as a tourist destination, whilst 10 of these questionnaires were answered by tour-operating companies who do not sell Libya as a tourist destination. The purpose was to identify the major reasons for the observed small share that Libya possesses of the UK's tourist market. The websites of both the UK's tour operators featuring Libya and other countries as a tourist destinations, and tour operating companies' administrators in Libya were a major source for the author to find out the names and addresses of tour operating

companies in the UK engaged in package tours to promote Libya as a tourist destination, as well as the ones, which have never sold Libya as a tourist destination.

The delivery and collection questionnaire was directed at international tourists visiting Libya. Finally, a total of 282 usable questionnaires were entered into the analysis. Its aim was to research what image and expectations international tourists have about Libya and to find out the degree of satisfaction with Libya as a tourist destination.

A set of interview questions, was directed to key tourism administrators in Libya in order to conduct face-to-face interviews. These included the Libyan General Board of Tourism (GBT) and other provincial tourism boards, local tour operating companies and local hotels. The majority of those key tourism administrators were representatives on the board level of their associations. The sample included five tourist boards, five local tour-operating companies and seven local hotels. The objectives were to understand how they perceive international tourism and evaluate the tourism related problems and potential. In addition, an objective was to assess the level of marketing activities and promotional strategy undertaken by those various tourism bodies.

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