

Unexploited Business Opportunities: Attracting Islamic Tourists to Australia

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ABSTRACT

Aim: to attract Moslem tourists to Australia as this sector is an unexploited market in an environment of Islamic distrust caused by recent bad publicity.

Method: Survey the literature to extract the latest pertinent factors like drivers and key factors, select an appropriate theoretical framework and find the most recent tourist strategic plans capable of adaptation to suggest directions to the industry.

Result: Exploratory analysis guided by Winnett's Framework to organise present recent empirical data and application of this latest data to synthesise a new relevant strategic plan, taking into account Muslim values, their wealth, focal relevant sporting events, competing products to consider.

Findings exploratory conclusion: suggested vision, strategic goals, priorities, strategies and objectives to be executed, given that available access and a large amount infrastructure already exists ready to be developed or further exploited by innovative partnerships. (147words)

Key Words: Marketing, Australian Tourism, Islamic world, strategic plan, Muslim prejudice

Introduction.

According to the 2013 Australian Bureau of Statistics (ABS) tourism adds \$112 million per day to our Australian economy, beating such primary industries as agriculture, fishing and forestry, as well as construction and transport. Andrew McEvoy, the managing director for Tourism Australia said, "Last year was a record for international visitors, up nearly 5 per cent to 6.1 million, with the country showing little sign of losing its global appeal" (Upe, 2013). The inbound tourism industry covers 27% of tourism GDP and is our biggest services export at AU\$23 billion although affected by heavy tour/airline discounting to competing alternative destinations in the leisure market (Tourism Research Australia, 2011).

Cities world-wide have either the latest world-beating, modern man-made structures, like Dubai's Burj Khalifa, Burj Al Arab and Palm Island (Tour Advisors, 2013); or historical structures such as the Egyptian Pyramids, the Athenian Acropolis; or landmark icons like the Eiffel Tower, Big Ben, the Tower Bridge or the Statue of Liberty as a "must see" draw for tourists or they offer glimpses of enticing cultural riches. But other possibilities than history, discovering new cultures and innovatory architecture exist for the global urban Arab population because, since 2010 more than half the world's population live in urban areas (WHO 2013) particularly those originally from in desert areas may long to escape to natural beauty (Kaiser, 2012). Australia offers unique landscapes, culture, flora and fauna which must be publicised because ancient cultures, originality, novelty and uniqueness have great tourist appeal.

1. The present Australian view of Islamic people

1.1 Australian growing Islamic numbers.

Islamics showed a growth of 40% (39.92%) since the 2006 census five years ago and are becoming more visible, particularly with the hejab.

1.1.2. Racial profiling developed

Before the two Gulf Wars (1980-1988 and 2003-10), bisected by the attack on the World Trade Centre in New York on September 11, 2001 (CNN) and the American-led War on Terrorism in Afghanistan (2001- 2013) with Saudi Arabian Osama bin Laden as World Terrorist Enemy number 1, the Arab world was portrayed in the media and thus perceived in the Western mind as a welcome supplier of oil. (New World Encyclopedia, 2005, 2007). Otherwise, glimpses of keffiyeh-clad men in dishdashas and veiled women were the common curious perceptions of Middle Eastern inhabitants: innocuous, mysterious and exotic Muslims. Since 1980 the constant and relentless media-fed negative image of Muslims associated with terrorism, peaking with the attack by Islamic fundamentalist terrorists on the World Trade Centre on September 11, 2001 ("9/11") which, using media

manipulation focused on Iraq caused Australia to form part of the “Coalition of the Willing” as indicated in 2004 by present US. Secretary of State John Kerry: “ ...when we went in, there were three countries: Great Britain, Australia and the United States...” speaking in the 2004 Presidential election. Australia withdrew from Iraq by August 2009, and from Afghanistan in 2013, the latter with a regularly publicised loss of 40 peacekeeping personnel. However, the notion persists of Middle Eastern Islamic people and nations being “the enemy” in spite of our nearest geographic neighbour being Muslim Indonesia. After 10 years of Afghanistan war humanitarian involvement and relentlessly biased reporting, “Arab” still generally equals enemy (or Al Qaeda) (Althaus, 2008). Since the American SEAL assassination of Osama and his family in Pakistan, May 2011 the media-fed fears of terrorist attacks in Australia have been replaced in importance by economic worries of world recession, given recent American and European problems. This means media might now be persuaded to report positively to encourage this new tourism.

1.1.3 Australian perceptions persist.

To today’s 23 million Australians (Australian Bureau of Statistics (ABS) 2013), the media picture lingers yet of the world’s 1.6 billion Islamic inhabitants as associated with terrorism and this discourages any positive developments in the tourism business on both sides. Indonesia, our nearest neighbour, has the largest Islamic population of 248 645 000 – 88% Islamic (CIA, 2013 est.). Also close by is Malaysia, population 29 628 392 – 60.4% Islamic (CIA 2013 est.) and where English is widely spoken. A Map of the Muslim World lists in order the top 10 nations with the largest Islamic population as: Indonesia, Pakistan, India, Bangladesh, Egypt, Nigeria, Iran, Turkey, Algeria and Morocco (Top 10 Countries with Largest Population, updated 2012). The combined numbers provided by this website add up to about three quarters of a billion in the Top 10 in 2013 as a potential market.

Most visitors fly to Australia which has well developed international airline systems and daily flights from the three eastern seaboard capitals to the Middle East. This distance adds to travel expenses, plus higher service costs are added by hospitality services protected by a social safety net ensuring a minimum basic Australian living standard for all, with guaranteed wages and conditions to assure a relatively high standard of living. These costs are higher comparing unfavourably with Asia and the Middle East, increasing overall expenses and advantaging a competing market.

Language difficulties can be a drawback but it did not prevent a huge Egyptian or Syrian (pre 2012- 3) tourism industry where Arabic is the first language, to be supported by Western tourists. Indonesia, UAE, Turkey and Malaysia are also very popular destinations though English is a minority language there. Italy, China, Japan, Thailand, Russia and South America also have the urban, historical, cultural and natural resources which continue to draw huge tourist populations because of their World (cultural) heritage standings, natural features and cultural novelty; they cope well when tour operators provide bilingual guides. Australia has a large unexploited pool of bilingual Arabic speakers.

This paper endeavours to explore the tourism market possibly contained among those Muslims who can afford travel. It proposes to change the negative perceptions of both the target Islamic tourists by further accessible information, and by positive media reporting to re-educate the Australian public, and to present a strategic plan to develop an increasingly profitable Australian industry in this relatively untapped global population market sector.

2. Literature review

Destination image was explored by Beerli and Martin (2004) to clarify formation of factors influencing destinations on pre- and post- visit perceptions and evaluations. In 2006 Chen and Tsai of Taiwan integrated image into an image- trip quality- perceived value -satisfaction-behavioural intentions” pattern.

2.1. Demand drivers and factors

In 2011 Tourism Research Australia (TRA) seeking greater government tourism receipts, reviewed international tourism demand 2000-2010, and delineated key drivers as:

1. increasing wealth in emerging trading partners
2. lower global airfares brought about by increased competition dropping fares
3. business model changes to low-cost carriers and bigger planes with leisure visitors as the target
4. experience and
5. quality as perceived by tourists.

All drivers influence tourism market opportunities. The Department of Foreign Affairs and Tourism (DFAT) has a National Long-Term Tourist Strategy working on increasing competitiveness via lower wage costs, improved products and delivery of service (TRA, 2011). However, future operator income and increased employment opportunities could result from revisiting, after visitors experience satisfaction and willingly recommend Australia as a destination..

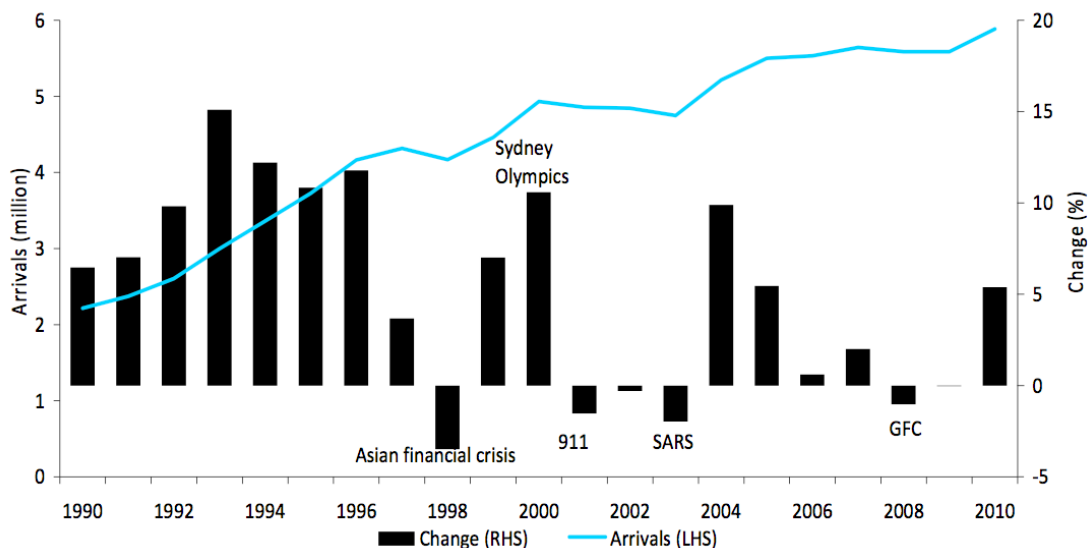
2.1.1 Factors to be considered.

Inbound tourism, according to Consumer theory states, “for any given product/service price, income, and competing products/ services are the main factors in the decision process” (TRA p.9). For Tourism specifically, the paper continues, other factors such as attributes of place to visit, airfare or land travel costs and how good the experience is expected to be influence both present and future choices, as well as disposable income, relative price compared with competitors, capacity of aircraft, season and event. Inbound passengers 2000-2010 were measured by TRA according to three categories:

- A. leisure (limited budgets but who spent most internally and have most destinations flexibility),
- B. business (destination, time limitations) and
- C. visiting friends and relatives (VRF) (destination restrictions but flexible in time of visit) (TRA p.10).

Their unpublished Figure 1 Visitor Expenditure comparison from 1990 -2010 covering all these groups demonstrates the effect of some of these factors on arrivals and profits to Australia: economic conditions (twice since 1998) and ongoing, a world Olympic sporting event, a ‘flu pandemic, and the 9/11 terrorism these four visibly effected both millions of arrivals and the rising percentage of arrivals change. Missing 2011-2013 are the continuing present world depression effects and volatile exchange rate affecting the high Australian dollar (up to US\$1.10 in the 2011-2012 period now 20cents plus less); although international arrivals in 2012 still rose 5% (ABS, 2013).

GRAPH- Figure 1 Change in arrivals and expenditure (1990 to 2010)



Source: TRA (2011) Canberra p6

2.2 A theoretical tourism systems framework

Blackman, Foster, Hyvonen et al. (2004) reviewed and analysed 11 case studies in world peripheral places by adapting a Tourism Systems Framework from Winnetts’ (1992) Behavioral Systems Approach. Contributors to success were found to be management and presence of a leader (in our case only Commonwealth control is mandated and its support is required). Using public sector and private partnerships in cooperation, by further developing specialist features, attractions and destinations including infrastructure could be further developed to reach them, and success achieved utilising effective market research, involving interested communities with successfully targeted marketing. Blackman et al. outlined the barriers to success in their cases, such as infrastructure and finance lack, opposition by community, and minimal control over negative impacts (in Australia this would be only ecological damage). Other than concrete and practical published research: earlier Pearce (2002) suggested successful tourism destinations should be analysed but since the key factor was discovered by Murphy and Murphy (2002), as a focus on planning and need for management: which follows planning, hence a strategic plan is imperative. Winnett’s (1998) four-step system will be adopted to gather data, with these updated adjustments as a base to generate a strategic plan for encouraging Islamic Tourism to Australia.

2.2.1 Most recent Australian Strategic plan

The most recently available Australian strategic plan is the Tourism Western Australia (WA) state Government Plan (2013) which was designed to improve access for the disabled to their scattered and distantly situated tourism resources, across an area covering almost half of Australia.

3. Methodology

Considering drivers and factors revealed by the literature search, testing Winnett's (1994) theoretical Tourists Systems framework (Figure 3 below) to collect 2113 empirical data will provide the factual material needed to apply all these data to adapt the latest Australian Strategic plan by the WA Tourism Department (McHale, 2013). This latter plan was designed originally to make changes for the disabled in WA's tourism industry to enable its expansion. As the latest example of a tourism strategic plan, it will be adjusted to fit the wider international scene. The aim is to fulfil the special needs of Muslims and help in the aim of attracting international Islamic tourists.

4. Reasons tourists visit

For consumers, product/services price affected arrivals over the 20 years of Figure 1, therefore national wealth becomes the first factor to consider for targeting advertising. Another major factor is sporting events. In addition, outstripping competing products to attract overseas Islamic conventions and meetings by appealing attractions are factors to consider.

4.1 Wealth

TFA (2011) found: "income is the most important driver of tourism demand, followed by price drivers such as the exchange rate and airfares" (TFA p.2). CIA Factbook (2012) ranked the top 25 GDP nations and the with five of the highest emerging Muslim nations by GDP on this list are:

#1. Qatar (1.95M population and GDP \$175B) #5. Singapore (5.35M, GDP \$315B)

#9. Brunei (408 786, GDP \$21B) #12. UAE (5.31M, GDP \$257B) and #18. Kuwait (2.65 million GDP \$154B).

As a comparison USA ranked #11 with 314 M and GDP \$257T, while Australia was #21 with 22M people and \$915B.

Emerging Islamic nations became rich mainly by exporting oil, natural gas and petroleum. People from wealthy nations are more able to afford to travel as revealed in Figure 2 below. In this table (1) the 2013 CIA est. rounded total populations (CIA World Factbook) and (2) gross personal income (GDP per person) appear. There are fewer emerging target nations with a middle class, and their languages are listed (column 2) in order to help pinpoint possible targets for travel advertising for the rich either in English and/or in local language. The *Islamic Voice* journal of August 2013 lists this March 2013 (market indicator) in order of gross personal income per person for the 10 richest Muslim nations; (4) the list of their resources gives an idea of income sources other than the petro-dollars involved using US\$.

Figure 2: Table showing Ten of the World's Richest Muslim Countries

Country	Million, est. 2013 Population & (Language)	Annual \$US gross personal income/yr.	Wealth drivers: National resources
Qatar	1.7 M Arabic, English	\$ 88 918 (2012)	Petroleum, natural gas, oil
Kuwait	3.5 M Arabic, English, Farsi, Urdu	\$ 54 654 (2011)	10% world oil reserves, shipping, finance
Brunei	.4 M (2013) Malay, Chinese	\$50 506 (2010)	Hydrogen, oil, natural gas,
United Arab Emirates	5.8 M. Arabic, Persian, English	\$48 222 (2011)	Petroleum, natural gas
Oman	3.15 M Arabic, English	\$28 880 (2011)	Petroleum
Saudi Arabia	27 M (.5 non nationals)Arabic	\$24 434 (2011)	Petroleum, natural gas
Bahrain	1.28 M Arabic, English, Farsi	\$23 690 (2011)	Petroleum
Turkey	1.28 M Turkish, Kurdish	\$16 885 (2011)	Tourism, banking, construction, oil refining, petro-chemicals, auto & ship-building
Libya	6 M Arabic, Italian, English	\$14 100 (2011)	Petroleum
Malaysia	29.6 Malay, Chinese, English, Indian dialects	\$15 589 (2011)	Petroleum, agricultural products (tin, rubber, palm oil) tourism

Sources: *Islamic Voice* (2013) Gross Personal Income, National Resources; *CIA World Factbook* (2013) for Est. Populations and Languages added

4.2 Sporting Interest events to draw tourists

International Commonwealth sports provide a focus for leisure tourism.

4.2.1 International Competitions every four years.

The influence of the international Sydney Olympics, 2002 is marked in Figure 1. Celebrating other four-yearly competitions, countries from the old British Commonwealth, raised to enjoy the British choice of sports, compete in the Commonwealth games begun in 1930, based on past colonial ties and sharing the English language, hosted five times by Australia (Sydney- 1938, Perth -1962, Brisbane- 1982, Melbourne - 2006 and coming to the Queensland Gold Coast – 2018 (Commonwealth Games Federation, 2013). Other four yearly international competitions are the Summer Olympics; the multi-national, multi-sports competition been held twice in Australia: Melbourne - 1956 and Sydney- 2000 (Buchanan and Mallon, 2006). Here the whole world visits the host nation. A similar influx occurs with the Federation Internationale de Football Association (FIFA Soccer) which is the premier single international sport with many qualifying games in the different confederations: these games provide a focus for tourism to Australia depending how well the teams qualify. Australia and its Socceroos have belonged to the Asian (Soccer) Football Confederation since 2006. Many members of this group are Islamic nations and in 2013 Jordan came to play in Australia. Such team arrivals and their supporters provide a possible market for exploitation. (Top End Sports.com. 2013)

4.2.2 Annual cricket.

The British game Test cricket (over five days) draws large numbers of Indians (Islamic among them), Sri Lankans, South Africans, West Indians, sometimes Zimbabweans with Islamic Pakistanis and Bangaladeshis. International Cricket Club (ICC) World Cup is an international one-day tournament challenged by all test-playing nations and others who qualify; World 20-20 is a short, big-hitting 20-over game seen as the World Cup of this 120 balls per side game form. Islamic cricket fan visitors vocally and colourfully support their teams in Australia, many visiting friends and relatives here. Most join a contingent of their countrymen at the games to support their national teams when games are in Australia. Provision of short guided tours from hotels, or longer organized tours with bilingual guides for those nationals visiting relatives and friends (VRF) this seems a waiting market asking for development and exploitation, and given that the leisure and VRF tourists have already made their way to the country and may be encouraged to see more, given the cost and distance travelled to get here and enticed by local products offered.

4.3 Competing products and services.

4.3.1 Islamic international and regional sports and competitions.

In competition to the Australian sporting destination here are the Asian Games (every four years since 1951); Islamic Solidarity Games (originated 2005 held annually) organized on religious lines and involving only the Organization of the Islamic Conference states members, Pan-Arab Games (1953, four yearly) four yearly Womens' Islamic Games (1993), both regional and confined to one sex; and possibly international World University Games (1999) limited by age group (Wikipedia, 2013).

This year Indonesia held an international Women's Beauty Pageant won by a Nigerian beauty, it required knowledge of the Koran and a reasoned explanation for wearing the hejab (Schonhardt, 2013). These religious, regional, sex or age restricted games and competitions may actually appeal more to Islamic tourists who attend to support their nation, clan or individual family, with the advantage of a common language and similar culture bound by religion. Some of these competitions might be lured to Australia as a different and new venue, given our sports facilities, top hotels and restaurants, added to unique tour programs.

4.4 Conventions, business, international service organisations and professional meetings

It is common for professional, business, service and academic groups to hold their conventions and annual meetings at venues outside the their country so that tourism sightseeing can be combined with knowledge exchange. A coming example is the World G20 Host Year in Queensland Dec. 2013 – Nov. 2014 with meetings of Finance Ministers and Central Banks in Cairns, Sept. 20-21 and G12 Leaders Summit Brisbane Nov. 15-16, 2014, involving 4000 delegates plus minders and 3000 domestic and international media (www.dpvc.gov.au/g20). Although Australia is a distant venue it has well-developed facilities and can advertise or bid more eagerly for the Arab world to host their meetings, offering facilities, entertainment, tour innovation and novelty, if guests are provided with interpreters.

5 A key: Understanding and valuing Muslim family and cultural differences

5.1 Islamic Values

Religion and its close adherence with reverence for imams and religious scholars is more serious and widespread in Islamic countries than in the Western religions. The Islamic way of life is based on following the teachings of Mohammed (PBOH) as revealed to Him by the Angel Gabriel around 600 CDE and written down as the *Holy Koran*, the *Hadith* is the story of the life, deeds and teachings of the Prophet and *Sunna* is the habitual practices and behaviour of Mohammed in his life. Religious scholars reached consensus on issues not envisaged by the first two books in the *Ijma*, *Oiyas* deduces by analogy opinions on cases in doubt and *Ijtihad* is a jurists'

independent reasoning on application of cases not mentioned in the *Koran* or *Sunna*. Together all these form the basis of Sharia law and are interpreted by imams in Friday prayer meetings for contemporary problem guidance (Gait and Worthington, 2007). This deep respect for the will of Allah gives rise to fatalism where events in life are attributed to God's will although some verses in the *Koran* emphasise free will and its responsibility (Khoury, 2001).

Status and social acceptance demands the high desirability of being overweight, indicating prosperity and health, though western values exposure among the youth has reduced this propensity. Generosity and hospitality and are highly esteemed. Public image and etiquette requires guests be honoured and respected by food rituals involving food variety, quality and quality together with sharing from common dishes, which affirm the host's social prestige. Exerting independence is discouraged because "conformity, uniformity and homogeneity are valued in the Middle East, and they are connected with social prestige and honor... it is preferable to be committed members of the family, tribe, neighbourhood/community/village or sect" (Khoury (2001) p.25).

4.1.2 Females and sex discrimination.

All females dress modestly and by law are required to be covered from neck to wrist to ankle in public, plus a headscarf or hejab. Only the husband may see his wife's hair uncovered, no other males. Generally women are well-protected from exposure to any sex activity particularly before and also after marriage in the Islamic culture. In Cairo before 9/11 many women did not wear scarves, but after this anti-Muslim feeling seems to have created a protective urge to display and be proud of their religious affiliation (separate personal observations by writer, 2000 and 2010). Many women drive cars in Middle –Eastern countries although the strongest anti-female discrimination is exemplified against the Saudi women demanding the right to drive. This was not allowed, but recent activism when one woman among the many arrested for driving their cars instead being chauffeured, was sentenced to 10 lashes, but the king intervened. Then Manal al Sharif, a divorced mother posted a picture of her driving on Facebook; she was imprisoned for a week, had to resign her government job and lost her housing; the Saudis were shamed by the force of world opinion and King Abdullah (87) has promised to allow women to stand in certain 2015 elections and to vote (McVeigh, 2012). This sex discrimination has caused some problems at the Olympic Games where womens' coverup hinders sporting performance. According to a Wikipedia article on the Olympics: in 2000 Bahrain sent two women (CNN, 2000), 2004 two Afghani women competed (BBC, 2004), in 2008 UAE (Dubai) sent two and by 2010 only Brunei, Qatar and Saudi Arabia had not sent women competitors; finally, in 2012 after pressure by the Olympic Committee which bans sex discrimination, Saudi Arabia sent two women (BBC, 2012), Qatar four and Brunei one. A Bahraini woman won the first medal for Gulf female athletes in the 2012 Games, third in the 1 500 metres (BBC, 2012). So Australians need to make allowances for covered female tourists since it is a religious and cultural necessity for women, not necessarily a preference (Khoury, 2001).

4.1.3 Disciplined children.

Discipline is quite different in the Islamic family, with the father as head of the family, being owed total obedience and younger siblings obeying the older, particularly their brothers. Women remain in the home caring for home and men doing marketing but escorting women to shops or markets only when required (Khoury, 2001). There are no teenage rebels or rudeness to elders, since age is revered and older family members are cared for in the home rather than consigned to a Retirement Village. Few sports facilities for children exist since the majority of the population live in third world conditions while the very rich upper class live in luxury with servants, for example the Saudi Royal family. If women do work, as happens among upper educated middle class in say, Oman and Jordan, grandmothers or unmarried or divorced sisters at home take care of the children because few kindergartens or childcare centres exist. The rich with two professional parents working can afford a maid (under practically conditions of slavery, compared with the West) from the Phillipines or India for housework and childcare. This well-off group is a potential tour focus.

6. Strategic Planning is the market solution

Because the Islamic rich and middle class are a practically untapped tourist resource, and the Australian tourist industry must broaden its customer base, the solution lies in developing some national or state networked partnerships and strategies to exploit the amazing natural resources which Australia offers: both green rainforest, tropical reefs and red desert. These resources extend from the underdeveloped and barely utilized continuous culture, arguably world's oldest – the 60 000 year-old indigenous population of surviving aborigines to several world-heritage-listed unique destinations, utilising existing resources, products and infrastructure; rather than competing with urban entertainment similar to those found in any of the world capitals. Since other or nearer cities offer superior ancient or ultramodern sites as competition, the Australian market should only emphasise and market its unique natural and cultural assets.

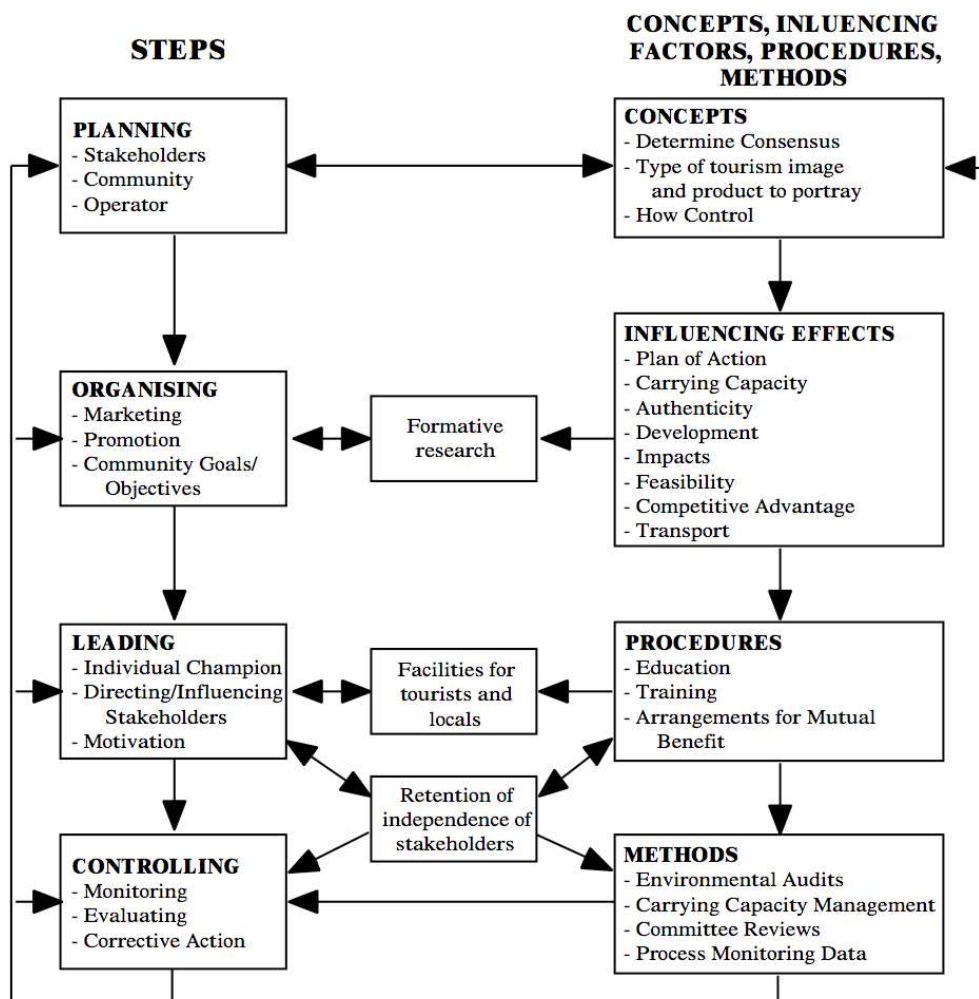
6.1. Application of broad theoretical framework

The general process for Islamic tourism development outlined below closely follows the four steps in the diagram following, Figure 1, (Winnett, 1992) applied to an Australia-wide context to suggest a useful starting point to develop a persuasive program capable of practical implementation.

Step 1 is PLANNING with an unwieldy, diverse group of stakeholders involved. These should include the federal and state and Territory Ministers for tourism. Community stakeholders might involve capital city and large town mayors, local government representatives and aboriginal elder groups. In Other community bodies involved might include AAA Tourism; airlines, bus, train and state Motoring Club representatives; Visitor and Information Centre associations; Recreation and Sporting Club networks; Parks and Wildlife managers; University Schools of (Tourism) Management and TAFE Hospitality and Tourism tertiary training institutions. Operator groups would include owners and managers of tourist attractions, particularly those indigenous owners of famous sacred sites like Uluru and Kakadu National Parks, Australian Hotels Association and motel owners, Bed and breakfast and Farmstay groups and Convention Bureaus who offer venues for international conventions and meetings.

Moving to the right hand of Winnett's framework, CONCEPTS to consider include: ways of arriving at consensus particularly among three government levels, perhaps reporting researched results to the annual Commonwealth and Heads of state annual Government Meetings (CHOGM), tourism being a Federal Cabinet ministry and part of all state government ministries. State Tourism Councils exist and the tourist revenues are important to cities, towns, villages and local governments involved. A smaller representative reference group is suggested below in 5.1.3, giving strong legally binding, coordinated and continuing leadership to develop feasible planned policies and programs aimed at maximizing the business potential of existing facilities and expanding new possibilities. The idea would be to produce a practical framework for expansion and improvement using specific objectives as part of an overall collaboratively agreed strategic plan.

Figure 3. Tourism System Framework Winnett (1992) Behavioral Systems Approach



Source: Blackman et al. (2004) p. 61

The agreed tourism image(s) need to be determined annually: whether a beach or bush emphasis, heritage or cultural sites for example, and most important in the computer Age, products appropriate for advertising, and decisions on how to control and reinforce the most desirable images online and in tourism and travel company brochures.

Step 2 is ORGANISING developing and delivery to the area/attraction, including promotion of the best, unique or novel aspects of the country determined above, and marketing these in cooperation and collaboration with the goals and objectives of the communities involved (eg. such as Yuendumu or the aboriginal elders who own Uluru). This action means input from formative research which should be based on influencing factors or effects. To the right, INFLUENCING EFFECTS feed data into the centre reciprocal research process and should base the data on an initial plan of action; basically determined by the following: tourist destinations feasibility determined by the carrying capacities; often influenced by available infrastructure such as transport, accommodation, facilities which should be attractive and modern in design, benefitting both local day-trippers and overseas tourists with provision of water and shelter; more ambitious buildings often require air conditioning and halal meals; available labour and stage of development eg. Clive Palmer's recreation of the Titanic, and planned upgrades. Also to be considered in natural areas is the impact of tourism numbers on the ecology; and planned future development of undeveloped or inaccessible attractions. Missing is availability of employees, specifically bilingual ones. These factors give varying competitive advantages to different states and regions, often determined by distance from the major airline landing points in the three largest east coast capitals.

Step 3 is LEADERSHIP (the factor Blackman et al. (2004) found the greatest lack). This requires either a strong minister(s) who can legally direct, personally influence or inspire stakeholders with motivation or funding to make the best possible effort to facilitate the ongoing and developing industry. See first point in 5.1.3 below. In the Australian free enterprise system, this often means government provision or subsidising of facilities for tourists (eg. Information Centres) and for provision by entrepreneurial locals, or providing seed grants to individual operators, which is later repaid or reaped in the form of 30% company taxes on profits.

To the right, the PROCEDURES together with factors in steps 3 and 4, all this development is linked to central reciprocal retention of independence of stakeholders (facilities being usually run by private enterprise/families). Central and local planners must ensure the provision of education and training of staff, usually provided by TAFE tertiary courses, specifically including basic knowledge about the Muslim cultural expectations, as well as hospitality and tourism services generally. Another task not on the generalised framework is finding and encouraging bilingual workers (Muslim students between semesters for example), all these generally making arrangements for the mutual benefit of service providers, employees and tourists.

Step 4 is CONTROLLING, monitoring tourist numbers and satisfaction, tour organiser and employee satisfaction, and based on evaluation and taking and corrective action based on actual annual data from feedback. To the right the METHODS in the right box of acquiring control data might include environmental audits of sensitive areas, better managing carrying capacity here, annual reviews which include data input from tourism industry stakeholders, communities and operators plus feedback from tourists, and this can be processed to improve services locally and by the controlling leadership group.

6.1.3. Analysis of lacks in the older framework

Like all good theories Winnett's (1994) Tourist System Framework, though nearly 20 years old, remains useful. It is a broad process which needs to be further refined into the material for a strategic plan developed by appropriate leadership and inspired by a vision to achieve practical outcomes.

Additionally the following four points might be updated or re-emphasised. First in Planning more emphasis needs to be placed on setting up of a smaller but representative *reference group*, from among the unwieldy number of those involved. Perhaps using interest as a filter, or using a few representatives of Winnett's three Planning levels of Stakeholders, Community and Operators, the reference group could (1) identify the latest key issues (2) provide answering strategies for tourist demands and (3) organise projected future problems. Such a reference group, perhaps called the National Joint Islamic Tourism Reference group (within a more general Tourism Enhancement Group) could devise the strategic plan for required action guided by a *vision* of making Australia ***the most improved global destination for Islamic tourists***. *Vision* should be included as a heading in Concepts and added to "plan of action" as a major focus for thinking. Alternatively "vision" might be added to Motivation in the Leading box.

Second *communication* could be added to Organising, it is not stressed sufficiently because when this framework was written internet applications were not available. Given the advantages of universal computer access to tourism advertising today, accurate information on access to destinations and products should now be made available using computer information, a GPS or sat. nav. for location guidance, plus Apps making Marketing and Promotion more accessible.

Third, Influencing Effects need updating and emphasising in execution from Winnett's Organising area; the resources are available, the *employee pool* is available for training in the form of unemployed school leavers or bilingual students and migrants so the tourism entrepreneurs and operators need to expand their vision and widen customer base and casual employee possibilities to tap this international expanding market, provided they can meet and satisfy new customer needs.

Fourth, under the heading of Procedures, education and training need to be continually catered for by central leadership and updated in the area of *cultural awareness* to overcome prejudice and xenophobia.

6.2 Suggested Strategic Plan, vision, goals, priorities, strategies and objectives

For a Strategic Plan the vision could be ***making Australia the most improved global destination for Islamic tourists***. This leads to:

Goal 1: to provide awareness training to enable Islamic visitors to share similar welcome and enjoyment with other global tourists

Goal 2: to facilitate creating innovative federal, state and local level partnerships; cooperating in developing enabling strategies to reach new global markets.

Priorities for action: develop *strategic directions* in three ways –

Customer service excellence – know Islamic customer requirements

Improve and develop tourism capacity and products with government support to further build needed infrastructure and services

Provision of easy-access online information for hotel/motel information, in Australia-wide visitor centre information booths by advertising day-trip packages and longer packages. These are normally in English, make them optionally available in the Arabic language; provide a sat. nav. App in Arabic available in Australia and overseas.

1. **Strategies** for customer service excellence:

Ways to encourage improvement are -

Objectives: (i) to use specific industry awards to recognize excellence in service

(ii) to provide appropriate accommodation considering the modesty of women, and providing halal meal options and non-alcoholic beverages

(iii) to develop a system of halal meal accreditation for restaurants and menus, and food outlets

(iv) to ensure suitable training and culture specific information for management, service operators and staff of State Visitor and Information Centres and utilise and exploit the 1.4% Arabic as first language speakers for guides

(v) to annually monitor results in Islamic tourism, successes, emerging needs, so progress is checked and the strategic plan and program can be updated

2. **Strategies** for capacity development:

Build tourist business capacity and increase Islamic niche product numbers and variety of offerings by -

Objectives: (i) to make tourism operators increasingly aware of rich potential of the Islamic market

(ii) to use awareness training and networking to raise the profile of the Islamic tourism industry in the wider market

(iii) to build greater capacity with attractive, stylish buildings to accommodate the Islamic market and benefit all other tourism stakeholders

(iv) to integrate appropriate and sensitive training for this market, including appropriate, unbiased media reporting

(v) to encourage government-stimulated innovative or new partnerships and strategies which will create Australia as a world leader in tourism for Muslims

3. **Strategies** for information communication:

Objectives: (i) to publicise suitable existing halal facilities to tourism operators

(ii) to facilitate and advocate for Arabic language information to be available in Australian mainstream tourism information systems, and provide and promote selected for targeted Arab language data systems

(iii) to use tertiary and research systems finding ways to maximize benefits to operators and communities; follow up by demonstrating and publicising this data in the media

(iv) to encourage interested operators to market their destinations, features or attractions, accommodation for tourists through travel and hotel information systems

(v) to attract conventions and international meetings to Australian capitals and appropriate tourism sites by advertising internationally (some ideas partly adapted from Mc Hale, 2013).

7. Conclusions

To exploit this expanding market including aging and rich people and add value to our natural tourism resources, the first obstacle is attitudinal change in both market and operators. The available natural resources, infrastructure, managerial experience, unemployed personnel pool, education and training facilities, bilingual

casual labour and willing government assistance together with partnership possibilities to development innovative products are all present. All that is needed is strong determined leadership to bring about attitudinal change through media opinions; provision of bilingual tour guides and their training; hotel, computer and Centre language facilities for Islamic visitors; together with expanded development and exploitation of existing facilities, particularly involving the indigenous people and the resource they provide both culturally and in terms of areas under native title. Novel places to visit and new cultural experiences are unique factors encouraging tourism. Hospitality education for our first peoples is vital as is also their understanding the essentially family and tribal ancient shared values with the Islamic visitors, many not far removed from nomadic lives

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