

DEVELOPMENT OF A TOURISM DESTINATION

Case: Erbil the capital of Kurdistan, Iraq

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ABSTRACT

Tourism is one of the world's fastest growing industries and tourism is a common national income especially in developing countries. Middle East is as a region known tourist attractions and also Iraq has its focus on tourism. Erbil the capital city of Kurdistan in North Iraq was chosen to be tourism capital of Middle East for 2014.

The purpose of this thesis was to study the development of a tourism destination and research the development of Erbil the capital city of Kurdistan. The aim was to search how Erbil has become a tourism destination and to evaluate the potential of Erbil to become a known tourism destination. This thesis operates as a tool for my commissioner: Kurdistan's General Board of Tourism so they can use it for developing the tourism in Erbil.

I chose qualitative interviews as my research method. The interviews were conducted by one- on- one interview during the spring 2015 in the region of Kurdistan. Interviewees were local authors, companies and entrepreneurs. All in all, I conducted nine interviews. The results are divided in three different themes as the questions were.

The key finding of the research was that Erbil's development has been quick and short and it was growing still before ISIS, the terrorist group attacked. The main deficiencies on what my commissioner should focus on are the skills of tourism employees, infrastructure and services. The main factors needed for development to continue are breakaway from Iraq, tourism employee's education and keeping the current political stability and security. Now the development has stopped for unpredictable period of time. Nevertheless, the results are showing that Erbil has all the factors to continue the development in the future and to be a known tourism destination.

Key words: destination development, tourism destination, Middle East, qualitative research

Lahden ammattikorkeakoulu

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TIIVISTELMÄ

Matkailu on yksi maailman nopeimmiten kasvavista teollisuudenaloista ja matkailu on yleinen elinkeino etenkin kehittyvissä maissa. Lähi- Itä on alueena tunnettu sen matkakohteista ja myös Irak keskittyy matkailuun. Erbil Kurdistanin pääkaupunki Pohjois- Irakissa, valittiin vuoden 2014 Lähi- Idän matkailupääkaupungiksi.

Tämän opinnäytetyön tarkoitus oli tutkia matkailualueen kehittymistä, sekä Kurdistanin pääkaupungin Erbilin kehittymistä. Tavoitteena oli tutkia, kuinka Erbilistä on tullut matkailukohde, sekä arvioida Erbilin mahdollisuuksia tulla tunnetuksi matkailukohteeksi. Tämä opinnäytetyö toimii työkaluna toimeksiantajalleni, Kurdistanin matkailuministeriölle, jota he voivat käyttää Erbilin matkailun kehittämiseen.

Tutkimusmenetelmänä opinnäytetyössä käytin laadullista menetelmää, teemahaastattelua. Teemahaastattelut toteutettiin henkilökohtaisina haastatteluina kevään 2015 aikana Kurdistanissa. Haastateltavat olivat paikallisia päättäjiä, yrityksiä, sekä yrittäjiä. Kaiken kaikkiaan sain kerättyä yhdeksän haastattelua ja tulokset jaettiin kolmeen eri teemaan, kuten kysymyksetkin.

Keskeinen havainto tutkimuksessa oli se, että Erbilin kehitys on ollut nopea sekä lyhyt ja kasvu jatkui, kunnes terroristi ryhmä ISIS hyökkäsi. Tärkeimmät puutteet, joihin toimeksiantajani pitäisi keskittyä ovat matkailualan työntekijöiden taidot, infrastruktuuri ja palvelut. Päätekijät, joita tarvitaan kehityksen jatkuvuuteen ovat irtaantuminen Irakista, matkailualan työntekijöiden koulutus sekä turvallisuustason ja vakaan poliittisen tilanteen pysyminen nykyisenä. Tällä hetkellä kehitys on pysähtynyt määrittelemättömäksi ajaksi. Siitä huolimatta, tulokset osoittavat, että Erbilillä on kaikki tarvittavat tekijät jatkaakseen kehittymistä tulevaisuudessa ja tullakseen tunnetuksi matkailukohteeksi.

Asiasanat: matkailukohteen kehittyminen, matkailukohde, Lähi- Itä, laadullinen tutkimus

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1 INTRODUCTION

Tourism is one of the world's fastest-growing industries and tourism destinations are born globally all the time. More and more people are travelling and destinations have understood, that they can make tourism as a source of national income. (Roland Berger strategy consultants 2014.)

But what does it take to become a tourism destination? What kinds of factors are needed for the development? This is what I am going to figure out in my research. Also Iraq, which can be hard to believe, has its focus on tourism. Especially Kurdistan's semi autonomous region in Iraq has boosted its economy and international companies have run a race to the region. More companies, more people who need accommodation, catering and entertainment options. People are also looking for new destinations to explore and the Kurdistan region has it all to be a tourism destination. (Kurdistan's General Board of Tourism 2015.)

1.1 Aim and focus of the study

This thesis focuses on the case of Kurdistan's regional capital of Erbil, which is located in North Iraq, 354.8 kilometres north of Iraq's capital Baghdad. Appendix 1. Kurdistan as a region has always been known as the peaceful area in Iraq and stands out from the rest of the country with a good economy and safety. These factors together with oil and gas have brought lot of western companies to the region and due to these new people in the city all the services have grown greatly (Kurdistan's General Board of Tourism 2015). Erbil the capital has changed from a village to the "next Dubai" in a few years. And this is the reason why I focus my work on this specific city. We can tell that there is a lot of business tourism in the city with 600 hotels and with 70% occupancy but what about other tourism? (Rotana Hotel 2015.) This thesis concentrates on these questions:

- How Erbil has developed into a tourism destination?

- Which kinds of factors are needed for the development in a future?

The aim is to evaluate potential of Erbil to become a known tourism destination. This thesis also includes an analysis of nine qualitative theme interviews, which the author conducted with local tourism companies and entrepreneurs in Erbil during spring 2015. The interviews lasted from 20 to 60 minutes and were semi- structured interviews. A thematic semi-structured interview is the best method to interview small groups of people who come from the same industry. Thematic areas are pre- defined, but their order and extent vary according to the interviewees (Aaltola, J. & Valli, R. 2007). Also my own observation in the city was an important researching method. These combined with theory and existing studies are used to determine whether Erbil could be a tourism destination, and also point out the successes and deficiencies in the tourism business. This thesis's aim is to operate as a tool for Kurdistan's General Board of Tourism, that they could use for developing the tourism in Erbil. Finally, it aims to show the required activities needed for its development. In this way this thesis can help to measure possibilities for a similar destination to become a tourism destination.

1.2 The commissioner

The commissioner is Kurdistan's General Board of Tourism, ministry of the municipalities and tourism, whose work is to manage and market travel and tourism in the Kurdistan region, as well as introduce it to the world. Kurdistan's General Board of Tourism is the only ministry with ISO certification in Kurdistan. The board has a long-term master plan for the next 25 years and currently they are working to achieve all the factors from the plan. Making Kurdistan known internationally is an important part of the master plan. (Kurdistan's General Board of Tourism 2015.)

The board is implementing many comprehensive activities and projects, and preserving and restoring the tourist attractions and the region's heritages. The board develops the region's tourism in many fields such

as sport events, religion, heritage sites, tourist attractions, historical places, holiday vacations and so on. Their vision is for tourism to become a lasting and a sustainable primary source of national income for the Kurdistan region. Their mission is to develop the administrative framework for marketing and planning of the tourism sector; strengthen partnerships with the private sector and local communities to develop services; and to develop tourism facilities in accordance with international quality standards. (Kurdistan's General Board of Tourism 2015.)

I contacted the board myself and I presented my idea for the study. The board was glad to help. The board gave their support for this thesis and a lot of material to research the subject. Appendix 2. I met the head of the board Mr. Mawlawi Jabar Wahab and I interviewed the head office manager Mr. Sadraddin Othman Hamza and his assistant.

2 TOURISM IN THE MIDDLE EAST

Before the journey to Kurdistan, a review of the literature evaluating the concepts of tourism in the Middle East and tourism destination development is found in chapters 2 and 3. First it is important to make clear what tourism is in general in the Middle East region, so we can understand its position in global tourism. Showing statistics and barometers help the reader understand the size of the business. The second subtitle takes us to Iraq to see what the tourism business is locally in Iraq. For the last subtitle I have separated Kurdistan region from Iraq to clarify Kurdistan's position in the tourism industry. Basic knowledge about tourism in Iraq and Kurdistan is needed to understand the situation of Erbil later in the study.

Tourism is one of the biggest growing industries in the world and known as a primary income source and most important source for large number of countries. This is usually the case in many developing countries (Roland Berger strategy consultants 2014). Also in Kurdistan where now oil is the biggest economic resource the wish is for tourism to be the main income source after oil. (Kurdistan's General Board of Tourism 2015)

Tourism is growing fast and international tourist arrivals grew by 4.4% in 2014 to 1,135 billion and will reach 1.8 billion international tourist arrivals by 2030, according to UNWTO's Tourism highlights 2014. Tourism is connected to the economic situation of a country, which makes tourism business easily changing: volatility and global competition make tourism business very difficult. (UNWTO Tourism highlights 2014 2014.)

Why does tourism industry then matter? When tourism developed correctly, it has improved a country's condition in many ways, from infrastructure to offering jobs. From figure 1 we can see global tourism in numbers. The share of tourism in economic welfare in the country depends on the quality and the amount of revenue tourism brings. (Why Tourism? 2015.)



Figure 1. Why Tourism matters? (Why Tourism? 2015.)

2.1 The Middle East as a tourism destination

The Middle East as a tourism destination area can be well known to many of us. Turkey is known for its beaches, Jordan for Petra, Egypt for pyramids and Dubai for its wealth. This can be some of the ideas, which are generally conceptualized when we think about tourism in the Middle East. But it is also so much more and includes many new growing destinations.

Tourism in the Middle East can be divided into two categories: the first category consist of countries with rich tourism history due to various cultural heritage, history and archaeology such as Tunis, Jordan, Egypt, Lebanon, Iraq and Turkey. The second category is countries with irrelevant incoming tourism as in Gulf countries such as Saudi Arabia, Qatar, Kuwait and the UAE (United Arab Emirates). Most interesting and

popular sites in the Middle East have always been religious and ancient monuments, such as the pyramids, ruins, temples, old cities and so on. In the beginning of the 20th century, a typical trip from Europe included for example ancient ruins in Egypt and the biblical sites of Palestine or Syria, which were the highlights of such tourism. Marketing in this time was showing the Middle East as a very romanticized and magical land where time had come to a halt. Thomas Cook was responsible for the marketing of the Middle East to Europe and was also responsible for the development of mass tourism in the Middle East in the beginning of the 20th century. (Daher 2007, 4–7, 41–42.)

The Middle East has succeeded in the field of tourism for many reasons. One is the landscape, locations and sites, which have attracted international tourists during the decades. Also the incidence of regionalized or domestic tourism in the Middle East has been important. Tourism in this regional has increased due to the remarkable level of Arabs preferring not to travel to European or American destinations. This is because of many reasons, such as strict visa regulations due to 9/11. That is one of the reasons why locals do travel more inside the region and big destinations like Dubai do increase its services to please all the visitors. And one of the biggest reasons is the organization of tourism. The level of investments and development are massive across the whole Middle East including modern, capital intensive, high-rise hotels and skyscrapers, especially in the Gulf States. (Daher 2007, 42–43.)

In 2013 the Middle East had mixed and volatile results in an area due to the ongoing tension in some destinations. International tourist arrivals (overnight visitors) grew by 5% worldwide but in the Middle East region the number of international arrivals remained stable. In 2013 in the Middle East there was international tourist arrivals of 52 million (0% growth), which were 5% of the market share and international tourism receipts were estimated at 47 US billion dollars, which was 4% of the total market share. Figure 1 shows the numbers of tourist arrivals globally in 2013. Compared to 2012 the Middle East's tourism receipts were down 2%. The change for the last year was – 0.2% and the average annual growth was

4.5%. From the Middle East Turkey was the only country, which made it to the top 10 ranking by international tourist arrivals. Appendix 3. (UNWTO Tourism highlights 2014 2014.)

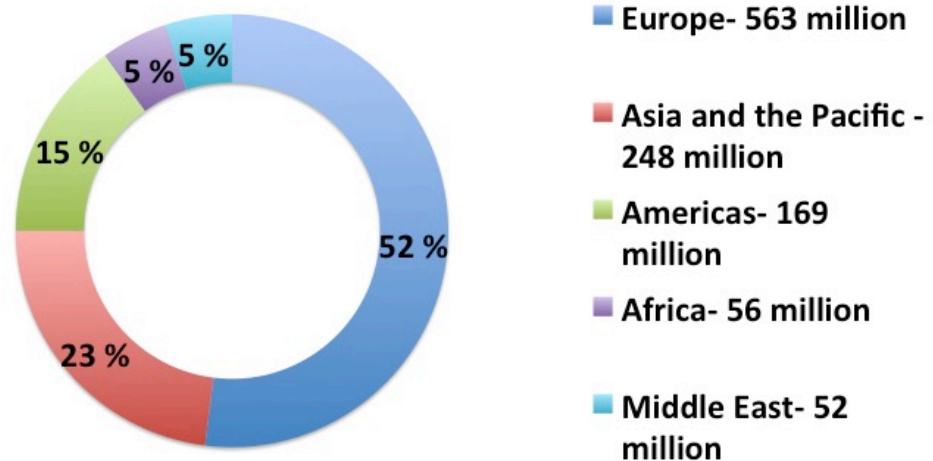


Figure 2. International tourist arrivals 2013. (UNWTO Tourism highlights 2014 2014.)

Results varied across every destination. The United Arab Emirate of Dubai grew strongly by 11% while Palestine (+11%) and Oman (+8%) also had a good growth. Other destinations faced declines. Among others, Egypt had a significant drop in arrivals because of political tension in the country. Also Lebanon and Jordan suffered from the conflict in neighbouring Syria. (UNWTO Tourism highlights 2014 2014.)

The Future of Travel and Tourism in the Middle East- A Vision to 2020 (2007) shows a good perspective how travel in the region could develop and what the visions for this region are. This research includes Bahrain, Egypt, Iran, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria, Turkey, Yemen and UAE. Across this region, countries, states and cities are having a program of investment and development to increase capacity, improve infrastructures and grow tourist numbers and revenues.

According to estimates, over the next 20 years, upwards of 3 trillion dollars is going directly into leisure and tourism and indirectly into the supporting infrastructure. By 2020 the region will add airport capacity for 300 million extra passengers, build over 600 new hotels, add 650 000 additional rooms, grow visitor numbers to 150 million and increase the size of its aircraft fleet by over 150% by 2025. Also 390 billion US dollar new investments are planned in these new hotels and the developments they form part of. All this means between 500 000 and 1 million extra staff will be required just for these new projects, according to the WTTC (World Travel & Tourism council) estimates of 1.5 million extra staff may need to be increased. (The Future of Travel and Tourism in the Middle- East- A Vision to 2020 2007.)

Due to these visions and plans concerns about the environmental impact are rising, particularly over the level of construction waste, pollution and energy and water efficiency and availability. (The Future of Travel and Tourism in the Middle- East- A Vision to 2020 2007.)

Although the The Middle East region is currently having the lowest numbers in international tourism its plans for the future can still be realized in spite of the size of the visions because international tourism continues to increase. The future in the Middle East is affected by how much the region will invest in the tourism industry and what the security situation in its countries will be. (UNWTO Tourism highlights 2014 2014.)

2.2 Tourism in Iraq

Iraq has long been regarded as the nation with more archeological and historical sites than any other country in the world. It is easy to conceive this, as it was the cradle of civilization. (Kurdistan Tour Guide 2015, 30.)

Tourism has grown greatly and it has become the national income producer right after oil. But the focus of the country's tourism sector is on religion in general and Iranians pilgrims so it has made the Iraqi tourism dependent on Irans political will and economic situation. (Adib 2013.)

Liwass Semeism, Iraq's minister of tourism and antiquities, estimates in an interview for *The Atlantic* magazine (2012) that Iraq had 1.5 million visitors in 2011 but he points out that the majority of the visitors were pilgrims from Iran and fewer than 200 tourists from western countries are expected to visit Iraq in 2012. Iranian pilgrims come to Iraq to visit the ancient mosques like Najaf and Karbala and this is where Semeism wants potential tourist to focus on: Iraq's thousands of years of civilization. The country has the main holy places of the three major world religions including the burial place of the prophet Jonah in Mosul, the birthplace of Abraham in Ur and the oldest continuously operating churches and monasteries. The ministry supports private companies to build new hotels in the "holy cities", which are expecting a huge number of pilgrims every year. Also Geoff Hann from the British Hinterland Travel Company believes in the future of tourism in Iraq. His company offers tours, which visit sites as Saddam Hussein's former palaces, ancient monasteries and many shrine cities around Iraq. Hann says: "Iraq has been formative for world culture and, indeed, world news for thousands years. This draws people and always will." (Dreazen 2012.)

But recurrent violence across Iraq in 2013 didn't give much hope for the travel and tourism industry. Car bombs and unrest were known in the east next to Syria in addition to unstable government and internal rifts brought Iraq back into the headlines, showing the country once again, even less desirable place to visit or even in which to do business. In consequence, tourism declined overall in 2013 in spite of the strong growth in the Kurdistan area. There was business in cities such as Basra and Baghdad, mostly to Sulamaniya and Erbil. (Country Report 2014.)

Also the economic crisis in Iran got worse and peaked in summer of 2012 as the currency was dramatically devalued, having a negative impact on the purchasing power of Iranians, which affected Iranian's travelling abroad. Due to this, religious tourism was most impacted by the declining number of Iranians leisure tourism from Iran to some parts of Kurdistan also suffered. If recent changes in Iranian foreign policy bring much-

needed changes to the country tourism in Iraq was expected to recover from 2014. (Country Report 2014.)

The Middle East as a tourism area has always been volatile and therefore very challenging to do business in.

An extremist Islamist rebel group called Islamic State of Iraq and the Levant (ISIL or known better as ISIS) is confusing things in Iraq. The group started to take over areas in Iraq from 2013 (BBC 2014). Ministries of Foreign Affairs from the Western countries have been against their citizens traveling to Iraq, including the Kurdistan region, since the summer of 2014 (Foreign travel advice: Iraq 2015). Right now, news around the world is showing videos of the Islamist rebel group ISIS destroying valuable cultural heritage, which are important attraction factors. According to the media, the group has destroyed among others, the burial place of the prophet Jonah in Mosul, parts of the ruins of Nineveh, ancient Hatra and many other shrines and churches (Koskinen 2015). The United Nations Educational, Scientific and Cultural Organization UNESCO calls for an emergency meeting on Iraq's cultural heritage, which are derived from up to 800 century BC, due to the destruction. (Länkinen 2015.)

2.3 The Kurdistan region

Kurdistan rests along a series of mountain ranges and encompasses a significant portion of what has traditionally been called "The land between the rivers" and "The birth place of civilization". Country to well over one thousand known archeological sites, the region's top historic attractions are the Erbil citadel, which is in appendix 4 and Shanidar cave. The Erbil citadel is recognized as the world's oldest continually inhabited city. (Kurdistan Tour Guide 2015, 30–31.)

The Kurdistan region has always been known from its safety and security because of its relative political stability and the regions separation from the rest of Iraq. The Arab Tourism Committee chose Erbil the capital city of Kurdistan, as Arab Tourism Capital for 2014. More than 40 major events

throughout the year in Erbil made this nomination possible. Also the influential National Geographic publication classified Erbil as one of the top twenty destinations in the world to visit in 2014. (National Geographic 2014.)

Large number of infrastructure improvements, for example, airport, road and travel accommodation investments are planned in the Kurdistan region, more specifically in Erbil. (Country Report 2014.)

The growth of travel accommodation infrastructure has been huge as cities as Erbil are undersupplied to meet the rapid growth in the number of domestic and international tourists. Most of new hotels are 4- 5 star hotels equipped with business facilities and offering numerous services. The first 5 star hotel brand in Erbil was The Rotana brand offering a variety of services. Since then many international brands have targeted Kurdistan, including the Hilton, Sheraton, Marriot and many others. With more than 600 hotels and occupancy exceeding 70%, Kurdistan has a very attractive market (Rotana Hotel 2015). Tourism in Erbil has been viewed as an alternative approach in economic and environmental development as well as in the social and cultural aspects. On the top of Dubai, Beirut, Oman, and many others, Erbil had become the best in tourism rapid development. (Country Report 2014.)

The opening up of Kurdistan has created new opportunities for niche tourism, for example adventure tourism, which is possible with diversity of nature across of the region. The region attracts, for example, backpackers with diversity as well as with the charm of novelty. Some operators have begun taking on the challenge, but large parts are still untapped so it offers great potential to newcomers. Business travel packages to Kurdistan targeting MICE tourists (meetings, incentives, conferencing, exhibitions) are expected to be increasingly popular. (Country Report 2014.)

3 TOURISM DESTINATION DEVELOPMENT

In this chapter we are going to see what tourism destination development is. I am going to present two different kinds of models, which measure the development of a tourism destination. Later in this thesis, development of Erbil will be compared to these models and theory in general.

This thesis focuses on the development of a tourism destination so before telling more about it, it is important to make clear the definitions of development itself, tourism destination and what development of a tourism destination means. In subsections I go through important steps of tourism destination development: destination planning, identity and evolution.

New tourism destinations are born around the world all the time. Destinations are born; they grow, change and get to the point when the development can remain stable, decline or increase. But in tourism development there are always two sides of a coin. It can offer jobs and increase revenues but on the other hand the benefits are not always equally distributed. This does not mean that the destination development is pointless but tells that it must be built correctly so the area will be able to benefit from the development.

A tourism destination is basically a geographic area, which attracts visitors; it can be an individual country or a city. Usually a tourism destination has different types of accommodation and other facilities such as restaurants. Visitors can also be day visitors, when accommodation is not needed. Tourism destination can be also identified from its marketing efforts and local tourism stakeholders. (Morrison 2013, 4.)

Tourism destinations have got the attention of tourism researchers for a long time and there is plenty of research on this topic. The ones I am going to focus on in my study are the models of Prideaux (2000) and Butler (1980) (Prideaux 2009, 33). I am interested in testing these models and comparing these to my case, the city of Erbil. One of the best known is Butler's model because he extended the concept by combining

development theory with the theory of the product life cycle to make a model, which shows the destination life cycle. Butler's tourism area life cycle (TALC) model has also been widely tested in the literature.

3.1 Destination planning

Visitors do need something to see and something to keep them occupied when they are in a destination. They need a place, which is different from their home, why travel otherwise? Destination planning is all about creating this place: building on the unique geography, history and cultural traditions. Destination planning is about setting goals and objectives, understanding trends and the present situation in a market, identifying options, recognizing constraints and recommending action. When the planning is done well, development will be better in projects and will create excellent tourism service. Destination planning and management are keys for a long-term sustainability of tourism and must be remembered at every level. (Godfrey & Clarke 2000.)

Community has an important role in a destination. They are responsible for example for transportation, catering, accommodation, information and all the other services in a destination. It is the community's culture, environment, people and history, which tourists come to see. When working with a destination planning and management is important to remember the community. Where there is tourism development, it can make a change in the way we use resources to serve the tourist market. For example, an old shop in a bazaar can be changed into a traditional teahouse, which can be really exotic for a tourist. The facility may still exist, but the original function has been replaced by something new. Tourism destination planning is about managing this kind of change in a way that brings the best benefit to the community with minimal cost. Good planning takes care that the local community accepts the possible changes. It is responsible for understanding and appreciating the impact tourism can have on local life, nature and cultural resources. (Godfrey & Clarke 2000, 2–4.)

Every destination also needs to have a long- term tourism plan, which is a shared strategy for all stakeholders to follow for the future. A tourism plan or a tourism master plan is a long-term plan for 10 years or more. Other plans are called tourism strategy, which is a medium- term plan for 5-9 years and tourism action plan, which is a short-term plan for 2-4 years. Tourism planning has many obvious benefits; just a few are seen from Figure 2. (Morrison 2013, 11.)

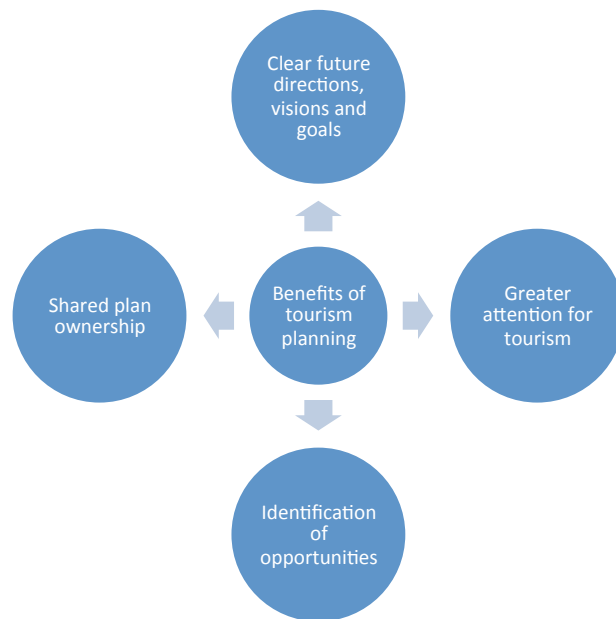


Figure 3. Benefits of preparing long- term plans for tourism. (Morrison 2013, 11.)

3.2 Destination identity

The most successful tourism destinations are the ones, which do have something unique: they have a sense of place and an identity, which is different from its competitors. It is easy to do benchmarking and take inspiration from similar destinations, which are successful destination

should always focus on its identity and unique factors. The problem is there are never two destinations exactly the same not in terms of what they can offer or whom they attract. Even if destinations are very similar to each other, it does not mean equal success in the tourism business. Destinations should not focus on the similarities but on differences. From differences they can find their way to success. (Godfrey & Clarke 2000, 7.)

Destination is usually the unit of action where companies, service providers, organizations, locals and visitors, interact through the co-creation of experiences. And tourism is always more than a product, it's an experience. When marketing or promoting a destination, the nature of the tourism destination must be understood. Tourism destinations have promoted themselves throughout the history of attracting visitors in different ways. Some destinations have become extremely popular and others have remained less familiar despite the time and money spent on their marketing. Destination branding has become very popular through the assumption that destination images are the main influence over customer choice for a destination. Many tourism destinations around the world have launched branding campaigns to differentiate themselves from their competitors and to attract more tourists. (Saraniemi 2009, 26.)

So where to start? How we can attract tourists? It is important to build an identity or an image for a destination. This usually needs activities from a destination-marketing organisation to improve positive images of the destination. These activities mean for example marketing programs, marketing communications, strategies and positioning. The aim for the promotional activities should deliver a projected and desired image of the destination. Stabler (1988) did divide the factors for the destination image formation model into demand and supply factors. This division of destination image led to two focuses; a focus on supply- side aspects, like marketing operations and a focus on demand- side aspects, like tourist decision- making. Saraniemi illustrates in figure 3, the supply- side and demand- side image concepts in a simplified form to demonstrate the main concepts on both sides. Demand- side can be tourists, potential tourists or

anyone who is receiving information about the destination. (Saraniemi 2009, 28.)

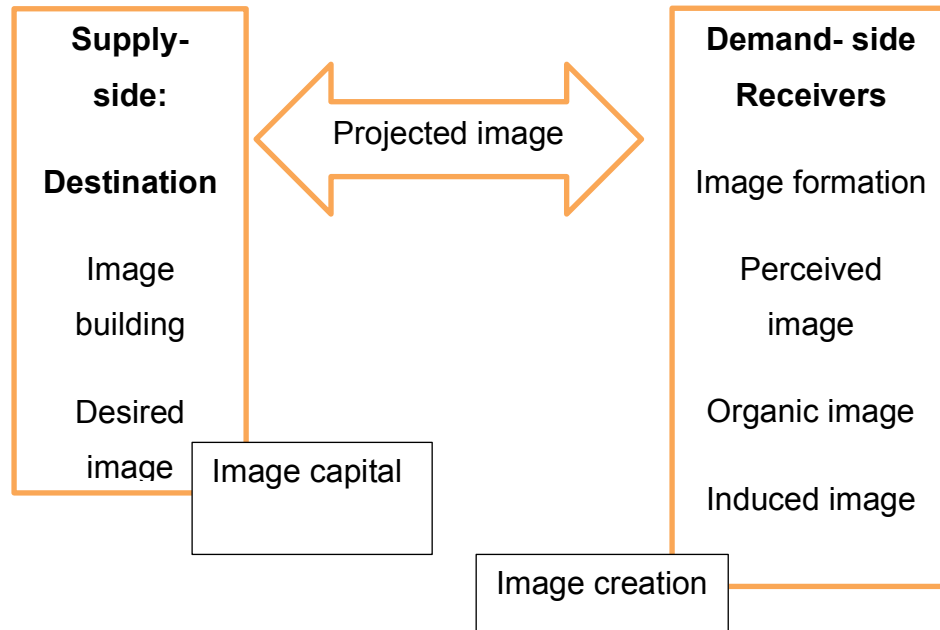


Figure 4. Two- folded image concept. (Saraniemi 2009, 28.)

One answer is to do a tourism resource audit. The tourism resource audit includes a thorough assessment of a destination's tourism supply; those factors which can attract tourists to the destination. This audit involves the analysis of what tourists come to do and see (activities and attractions), how they travel (accessability and infrastructure), how they are served (service and hospitality) and how they are informed (information). Tourism destination audits are designed to help destination communities identify what is special of them, but they also help to point out the factors, which can be missing, or need to be improvement. How to do it? First we need to collect a list about all resources, which have some connection with tourism. Second, a critical evaluation of those resources is needed. The resources need to evaluate in terms of their uniqueness and tourist appeal, quality and preliminary identification of those, which need improving. Appendix 5. (Godfrey & Clarke 2000, 7.)

3.3 Evolution of development

Destination models can be divided into ones which are relying on graphical or diagrammatic representations, and ones employing mathematical equations. Mathematical equations are mostly used to forecast tourism demand. Tourism models, which are used to explain destination development can be classified into three different groups such as geographical, economic and management and marketing models. Geographical models, which are using an element of spatial relationships and time, are the largest group to explain destination development. Economic and management and marketing models have had less attention. (Prideaux 2009, 29.)

I am only going to focus on the models, which are widely tested because there are many factors on these developed models that we must take into account before we can apply the models in practice.

Prideaux (2009) puts together the main destination development criteria, which can be also used to compare and evaluate competing destinations. If one of these criteria is missing or cannot be supported we can expect that growth will stop or will require significant efforts by the authors. There are four main themes which all do include important key criterias. (Prideaux 2009, 42.)

The first theme would be factors in a destination. This includes the main tourist attractions in a destination usually including both natural and built attractions. The natural resources are important in many ways. It is also important to know the carrying capacity and sustainability expressed as land available for development, availability of natural resources to absorb visitor flows without sustaining damage, availability of resources such as water, environmental factors and political factors. Destination should also have availability to attract new investments and have good distances between other destinations and major generating regions. (Prideaux 2009, 42.)

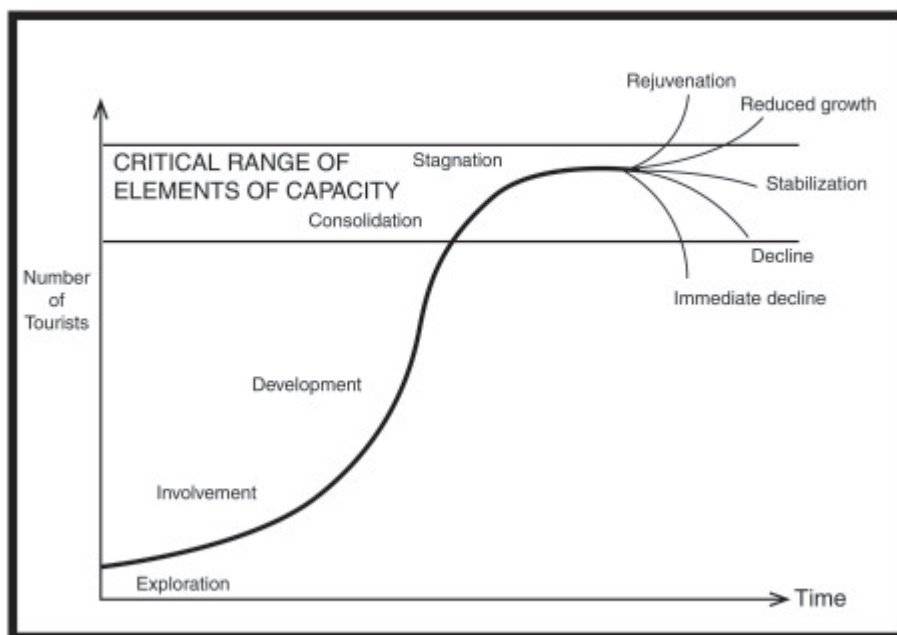
The second priority is marketing. Destination need to be available to be an effective and representative, and marketing is needed to implement with right channels of distribution. (Prideaux 2009, 42.)

The third is support. Support given by local authorities and residents. And volume of support given by regional, state and national governments for tourism development. Support also means investments like investment in new transport infrastructure. (Prideaux 2009, 42.)

The fourth theme includes external factors such as impact of competing destinations, changes in the national and international economies, ability to adapt to climate change and to potential threats. Climate change threats are, for example, increasing sea levels, changing weather and erosion. Other threats are natural forces and conflicts like earthquakes and wars. (Prideaux 2009, 42.)

Butler's model TALC (tourism area life cycle) in figure 5 is based on the product life cycle theory, which assumes that products develop through a series of stages following an S- shaped figure of introduction, growth, maturity and decline. Butler noted that in a product life cycle the sales of a product grew slowly, experienced a rapid growth, stabilizes and finally subsequently decreased. With destination life cycle it gives a similar story by starting with the discovery of the destination and the deficiencies in it (Prideaux 2009, 32–33). As facilities are provided and awareness grows, visitor numbers will increase. By marketing and dissemination of information the area's popularity will grow rapidly. Butler (2006) explains that eventually, however, the attractiveness of the area will decline due to overuse and the impact of visitors, which can also lead to the decline in visitor numbers. (Butler 2006, 4– 5.)

TOURISM LIFECYCLE



Butler, R.W. (1980). The concept of a tourist area cycle of evolution: implications for management of resources. The Canadian Geographer/Le Géographe Canadien, 24(1), 5-12.

Figure 5. Tourism lifecycle. (Butler 2006, 5.)

TALC has seven stages of tourism development, which form the shape of the development curve. The development starts with exploration by adventurous visitors, in small numbers initially, who discover the destination. They will find that the destination is unspoilt with the weaknesses of access, facilities, and local knowledge. Next step is involvement when local people of the destination start to provide some facilities for tourists: recognized tourist season will appear. The development forms when the destination starts to develop and advertise the area. Prideaux adds (2009) the growth is also dependent on accessibility, the attitude of locals, resource availability, competitors, political will and the attractiveness for visitors (Prideaux 2009, 33). Due to this processes the area becomes recognized as a tourism destination. When the area continues to attract visitors development will consolidate. In this point, some tensions can develop between the destination and tourists. Stagnation follows the consolidation: the numbers of tourists may decline because the facilities have become old and run down. In the end, the destination has three options. The development may rejuvenate if

number of visitors start to increase due to possible investments and modernization. The development can also remain stable or if the resort is not rejuvenated, decline may follow. People are losing their jobs related to tourism and the image of the destination will suffer. (Butler 2006, 5–8.)

4 METHODOLOGY

Methodology will be described in this chapter before discussing the results of the interviews. I will present my methodological choices and tell how I used them in Erbil. Also basic facts about Kurdistan are needed because Kurdistan might be an unknown destination to the reader. In the end, I will explain how I analyze the answers in the interviews so the reader could have examples how to do it.

The empirical part of this thesis consists of nine qualitative interviews with local tourism companies and entrepreneurs in Erbil. These reveal many interesting thoughts, ideas and projects, from which we can deduce the direction of development and to get new ideas how to develop. Traveling to the destination and observing my surroundings and the changes in it helped me to internalize how much progress there has been. My first visit in Erbil was five years ago so the observation then and now gave a good base to start to research the development.

Research methods for this thesis consist of qualitative interviews, personal observations, academic research and other studies. When I told them what I was aiming for and when we talked about tourism in an area, locals were pleased that my study was about Kurdistan and the fact that I was interested developing tourism in this area.

Qualitative research is substantially different than quantitative. Qualitative interviews are indepth and intensive rather than numerical as in quantitative research. The aim is to acquire subjective understanding of social reality, not statistical descriptions or overall generalizable predictions (Hirsjärvi, Remes & Sajavaara 2008, 156–157). The answers in qualitative interviews are often viewed as a whole, rather than comparing each answer with another one, although that is possible too (Hirsjärvi 2008, 158). In qualitative research conclusions cannot be made based on statistical probabilities because usually there are not enough interviews conducted to make the differences statistically significant (Alasuutari 1994, 28–29). That is not the idea in qualitative research; the

point is to get more thorough and detailed information from a lesser number of people. Qualitative interviews are based on finding differences and, particularly in this case, similarities between interviewees and their answers and then simplifying these answers to be comparable with each other and with existing theories and frameworks (Alasuutari 1994, 34).

After I had decided how to implement my research, I began to find out what my interview will consist of. To understand how Erbil has become what it is today and what the possibilities are we have to know what has happened in the history, today and what the future looks like. So the most obvious way was to build the framework from these three elements: the past, present and future. I started with the literature part on January 2015 and on February I approached my commissioner and after that I sent requests for the interviews. On tenth of March I travelled to Erbil and on the next day I met my commissioner and I had my first interview with them.

4.1 Thematic interview

The qualitative interviews in this thesis were semi- structured thematic interviews. For semi- structured thematic interviews, thematic areas are pre- defined, but their order and extent vary according to the interviewees (Aaltola, J. & Valli, R. 2007, 25). There were three clear themes: the past, present and future. But interviews became more semi- structured interviews than thematic because of variety in the interviewee's answers. There are no answer options; the interviewee answers the interviews in his own words. The interviewer knew the subject and type of the questions, but the interviews vary depending on the interviewee, when it is closer to a conversation than a formal interview. This also reduces tension in an interview situation and helps the interviewee to relax. The interview questions are shown in appendix 6.

The interviewees can be divided into two groups: the purposefully selected and the ones who came along coincidentally. The purposefully selected were of course my commissioner, Erbil International Airport, Rotana hotel and two entrepreneurs. The other three were selected on the spot in Erbil.

These three I found after I could not contact a couple companies I originally planned to interview first. The interviews were conducted during March and April 2015 in the city of Erbil.

4.2 Case of Erbil

Erbil the capital city of the Kurdistan region in Iraq was selected to be the case in this thesis because of the huge development of the city that I have witnessed with my own eyes during the last five years. Also Erbil was selected as a Capital of tourism in the Middle East for 2014 and the influential National Geographic publication classified Erbil 21- best tourist destinations “Best trips in 2014” (Visit Erbil 2014) (National Geographic 2014). These nominations started my interest in Erbil’s tourism situation.

First, it is useful to write about the Kurdistan before going to Erbil and explain what this region is all about.



Figure 6. Map of Kurdistan, Erbil's municipality in pink in the middle of the map. (Kurdistan Tour guide 2015)

Iraq is one of the earliest civilizations as well as the birthplace of western culture. At the beginning of the 1900's the country was inhabited by a majority of the kurds in the north, who are Sunni Muslims and in the central and south parts by Shiite Muslims. From then on, the Kurds have worked to break away from Iraq. In 1979, a man named Saddam Hussein rose to the leadership of the Iraqi citizen department. Kurds were opposed to the new government and Saddam decided to violently suppress the protesters. Part of northern Iraq was declared a prohibited area and the Kurds who remained there were systematically removed. A large part of the young men were executed. By 1988, an estimated 4000 villages and large nature areas were destroyed, 180 000 people were killed and 1.5 million banned. It was only when the United States intervened and captured Saddam Hussein in 2003, inter alia, on charges of war crimes and crimes against humanity, that Kurds were able to start a new life while the war between the United States and rest of the Iraq continued (Kurdistan Tour Guide. 2015, 38–41). During the Iraq war 2003- 2010 the Kurdistan region in North Iraq was always known as a peaceful area and American soldiers were able to take a vacation from the war in Kurdistan. Soldiers did appreciate the hospitality of Kurds and were known to move around for example without weapons. The soldiers were also using a lot of restaurant and accommodation services. The American soldiers even today return to Kurdistan with their families to show them where they have been. (Travel company entrepreneur 2015.)

During the war the region remained very calm and the region's administration was working effectively. As a result, Kurdistan has become an attractive area for foreign investors. Also construction of new housing is strong and the political stability of the area attracts the wealthy Arab population to move into the area. (Kurdistan Tour Guide 2015, 48.)

4.3 Gathering data in Kurdistan

Before travelling to Erbil I decided whom I wanted to interview and I knew immediately who they were. They were persons from my commissioning party and then other leaders from the tourism business in the region: Erbil International Airport and the first five star hotel. Also for me it was important to interview local tourism entrepreneurs. Interviews were set with one tourism entrepreneur who I knew already and the owner of one of the largest local newspapers. Agreed interviews were set through e-mails, but precise time and places were confirmed in Erbil.

I travelled to Erbil on tenth of March 2015 and I was going to spend one month in Kurdistan. My plan was to have one interview per day and have two to three interviews per week. But because of the interviewees schedules none of this happened. I had one interview during the first week, five on the third week and one on the last week. Two of the interviewees did not have all the information I needed, so they got back to me and answered via e-mail.

Different from the Finnish way, the interviews were set usually a day or even a couple hours before, one interview was even held by chance. In Erbil my local friend made the phone calls to set the interviews and always told who I was and what for I was using the interviews for. Usually the information went through many persons before it reached the interviewee, so many times I explained to the interviewee who I was and what exact I was doing there.

On the day after my arrival in Erbil I met my commissioner and I had my first interview. Another interview from my commissioner was done by e-mail, which answers I received when I was back in Finland. During my first interview with my commissioner, I learned several things. Smalltalk about my history in Kurdistan was an important icebreaker before starting the interview. Many times the interview started itself due to the smalltalk when the interview became more like a conversation. It was important to notify the interviewee when I started to record our conversation. Before starting

the interview it was really important to check how much time the interviewee had for the interview. Each interview lasted from 20 to 60 minutes depending on the length of the answers and time schedule of the interviewees. If the interviewee did not have enough time I had marked the most important questions, which I went through first. After that I asked the rest of the questions, if we still had time.

I had a checklist for remembering to ask all the information before the interview. Each I asked three questions related to the interviewee's anonymity; if I was allowed record the conversation? Was I allowed to use the name of the interviewee? And was I allowed to use the name of the company? My interviewees gave permission to every point. I also wanted to finish the interview with more relaxed question; usually the atmosphere of the interview was quite dark due to the ongoing war while we were talking about future of Kurdistan. The last question was a bit more personal when I asked about the interviewee's dream for Erbil and Kurdistan. This was the point when the interviewee at latest got a smile on his face. And all of the interviewees had the same answer to this question.

The interviews were held in English and Kurdish, one of them in Finnish. When the interview was in Kurdish, due to my inadequate Kurdish language, there was always a person translating who always came with the interviewee. When I set my interviews I always checked the language of the interview and the possibility to have a translator. Just in case, I always had my local friend with me if there was no translator.

There were plenty of companies who sold plane tickets but only a few who sold tours or tourist activities. I tried to contact the two largest such companies in the region, without answer. Instead I had a chance to interview the manager of the most famous sight, Citadel, owner and founder of the Kurdish textile museum in Citadel and a famous Kurdish fashion designer.

Most of the interviews were done at the interviewee's workplaces and a couple of interviews were held in a comfortable lobby bar of a hotel.

Lobbybar was very clear option for interviews because it was known as a meeting point in the center of town. Sometimes during the transcription I noticed that loud talking on the background hampered the transcription

I always took care that I transcribed my recordings right after the interviews, when everything was still fresh in my mind. When I transcribed my first interviews I transcribed the whole conversation. After a few transcriptions I started to transcribe longer interviews and I understood that it would take too much time to write everything down. Fortunately I understood this when I started to transcribe my longest interviews and I only wrote down the most important points of the conversation. The other interviews I transcribed before made me understand what kind of information is the most important to find.

My goal for the interviews was to get information about the tourism situation in Erbil. I got facts, like numbers of the companies, which cooperated with KRG (Kurdistan Regional Government) and other interviewees like entrepreneurs also shared some facts but also were more emotional with their answers. I had a bit different questions for the ministry, the airport and for the entrepreneurs. From the ministry, which was my commissioner, I needed facts for example: How they organize tourism development and marketing? Is there cooperation? What are the strategies? And so on. From the airport I needed facts also: How many visitors? From where are the visitors coming? I had the same framework of the questions for everyone but I needed to modify the questions to fit the interviewees to get the needed information. The questions depended on the interviewee. Sometimes I followed the framework and sometimes I forgot some questions to get more details about a specific theme. In addition to the facts, I was also interested to hear ideas, plans and dreams of the interviewees to make it more personal.

4.4 Analysis

Analysing the answers was probably the hardest part of the work. Analysing the answers required examination of the contents of the

answers, which required concentration to find the needed information. When I started this part of the work my working stopped. Dealing with nine long interviews became difficult. Finally I put all the interviews next to each other and I started to find similarities and important points from the answers. First I started to use colour codes where I used different colours to combine the same answers. But this technic didn't work for me. I needed to see all the answers next to each other and see which ones recurred most. I only used the colour code to point out the most valuable information.

I divided the content by themes and combined all the nine answers from the interviewees theme by theme, appendix 7. "The biggest factors/ strengths" illustrates that what have been the biggest factors in the past and today, because the answers for both are the same. "Biggest factors needed for development," tells those factors which are needed for the future. Also "weaknesses" shows the factors, which should be improved. I separate the answers from the questions to find the most important information that the interviewee wanted to share. With the gate tally I calculate the number of every answer to see which ones repeated most. These answers I assumed to be the most important. In my opinion, every answer was just as important as the other but I needed to give more attention to the answers of the ministry, Rotana Hotel and the airport because their answers were based on facts.

5 RESULTS

In this chapter I introduce all the ten interviews I conducted. To find out the main questions; how tourism destination is developed and which are the main factors for the development in a future? I built the results in the same framework as I did with the questions:

- past
- present
- future

To understand which factors have contributed to the situation where Erbil is today and where it is going, it is important to work with these themes. After analyzing the data I will reflect the case of Erbil to the theory.

5.1 Past

Three reasons, which were more remarkable why visitors started to travel to Erbil in the first place, were:

- oil and gas
- nature & safety
- archeology & history

All of the interviewees agreed about how Erbil started to develop in the first place. Significant quantities of oil and gas in Kurdistan attracted business to the capital city Erbil. Due to the new big amount of international people in the region new accommodation and other services were needed. Due to the safety and stability of the region, Kurdistan has always been known as a peaceful resort within the rest of Iraq and other Arab countries. This plus the beautiful rare nature with mountains, snow and lakes have always attracted people from neighboring countries for a vacation. Lolan Sipan, owner and founder of the Kurdish textile museum, also reminds us of the archeologists and orientalist who came to the area already at the beginning of the 20th century and maybe before. They were

mostly from the UK and were already aware of the rich archaeological potential in an area.

Local travel company entrepreneur, Rekar Argoshy, remembers the time when the international oil companies started to arrive in the city, and the government started to build new roads and clean the streets. Local rich people noticed the boom in foreigners coming to the city and started to do business for example by opening local companies. The establishment of one's own company has been made easy and without taxes it is really attractive to do business in the region. Neighbouring countries with high taxes more likely prefer to start a business in Kurdistan. During the big "boom" the government started to market Erbil as a new booming oil city through the media in Arab countries. Also big events and concerts were held in Erbil, which were also advertised in neighbouring countries.

The Board mentions three major factors, which have affected most of the growth of tourism and factors that tourism industry is dependent on:

1. Safety and security in the region
2. A good budget provided by Kurdistan Regional Government (KRG)
3. A successful strategic tourism master plan

The liberation of Iraq in 2003 started to grow business, which led to a growing economy. Due to this, The Kurdistan Regional Government (KRG) decided to transform Erbil's former military base into a modern civil aviation airport and Erbil International airport officially opened in 2005.

After 2007 the number of tourist increased, because the time of Saddam Hussein had ended. The government was changed and Kurdistan started to develop their region. Dara Al- Yaqobi, manager of the Citadel, tells that also UNESCO came to the city of Erbil in 2007 and they added Citadel to their heritage list, which was the first UNESCO's sight in Kurdistan. When UNESCO was involved, Citadel became more impressive and it raised awareness of Erbil again. Also UNESCO offers invaluable international assistance to renovate the old city, which has been needed in the region. Citadel is one of the most important key elements in Erbil because it is the oldest continually inhabited city in the

world and that makes Erbil a very impressive destination. Also the old parts of Erbil are all situated next to the Citadel so they are really easy for the tourists to find.

In 2010 the new airport was opened because of the volume of the passengers and to develop the transport and cargo, appendix 8. When the new EIA (Erbil International Airport) opened it enabled the growth of tourism, accessibility got better and the number of visitors increased. The new airport helped to receive a large number of visitors and direct flights for example from Stockholm. Two months after the opening also the author travelled to Kurdistan for the first time.

Also an important notice was that when the new airport was opened it also enabled locals to travel more, which helped the locals to adapt to the tourism business. When the locals travel, they see how the tourism business works in other countries and it makes them understand that they can also make a profit from tourism in Kurdistan.

“Local people have started to travel to destinations like Turkey and Lebanon, and they have seen what tourism does in these destinations so when they come back they want to make a difference also in here.”- Local newspaper entrepreneur

The Rotana Hotel chain noticed the new booming city and started cooperation with Lebanese based Malia Company, which already, with many other Lebanese companies, was increasing their business in the region. Rotana was the first five star hotel in the region and right after the opening other international companies for example Divan appendix 9, Grand Swiss appendix 10, Sheraton and others started to show their interest in Erbil.

Kurdistan's prime minister announced that Erbil will be the next Dubai, because there is no difference between these two cities.

Local travel company entrepreneur, Rekar Argoshy, explained how tourism was growing in 2012 when he opened his tourism company. When the new airport was opened the demand for flights started to grow little by

little. Locals didn't know how to book flights and travels so they needed this kind of service. Also there is no credit card service in Kurdistan so it made the travel booking very difficult. Erbil grew, new businesses came, airports were opened across Kurdistan and suddenly the demand for travel grew exponentially. The economy grew and people had more money to travel than ever. A travel company was a good business and the number of this kind of companies grew greatly.

“Tourism grew exponentially. Flights were full, hotel's occupancy was 100%, and people came to Kurdistan from all around the world. Major festivals and celebrations (such as Newroz), brought millions of visitors. Accommodations were so full that people were sleeping outdoors. But then ISIS came.”- Local travel company entrepreneur

5.2 Present

When Erbil was chosen as a Tourism Capital of Middle East 2014 by the Arab Tourism Committee, the government created a huge event to promote the award widely. And it was deserved but many facilities are still missing and there is much to do before Erbil can reach international tourism. Tourism is planned to be its biggest industry right after oil, or even bigger. Kurdistan's General Board of Tourism supports tourism education and they say that there are already existing three tourism institutions, which will be improved. There are also training centers for those who are working in the tourism sector to improve their skills. These trainings are for private and public sectors. Kurdistan's regional government gave three million dollars for tourism marketing in 2013.

The main attraction, the Citadel in Erbil is now only open partially because it is under renovation and is not save enough for visitors. In this moment the Citadel arranges special visits with their staff but they won't be still allowed to enter buildings. This situation is understandable but is also harmful for the textile museum, which is inside of the Citadel. The museum will be empty as long as the visitors can't enter to area of the Citadel.

Infrastructure became the main weakness with facilities in the answers. Still infrastructure is getting better and construction is shown the most in Erbil's cityscape appendix 11. Interviewees say that at least the infrastructure is better than in the rest of Iraq. One of the general concerns in the answers was specifically the new construction.

“People come to Kurdistan and Erbil because of its history and the culture. They come to look for the Middle East culture so it's a pity that a lot of the old is destroyed. The old need to be saved, the old is the heart and reason why tourists would come to Erbil. Western people have seen the modern infrastructure and when they come to the Middle East they want to see the Middle East.”- Local designer

However in the same breath she says:

“Erbil needs the development, it needs the infrastructure and hotels and so on, for the development. When the economy grows that means that there can be tourism.”- Local designer

I assume that this matter is also taken into account. When the old bazar next to the Citadel was renovated it actually was made to appear old again appendix 12. Also the buildings in the Citadel are made to appear in a way the buildings were built in the first place (Manager of the Citadel 2015). Appendix 13 is a building in the Citadel in 2010 and appendix 14 is the same building in 2013.

Lolan Sipan, the founder and owner of the Kurdish textile museum believes in deeper reasons:

“Kurds are going through an identity crisis now, trying to forget the past. They are trying to westernize and modernize as soon as possible. This is the problem; you can see this in new infrastructure. Modern is welcome but we have to preserve our culture and heritage.”- Owner of the museum

“Kurdistan has so much more than other Middle Eastern countries but for example, in Dubai, they have succeeded in organizing tourism. They know how to build the new and preserve the old. In here we have such beautiful sights and Dubai started from nothing.”- Owner of the museum

The government has supported the tourism sector from the beginning. When the big hotel chains came to Erbil the government supported them. They gave a good spot for the hotel and helped in the building. Also the government supports and makes it really easy to open a tourism company. The local travel company entrepreneur reports that after he opened his business, similar companies were opened across the city next to each other. Kurdistan’s General Board of Tourism made a new law for this kind of companies because there started to be plenty of them. If a tourism company wanted to renew their license they had to implement the new law. If a company was having plenty of tourist groups for example from South Iraq the company needed to have the same amount tourists also from outside of the country. This would have increased the number of international tourists in Kurdistan. But after an extremist Islamist rebel group called Islamic State of Iraq and the Levant (ISIL or known better as ISIS) attacked this law was put on hold.

EIA (Erbil International Airport) shows statistics of the visitors in the region. Most of the passengers come from the Arab countries for example Lebanon, Jordan Egypt and the Emirates. The biggest amount of visitors come from the rest of Iraq but there is no numbers for people moving inside of the country. There are also visitors from Germany, Sweden, Holland, Belgium, Iran, Indonesia and Bangladesh. In general these from this visitors come to work in Erbil and not as as tourists.

The number of tourists has grown 30% yearly. The Erbil International Airport statistics show soaring growth in the number of visitors during the last seven years.

Table 1. Number of visitors in Erbil from 2007 to 2013. (Erbil International

Airport 2015.)

In 2007	153 571
In 2008	211 780
In 2009	426 398
In 2010	675 479
In 2011	1 165 174
In 2012	1 518 830
In 2013	2 029 623

An extremist Islamist rebel group called ISIS attacked Iraq and Kurdistan right after the Erbil's nomination.

When ISIS came, it changed everything. The board explains that all the money has gone to the war because a safety and security come first. And of course no one wants to travel to a war zone. Because of the war the government cut their budget, which is understandable but a huge problem. In 2013 there was a tourism loan for the entrepreneurs who wanted to work in the tourism sector, for example opening a hotel, tour office and so on. But in 2014 there was no loan because of cutting the budget. Also the number of refugees in an area right now is a problem because some of the refugees are living in hotels and motels. One of the governments biggest problems now is that how they can help refugees. The war and the refugees are now the main issues for the government, not the tourism. The war also affects the movement of people. Most of the visitors in Kurdistan are from the rest of Iraq and this is where the war exists. ISIS has also cut off the main roads for example the road from Bagdad to Erbil.

Sometimes even the airport needs to be closed because it is used for military vehicles.

For now, construction has stopped and more than 200 hotels are closed and tourist companies are also closing their doors:

“We needed to close our company. A company that used to be one of the best businesses was closed because we didn’t make any profit for months.”- Travel company entrepreneur

5.3 Future

Every interviewee agrees that without ISIS, Erbil would have been the next Dubai for now.

Kurdistan’s General Board of Tourism is very committed to developing and expanding the tourism sector in spite of the situation. One of the master plan’s biggest strategy is for Kurdistan to be as big tourism destination as other international destinations are by 2025. The Board knows that people don’t know Kurdistan and making Kurdistan known internationally is a big part of the Master plan.

In 2013 Kurdistan had 3 million tourists and the board wants to increase this number to 7 million by 2025. They also tell that giving support to the private sector and developing the skills of those who are working in the tourism sector are important goals. The Board has also started to improve the tourism service to make it better and improve marketing and advertising internationally. They want to introduce Kurdistan to the rest of the world through their brand and slogan: Kurdistan, land of history and nature. The board knows that education of the employees in the tourism sector is the key to making the service better and professional.

“Kurdistan needs to improve their instructions, tourism environment and tourism education in every level from colleagues to institutions. For every of this mentioned, has own manager and yearly plan. As a sample, tourism education,

there will be three new tourism schools opened and tourism departments in different colleges.”- Kurdistan’s General Board of Tourism

The manager of the Citadel tells that restored the Citadel is ready for new life and for new uses these new uses will be for cultural and touristic uses. So for this the Citadel needs to be renovated so it can have a new life. For this, the Citadel has a short-term plan and a long-term plan for the next 25 years.

“Our vision for the Citadel is to have a cultural and touristic sight, where tourists, people, residents of Erbil and Kurdistan can spend nice time in a historical cultural area.” – Manager of Citadel

One main factor needed for development was international recognition and help.

“Factors needed for development would be international companies. Not international companies to come here to work. We need international companies to come here to teach us. We don’t need anything from outside but we need to be trained because we are so young. We just got our international airport and we don’t even have our own country yet! We are still so new with all this so people need to be trained and educated for tourism. If people can get jobs in tourism and we use our people, the money will stay here and it won’t go to the international companies. And this is really important, especially for people to understand that they can make a profit out of this.”- Local designer

“European companies need to come to Kurdistan. In particular the tourism companies who could give their advice to the ministries and government to develop our tourism. If we can get help from outside, Kurdistan’s tourism would grow. Tourism could get so big that it would be the number one

resource in Kurdistan and the second would be the oil. When people think about Kurdistan they would automatically think about it from the tourism point of view.”- Owner of the local newspaper

The main problem and weakness emerged clearly. Every interviewee mentioned the lack of independence as the most important problem.

“The main problem is that people think of Kurdistan as a part of Iraq. All they see is war and explosions; they don’t see that Kurdistan is different destination from the rest of Iraq. Culture, language, everything is different. And safety and security is in its on class. “ – Kurdistan’s General Board of Tourism

The board would love to say that Kurdistan is it’s own country but people will always think of Iraq as one country as long as it is that way. For example even getting a visa to Iraq is hard so separation from Iraq would improve tourism in many ways.

The current situation has affected every single business and company in the region but the board and companies are fighting back:

“We are trying to keep our occupancy at high levels during this time by having special offers and outlets. Hopefully the coming exhibitions will bring people back.”- Rotana Hotel

“Big hotels make more hotels.”- Rotana Hotel. After a big boom of highclass hotels in the region, more international hotels are interested in starting their business. For now Hilton appendix 15 and Sheraton have started to build their first hotels in Erbil.

If there is need to find something good about the current situation, it is that Kurdistan has been noticed in media internationally. Kurdistan has been shown as a country, which has kept its borders closed from ISIS.

All the interviewees do believe in a bright future, they say that Kurds have always fought for their existence and even now they wont give up.

“Eventhough the situation has been bad, Erbil continues to live and grow and no matter what, it always rises again.”- Owner of the local newspaper

“Before ISIS, we were ready. We were ready for international tourism and ISIS is not only our problem, but is a problem in the whole Middle East. If I called you right now to come, you would, because you know you will be safe here but someone else who has never been here would not. That is why we need ambassadors like you to tell rest of the people how beautiful is here.”- Local designer

“We truly believe that Kurdistan has opportunity to be internationally known because the region has all it needs.”- Kurdistan’s General Board of Tourism

“Kurdistan is ready. Kurdistan has great potential for future tourism. People are ready, they are very hospitable. Kurdistan needs tourism. We don’t know if mass tourism is what we want but kind of a niche tourism.”- Owner of the museum

“There will be a good future for Kurdistan, better than before, but it takes time. This war has nothing to do with Kurds but it was brought here.”- Local travel company entrepreneur

5.4 Reflection on theory

It is important that when the tourism grows in Erbil the development will grow correctly. External help is needed but it should be built in a way that the region will benefit from the development.

“If people can get jobs due to tourism and we use our people the money will stay here and it won’t go to the international companies. And this is really important, especially for people to understand that they can make a profit out of this.”- Local designer

Erbil definitely has a unique geography, history and cultural traditions and Erbil has been marketed from these points of view. The Government has succeeded in destination planning so far but the destination is very young and they need to continue with their work. The community and the residents of Erbil must be taken account when planning its tourism. The government needs to take care that the local community accepts the possible changes.

Godfrey & Clarke (2000) say that every destination also needs to have a long-term tourism plan, which is a shared strategy for all stakeholders to follow for the future. A tourism plan or a tourism master plan is a long-term plan for 10 years or more (Godfrey & Clarke 2000). Kurdistan's General Board of Tourism has commissioned international consultants in this endeavor to produce a strategic tourism master plan that will guide the development of the tourism till 2025. One of the main strategies of the master plan is for Kurdistan to be as big a tourism destination as other international destinations are by 2025. (Kurdistan's General Board of Tourism 2015.)

Godfrey & Clarke (2000) also remind us about working for the identity of the destination and not focus on similarities with other destinations but on differences (Godfrey & Clarke 2000). Erbil is getting its inspiration from Dubai, because they are quite similar with their rapid development and they have similar resources. Having inspiration from Dubai helps with the destination planning in Erbil and preference for Erbil the city has much more natural resources than Dubai had. Kurdistan's General Board of Tourism has started to market Kurdistan with a brand: Kurdistan land of history and nature appendix 16. With a brand, a destination is exported to the world.

Prideaux (2009) put together the main destination criteria and if one of them is missing or cannot be supported, we can expect that growth will stop or it will require significant efforts by the authors. There were four themes for the criterias:

- internal factors
- marketing
- support
- external factors (Prideaux 2009.)

When we look at the internal factors in Erbil we can note that there are plenty of tourist attractions. There are more built attractions inside of the city and more natural attractions outside. But also Erbil has plenty of natural and archaeological sites. Other major attractions in Kurdistan, which are the world's oldest archaeological sites, are in the immediate vicinity of Erbil. The lands carrying capacity is good; there is open plan space, which means that land is available for development. Nature is diverse and water can be found from numerous rivers, which flow from the mountains and are born from natural water springs. However, Erbil is placed in dry land area so economical use of water is desirable. Also one weakness in the answers of the interviews was garbage. Also the author has noticed this as a problem in the region. Garbage handling is one major problem that the government needs to work on. There is availability of different resources and the region is very attractive for new investments. Also the location of Erbil is in the middle of the Middle East region and close to other big cities.

Kurdistan's General Board of Tourism is responsible for the marketing and they said that there is a project for marketing and media in the amount of 3 million dollars. The project is now in process and it includes 77 activities.

Kurdistan's General Board of Tourism supports private sectors. Also the residents of Erbil are ready for tourism.

“Residents of Erbil are ready for international tourism. Hospitality is the biggest strength that Kurdish people have because they love people and they adapt easily and really quickly to the changing environment. Kurdistan is living in a time of change and people are ready, and will adapt to these new changes.”- Local designer

Government supports the tourism sector and cooperates with for example the tourism ministry and Erbil's international airport. The government supports tourism with its yearly budget, which is cut by half this year because of the war situation.

"The prime minister has listened to me of my ideas for developing tourism in the region"- Owner of the local newspaper

Even though the government supports infrastructure, infrastructure became the main weakness in the answers in the interviews. There is a lack of especially in transportation infrastructure.

In external factors, international economies can have an effect because Kurdistan's economy is built on oil. The national economy has been stable compared to its neighbouring countries but is easily affected for example by the currently on-going war. There are no major climate changes in Kurdistan. Small earthquakes have been found but those have not affected tourism. Drought can be a problem in the future because it is known in the Middle East region (The World Bank 2014). Wars in neighbouring countries do affect and independence from Iraq would help to solve this problem.

Erbil has all the main destination criteria by Prideaux but it has some deficiencies, which the government should focus on.

When we compare the development of Erbil to the Butler's model we start to measure the development from 2007 to 2014. In 2007 time of Saddam Hussein ended, government changed and as a result Kurdistan started to develop their region. For now, we haven't received numbers from 2015. (Kurdistan's General Board of Tourism 2015)

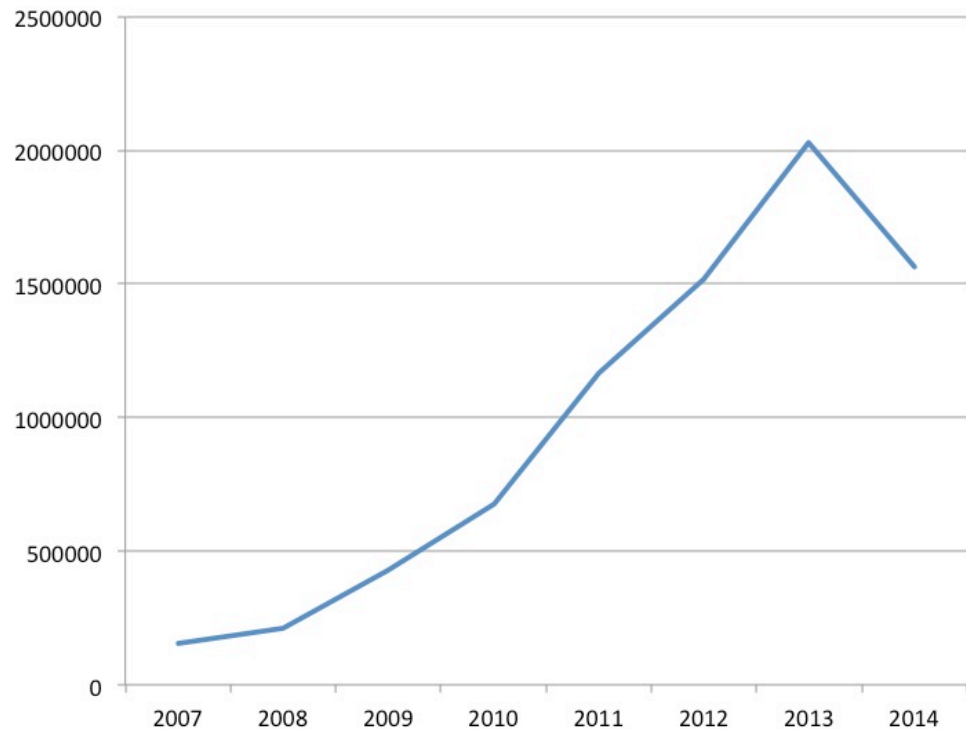


Figure 7. Tourism lifecycle of Erbil.

Numbers on the left side of the figure describe Erbil's visitor numbers and under the figure are the years when the development has happened. We can see a small change in the curve in 2010 because of opening of the new international airport. Due to this, the development started to grow faster. In 2013, year's 2014 visitor number was forecasted to be at least three million (Kurdistan's General Board of Tourism 2015). In 2014, the development started a good growth due to the nomination "tourism capital of Middle East for 2014" but after ISIS attacked in the summer 2014 the growth of visitor numbers collapsed.

From the figure, we can see how the growing curve suffers an immediate decline. A sharp decline right after the fast growth is unusual and usually a crisis, for example, a war or a cataclysm causes a corresponding problem. Usually after a crisis development has a chance to start to grow again. In case of a cataclysm, the new start depends on the magnitude of the damage. In case of a war it also depends on the magnitude of the damage but also the length of the war. The impact of crisis on the tourism industry depends on a range of factors including the scale of the event; it's cost,

and funding for recovery, the ability of victims to recover and the length of the recovery/-rebuilding phase (Prideaux 2009, 116). In the case of Erbil, there has been no damage from the war yet so the development should improve quite fast. Butler (1980) explained that due to decline people may lose their jobs related to tourism and the image of the destination will suffer (Butler 2006, 5). More than 200 hotels in Erbil have closed for now and Kurdistan has been seen in a media because of the war. This may affect the image of Kurdistan later.

6 CONCLUSION

My research questions in this study were:

- How has Erbil developed into a tourism destination?
- Which kinds of factors are needed for the development in a future?

The aim also was to evaluate the potential of Erbil to become a known tourism destination.

When a destination wants to develop it needs to have a base for developing. A destination needs tourist attractions, built or natural but usually both of them. To succeed, the attraction should be different from its competitors. Destination should focus on its identity and unique factors. In the case of Erbil, in addition to the several attractions, the region has plenty of natural resources, which are in this case oil and gas, which affect economic growth. The economy has a positive impact on tourism.

Then governments and local authorities support is needed. A budget for infrastructure for example accommodations and services, and marketing for tourism is needed. To assist marketing, it is desirable to create a brand for the destination.

In Erbil the government supported tourism sector for example with a big budget and marketing. Erbil had plenty of accommodation options and infrastructure was started due to increasing business in the city. But if Erbil wants to pursue other forms of tourism, government needs to focus on the services, which have now been forgotten because the focus has been in the support and marketing. When Erbil was chosen to be the capital of tourism in the Middle East in 2014 the government started to promote this widely. These actions were deserved due to amazing archeological sites and the booming city of Erbil; but Erbil is still missing facilities.

Myself, I have been in Erbil as a tourist also and the following comments are born from my own observations in Erbil.

Erbil's new international airport is an important door to the rest of the world and also an important door to Kurdistan. The airport has an important role for the visitors arriving in Erbil, because this is the first impression they get of Erbil. When the visitor wants to continue his trip from the airport there is no tourist information desk or maps and guides to help the visitor. When the visitor leaves the airport the only option is to have a local taxi to reach his destination. If the visitor is not able to speak the local language the communication can be difficult depending on the linguistic skills of the driver. The name and the address of a visitor's destination should be written to help the communication but even then the bilateral understanding is not assured. In the accommodation the linguistic skills of the staff are not assured either. When the visitors want to move and visit attractions, the only possibility is to use the services of the local taxi again. The staff of his accommodation may help to order the taxi and inform the driver of the destination or the visitor need to cope on his own again. Information in the centre is also in English, which helps moving. Some of the attractions do have new information boards appendix 17, old boards appendix 18 or some of them don't have any appendix 19. For example the appendix 19 is from Xns caves where native people have lived and there is not any kind of information about these mystery caves. Restaurants and other leisure- time services can be also difficult for a foreign visitor to achieve.

The government has succeeded in the marketing of Erbil but before international marketing and the possibility to have international tourists, the government needs to work on services, transportation, education and information. At this point there is no demand for professional tours and guides but if these existed maybe the demand could rise?

Also the support of local residents is important and for the community to understand that they can also make a profit from tourism sector and it can become an important resource for the region.

When the marketing and right distribution channels, local support and services have been implemented, the destination can start to develop in international markets.

Erbil has succeeded in all sides of developing tourism and in spite of the current situation the author and all the interviewees do believe in new growth in development and possibilities for Erbil to become an international tourism destination. Rekar Argoshy, the local travel company entrepreneur, has kept me updated on the situation of Erbil. Im pleased to hear that international hotel chains like Hilton and Sheraton have continued the building and other international chains have shown their interest in Erbil. Also step-by-step, hotels and other tourism companies have carefully started to open their doors again. I am also happy to receive the Kurdistan's first tour guide 2015- 2016 by Kurdistan Iraq tours, which is a pleasant surprise during this dark period.

6.1 Recommendations

Recommendations are directed at my commissioner, Kurdistan's General Board of Tourism. As can be seen from the recent chapter, there are still some deficiencies to Erbil to develop to be an international destination.

The interviews brought to the surface twelve weaknesses:

- cooperation
- the skills of the tourism employees
- stability
- local's knowledge
- goverment's support
- transportation
- garbage
- infrastructure
- facilities/services (information etc.)
- hospitality
- Kurdistan as part of Iraq

The main weaknesses, which recurred most, are the ones where my commissioner should focus on. The main weaknesses were the skills of tourism employees, infrastructure and facilities and services. Skills of the tourism employees refer to the number of the people working in the tourism sector for example as guides. The existing employee's skills also need to be improved with knowledge of the sights and with linguistic skills. More education on tourism sector would be answer to solve this problem. Together infrastructure and facilities mean more tourism services for example: different forms of accomonditions, tourist information/guides/ tours and so on. Infrastructure means also the highways, especially the roads that lead to the sights and old conservation and its renewal.

There was also one weakness that I noticed myself on a daily basis and that was the garbage. Rekar Argoshy, from Ice Tours, told me that they have never been taught that they should not litter because the wars have followed the Kurds throughout their history and they have never thought about littering. Lolan Sipan the owner of the Kurdish textile museum sees the problem in a growing city. He says that people knew how to recycle when they were living in the villages but now in the cities people have a new kind of garbage and don't know what to do about it.

“The city is just growing without a plan or vision. Kurdish people are destroying their own nature.”- Owner of the museum

I hope that the government will focus on this problem at some point, because for a foreigner it is really disturbing.

6.2 Research evaluation

Even though the interviewees weren't implemented as planned, I was very pleased with my final interviewees and the interviews with them. During my trip I met interesting persons, which I interviewed unexpectedly and these interviews became the most remarkable. Fortunately I booked enough time for my trip to Kurdistan, because the schedules had a habit of

changing in several times. Two of the interviews happened via e-mail, because of the lack of all the information needed and these questions were double checked to get the right information. I was very strict about the information I collected to get reliable material. Reliability of the research means that the research is repeatable regardless of researcher. It is also important to present the theory behind the conclusion so it will lead to the same results (Hirsjärvi 2013, 231–233). In the chapter, “reflection on theory”, I explained the life cycle of Erbil’s development and I proved the capability of Erbil to be a tourism destination based on theory.

All my interviewees, except one, were authors, policy makers or entrepreneurs in the tourism sector or supported tourism development with their business. One entrepreneur did not work in the tourism sector, but was a local entrepreneur who also worked with Kurdish history and culture. The professions of my interviewees also ensure reliable data for my work.

I was worried that I would get a lot of similar answers from the interviewees because many of them cooperated with the government and Kurds are known to be very patriotic so I expected only positive perspectives when it comes to their land and that was actually the one reason why I wanted to have different kind of persons for the interviews. I was very pleased with the wide variety of the perspectives of the interviewees but still the same main factors (strengths, weaknesses) did come up from every interviewee. Every interviewee was happy to work with me and everyone was pleased that I had chosen Erbil and Kurdistan as a case for my work.

6.3 Thesis process and self evaluation

I was very passionate about this work and it was close to my heart. Kurdistan is a very special place for me and this was the main reason why I chose Erbil and Kurdistan as a case for my work. The starting point was to tell everyone about Kurdistan, everything else came along during the planning of the work. The nominations that Erbil earned in 2014 confirmed

my thoughts about the subject of the work. Because of my personal relationship with this case, I knew I would have to stay objective and I decided in the first place to keep my emotions out of this work and I wish I had managed to do it.

I started to work on this research in January 2014 and completed it in November 2015. This was my original schedule but I wanted to accomplish it already in spring 2015. I started to work on the framework in January and I travelled to Erbil on tenth of March and I stayed there for a month to collect my interviews. In April I worked on the interviews and I planned to accomplish my work in May or June before the holiday season. Because of my personal life I continued the work in August 2015. Analysis of the results was definitely the hardest part and a part where I needed guidance.

Destination development was a totally new subject for me but it was interesting to work on in connection with Erbil.

The work was pleasant to do because it was topical and in a same time it was challenging because the situation in Kurdistan was changing all the time. The theme was also very interesting to work with and I had high expectations for it. I would have been able to continue to work with this study even further. I wanted the study to be excellent because it was special for me and I wanted to provide useful work for my commissioning party.

6.4 Suggestions for future research

This study is about the development of a destination and focuses on Kurdistan's capital city of Erbil. Erbil was a booming new destination and tourism was developing fast. My purpose was to research the tourism development of the city of Erbil and introduce the booming new destination. Due to the ongoing war in the area, the situation changed really fast and the development has stopped for an unpredictable period of time. My research shows that Erbil has potential to become a tourism

destination but will it be? What happens next will be interesting and will Erbil become an international tourism destination? And if Kurdistan achieves independence, how would it affect tourism? My research generates many questions, and leaves the future open with space for further research.

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APPENDIX 1. Location of Kurdistan region



APPENDIX 2. Material from Kurdistan's General Board of Tourism



APPENDIX 3. International tourist arrivals

Rank	2012 (million)	2013 (million)
1. France	83.0	...
2. United States	66.7	69.8
3. Spain	57.5	60.7
4. China	57.7	55.7
5. Italy	46.4	47.7
6. Turkey	35.7	37.8
7. Germany	30.4	31.5
8. United Kingdom	29.3	31.2
9. Russian Federation	25.7	28.4
10. Thailand	22.4	26.5

APPENDIX 4. Erbil Citadel in 2010



APPENDIX 5. Tourism resource audit

Resource feature	Quality issues	Relative uniqueness	Appeal-drawing power
NATURAL			
CULTURAL			
EVENTS			
ACTIVITIES			
SERVICES			

APPENDIX 6. Structure for Interviews

History and the past of Erbil as a tourism destination

- The purpose of the business? What are the values of the company?
- How the business started in here and why? Why the business was opened in here?
- What was the situation in Erbil on that time? Was there any tourism/ any other tourism business?
- Was Erbil looking for example from other tourism destinations?
- What you think that has been your role of tourism business on that time?
- Were there any struggles? What helped your business and what made it difficult?
- Which companies were the first tourism enterprises in Erbil? Who is responsible for developing tourism in Erbil/ Kurdistan region?
- Which main factors have affected most of the growth of tourism? What kind of factors tourism industry is dependent?

Today- The current situation of Erbil as a tourism destination

- What is the situation right now in the company/ in Erbil/ and in tourism business? Who/ Which factors made this situation possible?
- Is the city/ residents ready for bigger tourism in international point of view?
- What are the biggest factors in the field at the moment?
- What is the role of your business in the field at the moment?
- Is there any cooperation between the tourism companies?

Future

- What you think, what is the situation of tourism in the future?
- What are the potential strengths and weaknesses of the region?
- What kinds of factors are needed for the development? And why?
- What kind of visions or targets you have?
- Who or what will be the biggest factor/s for the future?
- Future plans for your business? Is the company going to expand? Invest more in tourism? New partnerships?
- Your dream for the future?

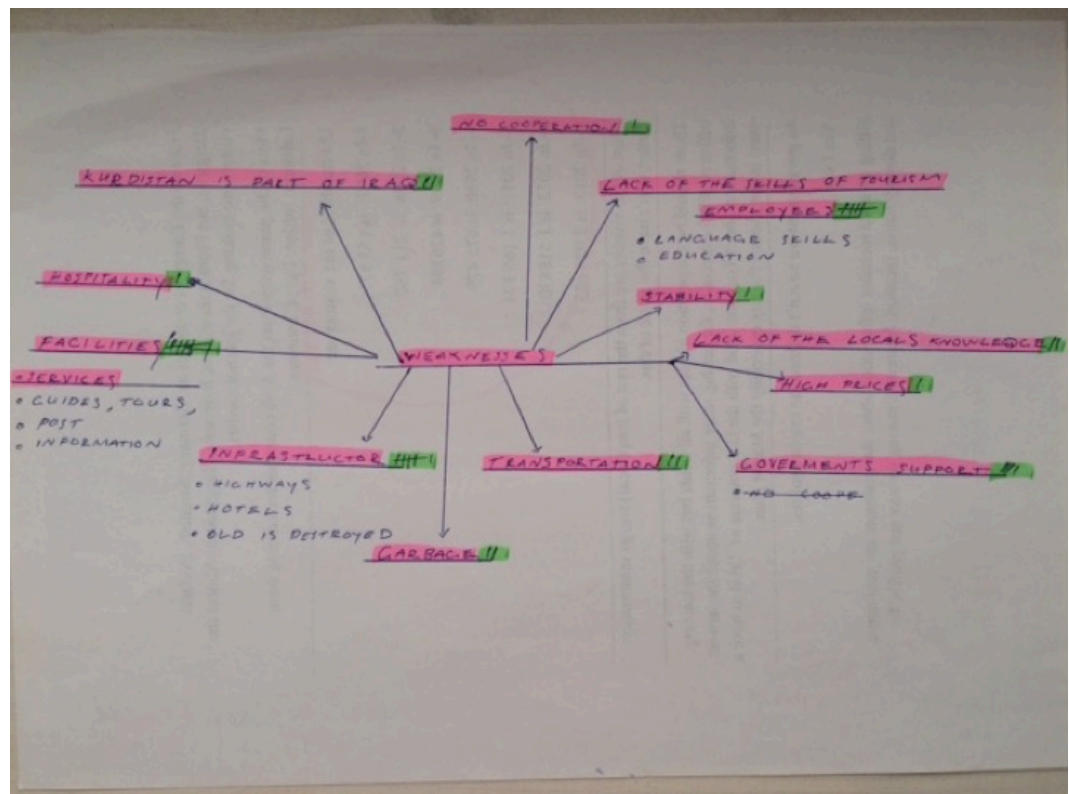
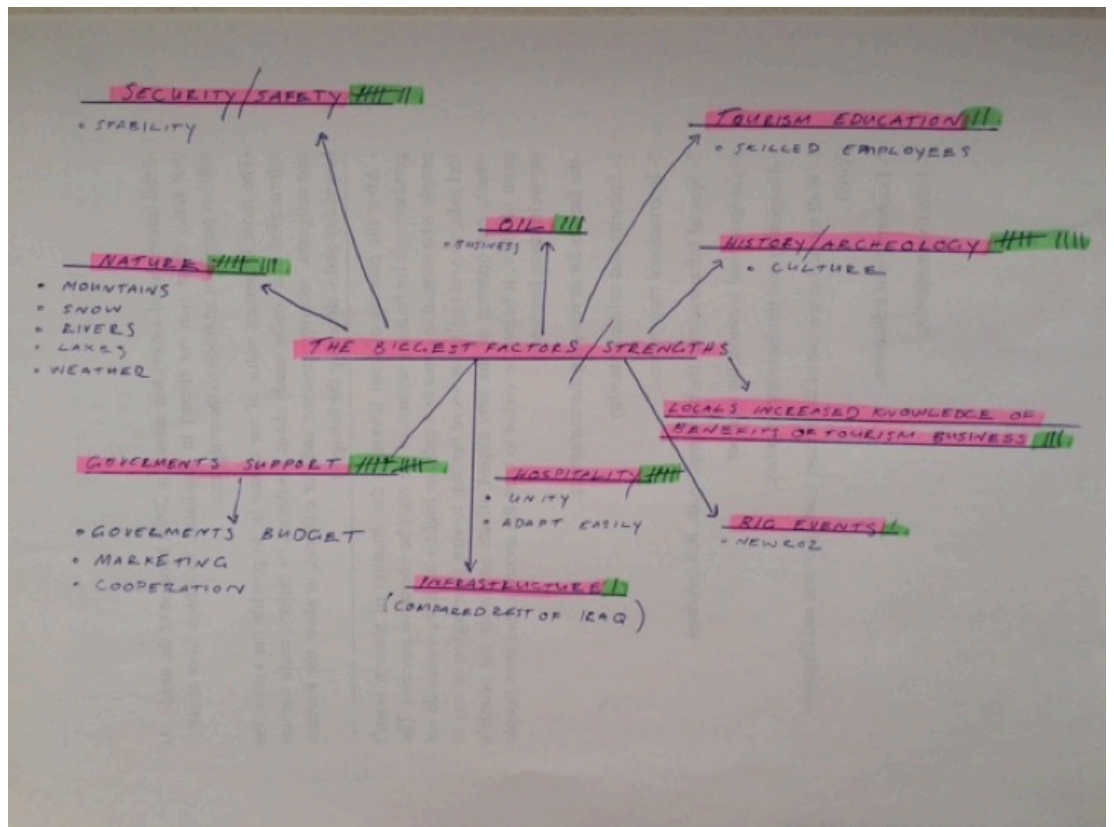
- Is there anything else that comes to your mind?

+ Specific questions for The Kurdistan`s General board of Tourism, Erbil International Airport and Rotana Hotel.

- From which countries you are having visitors?
- What are the most important origins of visitors?
- Have you defined tourist profiles and customer segments for Erbil?
/ Can you describe a profile of a person who would visit Erbil?
- Which would be key themes of Erbil? How would you describe the position of Erbil in a tourism market? In Middle- East? Globally?

- Which are the most important sights in the region? Are there any other existing tourism products and experiences? On what you wish to visitor in Erbil to focus on?
- How have you organized your tourism development?
- How have you organized your tourism marketing? Do you cooperate in marketing?
- How the region is marketing the tourism sights internationally/ locally?
- Have city think about environmental impact of the tourism business?

APPENDIX 7. Analysing the answers of the interviews



APPENDIX 9. Divan Hotel in 2013



APPENDIX 10. Grand Swiss Hotel in 2015



APPENDIX 11. Erbil's cityscape in 2013



APPENDIX 12. Bazar was renovated in 2010 to appear old again. Bazar on the left side of the picture



APPENDIX 13. Building in Citadel in 2010



APPENDIX 14. Same building as in appendix 13 in 2013



APPENDIX 15. Hilton Doubletree hotel under construction in 2015



APPENDIX 16. Tourism slogan for Kurdistan



APPENDIX 17. Old information board in the city of Amedi in 2015



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APPENDIX 20. Prideaux's (2009) key factors in Erbil

Factors in a destination	Erbil
Main tourist attractions -Natural and built attractions	Natural: - Qalinj Agha Hill - Village of Zawi Chemi - Iraq's highest mountain Built: - City of Citadel - Choli Minaret
Carrying capacity and sustainability expressed as land available for development	The land that has been bombed for years before has endured wars and post- construction.

Availability of natural resources to absorb visitor flows without sustaining damage	Diversity of natural resources
Availability of resources such as water, environmental factors and political factors.	<ul style="list-style-type: none"> - Water distribution systems - Plenty of natural water - Environmental factors - Political factors
Availability to attract: -New investments -Have good distances between other destinations and other major generating regions.	<ul style="list-style-type: none"> - Oil, gas and growing city do attract new investments - Erbil is close to two major cities of Iraq and is located middle of the Middle East

Marketing	Erbil
Effective and representative marketing	Kurdistan's General Board of Tourism is responsible of the local and international marketing
Right marketing channels and distribution	Advertising across the whole Middle East by media, social media, guides and travel markets

Support	Erbil
Support given by local authorities and residents	<ul style="list-style-type: none"> - Local authorities support local tourism sector - Residents are ready for tourism

Volume of support given by regional, state and national governments	- Kurdistan Regional Government is supporting tourism sector and cooperates for example with Kurdistan's General Board of tourism and Erbil International Airport
Investment in new transport infrastructure.	Government has invested in new infrastructure and also in airport

External factors	Erbil
Impact of competing destinations	Erbil stands out from its competing destinations
Changes in the national and international economies	<ul style="list-style-type: none"> - International economy may affect, because Erbil's economy is built on oil - National economy has been stable but external factors can affect
Ability to adapt to climate change and to potential threats.	<ul style="list-style-type: none"> - There is no major climate changes - Small earthquakes but don't affect - Wars in Iraq do affect

APPENDIX 21. The interviewees:

- Sadraddin Othman Hamza. Manager of the Kurdistan's General Board of Tourism head office
- Assistant of the Kurdistan's General Board of Tourism head office
- The marketing manager of Rotana Hotel Erbil
- Dara Al- Yaqoobi. Manager of Citadel Erbil. Head of HCECR and Senior advisor- Council of Ministers
- Las Barznji. Owner and founder of Business Magazine Erbil
- Lolan Sipan. Owner and founder of Kurdish textile museum Erbil
- Kawa Aziz. Manager of Erbil International Airport
- Della Murad. Kurdish fashion designer
- Rekar Argoshy. Ice Tours travel company entrepreneur and police

