

CREATIVE INDUSTRIES TOURISM IN QATAR: ECONOMY DIVERSIFICATION THROUGH ARTS AND HERITAGE DEVELOPMENT

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Received 29 March 2017

Revised 26 May 2017

Accepted 7 July 2017

<https://doi.org/10.20867/tosee.04.19>

Abstract

Purpose – The objective of the research is to analyze both policy and practice in creative industry development in the State of Qatar for the purposes of economic diversification.

Methodology – Policy documents of major government stakeholders, the author’s direct professional experience with Qatar Tourist Authority activities, and a literature review including non-peer-reviewed grey literature (newspapers and websites) on creative industry development in Qatar were consulted.

Findings – Heavily reliant on a resource-based export economy (oil and gas), the Qatar Tourism Authority, Qatar Museums Authority, and Qatar Foundation for Science and Community Development as part of the National Vision Strategy 2030 have all embarked on a multi-pronged developmental plan to establish and foster both traditional native creative industries such as calligraphy and handicrafts and intangible heritage activities (desert Bedouin encounters) as well as modern industries such as film, book production and translation, and fine arts. With few internationally recognized tourist attractions outside of the Museum of Islamic Art, Education City, and Souq Waqif, Qatar’s tourism industry has struggled to define its overall vision.

Contribution – This contribution adds to the evidence base of both successful and unsuccessful projects designed by resource-rich developing nations to diversify economic activity through creative arts tourism as a means of servicing both the business and leisure travel sectors.

Keywords Tourism-cultural economics, Qatar Tourism, creative industries, MICE

INTRODUCTION

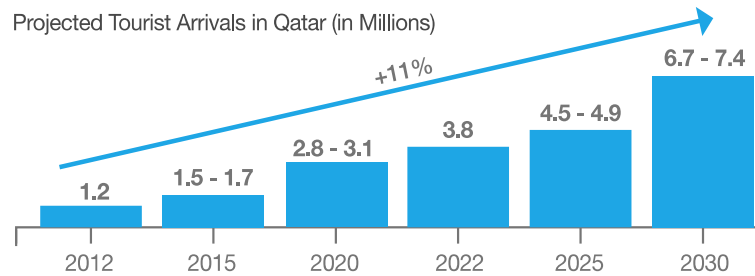
This contribution adds to the evidence base of both successful and unsuccessful projects designed by resource-rich developing nations to diversify economic activity through creative arts tourism as a means of servicing both the business and leisure travel sectors. Most of the Arabic-speaking Gulf nations are now high per-capita-GDP wealthy nations, and travel is a popular activity among Muslims since “travelers are considered to be closer to God and their Doaa (asking God for something) and prayers are more responded to while traveling” (Zamani-Farahani & Eid 2016, p.146). The State of Qatar relies primarily on a resource-based hydrocarbon export economy (oil and gas), and the Qatar Tourism Authority, Qatar Museums Authority, and Qatar Foundation for Science and Community Development as part of the National Vision Strategy 2030 have all embarked on a multi-pronged developmental plan to establish and foster both traditional native creative industries such as calligraphy and handicrafts and intangible heritage activities (Bedouin encounters) as well as modern industries

such as film, book production and translation, and the fine arts. With few internationally recognized tourist attractions outside of the Museum of Islamic Art, Education City, and Souq Waqif, Qatar's tourism industry has struggled to define its overall vision. Many tourism initiatives have not progressed beyond the planning stage. Qatar is also struggling to compete with iconic regional offerings such as the Pyramids of Egypt; the Nabataean ruins of Petra, Jordan; Hajj and Umra pilgrimages to Mecca, Saudi Arabia; coastal resorts along the Red Sea and Mediterranean, and the shopping and travel hub of Dubai. Recently, the Meetings, Incentives, Conferences and Exhibitions (MICE) sector has produced the most revenue as 70% of travel to Qatar in 2015 was business related (*BusinessToday* 2015), primarily in the area of business meetings, international scientific meetings, petroleum industry-related research, development and training, and educational consulting as Qatar builds the regional educational hub of Hamad bin Khalifa University (Education City). Simultaneously, Qatar government agencies have funded the Doha Film Institute, the Firehouse Visiting Artist Program, Qatar Foundation Translation Institute, and Bloomsbury Qatar Publishers to foster native talent in various creative industries and to attract tourists and art collaborators to take part in a growing arts culture which includes five new museums of art and history, and Masters and PhD level programs in museums conservatorship, archaeology, and museums management at the University College London-Qatar campus.

The official body regulating and promoting tourism in Qatar is the Qatar Tourism Authority (QTA). In 2014, the authority issued its Qatar National Tourism Sector Strategy (QNTSS) as a development plan, coordinated with Qatar National Vision 2030, which is the national vision statement guiding all aspects of future planning for the State of Qatar. The accompanying Question and Answer (Q & A) document of the QNTSS states the three primary goals of the national tourism strategy as: 1) diversifying the economy, which is a natural resources export-based economy; 2) bringing exposure to this little-known area of the world, and; 3) preserving local values: "The Qatar National Tourism Sector Strategy 2030 is a long-term strategy that will help advance the tourism industry in Qatar through a series of well-defined plans, programs, projects, and policies that were developed according to international best practices and following a nation-wide consultative process. The Strategy is an integrated effort to ensure the country's sustainable development by reducing its reliance on its hydrocarbon resources, while also placing it on the world tourism map and helping promote and perpetuate its people's culture, values, and traditions" (QTA 2014b, p.4). In 2016, the new Hamad International Airport that was built to aid in economic diversification handled "37.3 million passengers and 245,800 landings and take-offs" (HIA 2017). In January 2017, this airport was awarded "5-Star Airport" status by Skytrax, making it the only airport in the Middle East to win this award.

In 2012, total tourism activity only contributed about 0.8% to Qatar's Gross Domestic Product, with government officials targeting an approximately 3% contribution by 2030. However, the QTA is planning for 7.4 million tourist arrivals by 2030, an increase of more than 1.5-1.7 million more arrivals than in 2015 (see Figure 1 below).

Figure 1: Projected Tourist Arrivals in Qatar (in Millions)



Source: Qatar Tourism Authority, 2016.

Research into Qatar’s tourism sector has been hampered by several factors, and there is currently a lack of systematically collected empirical data on specific programs and initiatives, as Musinguzi points out: “most authors writing on Qatar's tourism industry have paid little attention to methodological aspects such as validity, trustworthiness, data analysis, study limitations, and areas for future research. Qatar tourism research needs to move to the next level of methodological sophistication. Moreover, many important tourism themes have remained marginalized, which may limit our knowledge and understanding of tourism in an oil-dependent country like Qatar” (2016, p.267).

The State of Qatar, however, has an ambitious program mandated by its 2030 strategy, as detailed in Figure 2 below:

Figure 2: Qatar Tourist Authority Progress to Date (2015) in Achieving the National Vision 2030 Goals.

	2013	2014	2015	2030
Estimated Total contribution to GDP	3.6%	4.1%	4.7%	5.2%
Actual Tourist Arrivals	2.611 million	2.826 million	2.93 million	7.9 – 10.7 million
Estimated Employment in Tourism	67,000	73,000	76,000	98,000
Actual Rooms Available	13,577 (hotels only)	15,879 (hotels + hotel apartments)	20,713 (hotels + hotel apartments)	48,000 – 63,000

Source: QTA 2015 Annual Report, p.8.

Tourist arrivals are expected to double by 2030 and the number of hotel rooms to triple. Part of the tourist infrastructural increases (rooms, attractions, transport – metro system) will occur in conjunction with requirements for hosting the 2022 FIFA World Cup events. A Key Performance Indicator (KPI) of the 2014 tourist strategy specifically targets an increase in leisure tourists who visit for cultural experiences: QTA plans on “welcoming 1 million leisure tourists in Qatar by 2018, nearly half of whom primarily drawn by the country’s cultural offering” (QTA 2014a, p.20).

1. WHAT ARE CREATIVE INDUSTRIES AND THEIR RELATIONSHIP TO TOURISM?

The relationship of tourism and creative industries can be traced to the 18th and 19th centuries when ‘Grand Tours of Europe’ encouraged appreciation of antiquities and masterpieces of architecture, painting and sculpture; also, “the emergence of a tourism industry in Britain and North America in the early nineteenth century dovetailed with increasing affordability of tours and an appreciation of theater, painting, and architecture” (Waitt & Gibson 2014, p.230). Unfortunately, there is no currently agreed upon definition of creative industries. The traditional fine arts clearly count as creative industries, but any manufactured product in order to stay competitive in global markets must be initially designed and then redesigned to minimize cost, maximize production efficiency, and increase value to customers through ease of use and aesthetics–this design, planning and implementation process inherently involves innovation (literally creating what is new) and creativity. Similarly, software products, video games, etc. sometimes included in the definition of creative industries contain both a technical and scientific component (computer programming and architecture) as well as a creative element, such as narrative story lines in video games. Creative industries logically would include intellectual property and knowledge products, i.e. outputs based on skills, talent, ingenuity and creativity. Creativity in and of itself is also a very difficult concept to define precisely. Visual and performing arts would definitely fall within a satisfying definition of creative industries as they rely on stimulating delight, wonder, and curiosity through the creative combination of color, spectacle, sound, drama, plot variation, and action.

With several competing definitions, models, and frameworks for understanding the constellation of activities variously named cultural industries, creative industries, or creative economies, UNESCO in a 2013 report attempted to classify and clarify the previous discussions on this topic. Six classification systems were identified (see Figure 3 below) and for the purposes of this paper, the Symbolic Texts Model has been chosen as the basis of this contribution as its definitions (Core Cultural Industries, Peripheral Cultural Industries, Borderline Cultural Industries) most closely match the tourism regime in Qatar (UNESCO 2013, p.22).

Figure 3: UNESCO 2013 Classification System for Creative and Cultural Industries
Based on the *Creative Economy Reports* of 2008, 2010.

1. DCMS Model		2. Symbolic Texts Model		3. Concentric Circles Model	
Advertising Architecture Art and antiques market Crafts Design Fashion Film and video Music Performing arts Publishing Software Television and radio Video and computer games		Core cultural industries Advertising Film Internet Music Publishing Television and radio Video and computer games Peripheral cultural industries Creative arts Borderline cultural industries Consumer electronics Fashion Software Sport		Core creative arts Literature Music Performing arts Visual arts Other core cultural industries Film Museums and libraries Wider cultural industries Heritage services Publishing Sound recording Television and radio Video and computer games Related industries Advertising Architecture Design Fashion	
4. WIPO Copyright Model		5. UNESCO Institute for Statistics Model		6. Americans for the Arts Model	
Core copyright industries Advertising Collecting societies Film and video Music Performing arts Publishing Software Television and radio Visual and graphic art Partial copyright industries Architecture Clothing, footwear Design Fashion Household goods Toys		Interdependent copyright industries Blank recording material Consumer electronics Musical instruments Paper Photocopiers, photographic equipment Industries in core cultural domains Museums, galleries, libraries Performing arts Festivals Visual arts, crafts Design Publishing Television, radio Film and video Photography Interactive media Industries in expanded cultural domains Musical instruments Sound equipment Architecture Advertising Printing equipment Software Audiovisual hardware		Advertising Architecture Arts schools and services Design Film Museums, zoos Music Performing arts Publishing Television and radio Visual arts	

Source: United Nations/UNDP/UNESCO, *Creative Economy Report, Special Edition*, 2013, p.22.

Another related concern is how to define tourist activity in relation to creative and cultural industries since the topic can be studied in relation to: 1) tourists who arrive at a destination to enjoy the products of these industries, i.e. art, entertainment, and architecture; 2) business management and consulting professionals who travel to the destination to advise, maintain, and plan new initiatives in this area (i.e. MICE tourism), and 3) visiting artists and creative workers and their support staff who provide ephemeral attractions such as concerts and exhibitions. In the case of Qatar, in contrast to more developed nations, much of the creative industries expenditure has been on basic infrastructure like museums, stadia, theatres, and creative spaces as well as foreign consultants.

2. TOURISM AND CREATIVE ARTS IN QATAR

Creative arts-related tourism in Qatar can be simply divided into traditional and modern arts. Traditional patterns of living in Qatar continued into the 1980s and 1990s when the last of the Bedouin nomadic tribes were forcibly settled by the State of Qatar. The modern era of Qatar can be traced to the post-oil decades beginning in 1949 after the first shipment of crude oil from Dukhan. Before the oil era, Qatar suffered loss of population from the Great Depression in the 1930s and 1940s and the collapse of its main industry, pearl diving. In the 1950s a public school system was established, along with hospitals and modern urban infrastructure. Before the early 1990s, leisure tourism in Qatar was almost non-existent.

2.1. Traditional Arts

As Nair and Chouhary point out about Qatar's overall tourist strategy: "the society will also view tourism as an opportunity to showcase their culture and traditional values to the foreigners" (2016, p.255). The traditional Qatari society has been oriented towards the family and tribal unit and not national identity since the country is a relatively young geopolitical state, having achieved independence from Britain's protectorship system in 1971. Thus family-friendly tourism has always been the traditional basis of Qatar's tourist strategies, strongly eschewing potential hedonistic forms of behavior such as western-style nightlife (alcohol consumption is forbidden except for international non-Muslim tourists and local non-Muslim expatriates with a special license).

Many traditional arts revolve around domestic production of foodstuffs and very simple practical goods due to the nomadic lifestyles of the recent past. The emergence of modern life in Qatar can be traced to the first oil exports of the late 1940s and the establishment of a public educational system in the 1950s. Examples of traditional Qatari arts include cloth and rug making (weaving), embroidery, camel saddles, hammered metal work, black goat-hair tents, water-bags, and basic jewelry such as rings and necklaces using coins for metal. Foods include large game such as Oryx and Gazelle (which both went extinct in the last century in Qatar due to hunting from trucks), dates, sea food, small birds captured by falcons and snares, rice and meat dishes such as harees, biryani (originally from India), flat wheat breads, cheese and fermented milk (laban) which can be stored without refrigeration. Bedouins were also obviously knowledgeable about the edible and medicinal desert plants that grew wild such as desert truffle and mokhlia (*Corchorus olitorius*). The old national museum formerly provided traditional arts demonstrations like cooking and weaving by elderly locals, but this facility has been closed for refurbishment for almost a decade.

Ethnographic photographs of northern and southern Bedouin tribes in Qatar by Klaus Ferdinand and Jette Bang in 1959 reveal the sparse material culture of Qatari nomadic tribes – very simply, material objects needed to be light and portable and few in number as these tribes needed to be highly mobile as they herded animals towards ephemerally appearing grasslands (Ferdinand 1993). Thus *objets d'art* and tourist mementos found in local Qatari shops often reflect other related Arab-speaking cultures such as Syrian, Egyptian, Lebanese, etc. A nascent 'fashion abaya' industry, however,

is growing in Qatar and the UAE, in part propelled by the Fashion and Design Department at Qatar's arts and design college Virginia Commonwealth University – Qatar. Adding color and design to the abaya, however, is controversial as many Muslims believe that the purpose of female dress is to draw attention away from women and the female form.

Qatar has four major museums that showcase both traditional Qatari arts as well as modern artists active in the State of Qatar and the Gulf region: the Museum of Islamic Art (MIA), the Mathaf Museum of Modern Arab Art, the forthcoming Orientalist Museum and the yet to be completed National Museum of Qatar. Museums building has been a very recent phenomenon and all of these buildings are less than 10 years old, although smaller private and public museums did exist previously in Qatar, including historical houses of local rulers. The MIA designed by I.M. Pei houses a diverse collection of carefully curated pieces from across the Arabic-speaking world, with signature examples from all major periods – Fatimid, Mughal, Abassid, and Ummayad Eras, etc. The Orientalist Museum will display primarily 18th and 19th century paintings of European imaginings of a mythical Middle East colored by their colonial perceptions of the “other.” The new National Museum will showcase the Qatari traditional arts with a dual focus on the country's maritime history (pearling and fishing) and Bedouin heritage. Qatar has also sponsored several galleries where local Qatar artists can display their visual art, including the Garage Gallery Fire Station, Gallery Alriwaq, and Gallery Katara. According to the Chairperson of Qatar Museums H.E. Sheikha Al Mayassa Al Thani, “it is our hope that contemporary art will help Qatar and its visitors understand and put in perspective the present, the past, and the future of our culture, while constantly expanding and enriching international dialogues and local education” (Al Thani 2017).

2.2. Modern Creative Industries

Part of the QTA strategy aims to provide cultural benefits to Qatar by fostering local artistic talent. QTA predicts that its strategy will encourage the:

- Opportunity to uphold and promote Qatar's cultural legacy and traditions
- Expansion of Qatar's cultural tourism offering through projects showcasing the country's distinctive heritage and perpetuating many of its traditions
- Greater promotion of local artisans and their work
- Additional support for the development of local artistic talent (QTA 2104a, p.12).

In order to capitalize on these cultural resources, a number of small programs have been inaugurated in Qatar such as local grants to artisans and playwrights. Qatar has sponsored a national theatre since the 1970s with subsidies for local playwrights. Some of the productions, which take place in the purpose-built National Theatre, will only have appeal to a Gulf Arabic speaking audience as they are written in local dialect and deal with regional concerns, such as the history of the pearl diving industry. Abdulrahman Al-Mannai's *Layl O Layl* is a classic example of a sponsored Qatari play first written in Khaliji dialect and then translated into classical Arabic (*fusha*) for a wider audience. None of these local arts sponsorship programs, however, except for the

large-scale museums building initiative, and the Doha Film Institute discussed below, have as of yet had a noticeable international impact.

Serious interest in film as a creative industry that could contribute to economic diversification and foster increased tourist revenue both from film viewers (festivals) but also producers, actors, and directors began in 2008-9 when Robert De Niro's Tribeca Enterprises licensed its brand to The Doha Tribeca Film Festival which operated from 2009 to 2012. In 2010, the State of Qatar launched The Doha Film Institute (DFI) for a variety of strategic reasons such as building creative industries capacity and local film talent, and establishing film production in the country. H.E. Sheikha Al-Mayassa bint Hamad bin Khalifa Al-Thani spearheaded the initial development of DFI as a state-supported cultural organization.

DFI has served as a production company and investor, sponsoring films such as Ibrahim El Batout's *Hawi* (2010) and Nadine Labaki's *Where Do We Go Now?* (2011). *Black Gold (Day of the Falcon)* was the first major feature-length film project with which DFI became involved in 2011. DFI next helped produce an independent feature film by Mira Nair, *The Reluctant Fundamentalist*, a joint production of DFI, Mirabai Films and Cine Mosaic. Although now facing serious budget cuts in face of lower oil prices, the DFI has been able to offer funding and training opportunities for Qatari film makers with its Media Immersion Program which collaborates with Miramax films. Qatari film students could intern at either the London or Los Angeles offices of Miramax (Miramax). Qatari film makers created thirteen short films that were screened at the Cannes Film Festival in 2014 (DFI). In 2017, the film *The Salesman* directed by the Iranian Ashgar Farhadi and co-financed by DFI won an Oscar Award for Best Foreign Language Film.

In the last decade, the city of Doha grew rapidly with a tripling of the population and the construction of approximately 140 sky scrapers within an eight-year span. Hence entire neighborhoods of heritage buildings have been demolished. However, city planning goals have reversed with both conservation and preservation efforts taking priority as well as refurbishment of culturally significant structures. The main downtown market, Souq Waqif, has been updated, but the buildings and layout are identical to the historical appearance of this well known bazaar (Boussaa 2014). Therefore locals jokingly call the project The New Old Souq. Additionally, next to Souq Waqif stands The Msheireb Downtown Doha development, which complements the Amiri Diwan, a high security meeting hall and palace used for official international meetings. Msheireb will transform the downtown core in Doha restoring it to create an interesting blend of traditional architectural styles combining the old and the new, both to create livable spaces for permanent residences (Doha suffers from a lack of open, public, and green spaces), but also for tourists to engage in shopping, educational activities, and cultural immersion into the real lifestyles of modern Gulf Arabs. Thus tourists will be able to experience the authentic community living model of the old Doha. Msheireb will also preserve the historic Bin Jelmoed House and Al Koot Fort. Another modern cultural institution built in collaboration with the Qatar Tourist Authority, and located across the street from QTA's former offices, is Katara Cultural Village in West Bay, Doha. Katara features local club offices, the office of DFI, an art gallery and theatres as well as restaurants.

3. BARRIERS TO CREATIVE ARTS TOURISM IN QATAR

There are certain intrinsic barriers to all forms of tourism in Qatar including extreme temperatures and a small land area, with publically available recreation lands continually shrinking due to a high level of private and public construction (Weber, 2016, 2017). While winter temperatures (November to March) are pleasant with lows of 10-15 °C at night and daytime temperatures of 20-25 °C, the summer months can reach as high as 50 °C (122 °F). Also, until recently there has been underinvestment in the tourist sector, strict visa procedures for entry, lack of awareness of Qatar as a destination outside of business visits, a shortage of locally trained human capital to plan, manage and staff tourist offerings, and lack of a robust regulatory framework (laws and policy) (QTA 2014a, p.6; Weber 2013). Due to product monopolies on many goods in Qatar and the very high cost of air shipments to bring goods purchased online to Qatar, shopping is a serious issue within Qatar. The low cost of regional airfares means that regional shoppers flock to destinations such as Bahrain and Dubai to purchase electronics, books, clothing and other essentials. Despite a large effort to build malls, with 15 completed malls projected by 2017 and nine new planned shopping centers (Khatiri 2017), Qatar will have great difficulty in competing with Dubai as a shopping hub.

The majority of international tourism activity in Qatar is therefore related to businesses from outside of the Gulf Cooperation Council (GCC) of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and UAE: 73% of non-GCC tourists visited Qatar for the purpose of business, while only 23% did so for purely leisure activities (QTA 2014a, p.15). The Qatar Tourist Authority hopes to reverse this ratio to 64% leisure travel and 36% business travel for arrivals outside of the GCC. Judging from these arrival figures, Doha is therefore clearly not considered within the region or internationally as a worthwhile cultural or creative arts destination with the exception of the justly celebrated Museum of Islamic Art (Hazime 2011).

In addition, the local population is traditional, practicing strict Wahhabist or Salafist Sunni Islam, and hesitant to allow certain western cultural tourist practices to pervade the country such as western popular music concerts, alcohol clubs and bars, backpacking tourism and hostels. Alcohol drinking, only allowed to non-Muslims, is restricted to international hotels, and large popular music concerts are rare.

CONCLUSION

This research demonstrates that Qatar is making small incremental steps in diversifying its economy through tourism strategies which include creative industries. Creative industry development has taken a two-pronged path to preserve Qatar's unique Gulf heritage as well as develop a modern arts scene incorporating western art forms such as film. Qatar possesses several strong factors for future tourist development: the country is politically stable with almost no violent or petty crime due to strictly enforced norms of behaviour, its relatively unknown status as a new destination can be a draw to seasoned travellers, its traditional culture has not been subsumed by globalization and homogenization, and the destination list of Qatar Airways—a luxury airline that has

turned Hamad International Airport in Doha into a regional travel hub—has been expanding. The expanding creative arts options, such as Doha Film Institute, museums projects showcasing traditional creative arts and culture, and the refurbishment of heritage sites may help attract arrivals interested in creative industries. The lack of publically available fine-grained data and the inaccessibility of program budgets creates a barrier, however, to detailed quantitative assessments of the outcomes and impacts of these new initiatives. Value-added studies as well as the direct and indirect economic impacts of such creative industry efforts as new museums and film festivals are needed: for example, it is not known how many arrivals travel to Qatar for a specific creative event such as an art exhibition opening, as opposed to business arrivals enjoying cultural offerings as a side benefit to their professional work in Qatar.

ACKNOWLEDGEMENTS

The author reports no personal or financial conflicts of interest. The views expressed are those of the author and not necessarily those of Cornell University, Weill Cornell Medicine in Qatar, or Qatar Foundation for Education, Science and Community Development. The author would like to thank the Qatar Tourism Authority in the State of Qatar for use of their online statistics and reports. The librarians Carol Ann Nonino, Sally Birch, and Ross MacDonald of the Delib library at Weill Cornell Medicine in Qatar provided valuable assistance in obtaining hard to find reference materials. Colleagues in the Medical Department of Weill Cornell Medicine in Qatar graciously offered editorial suggestions on an early draft of this work.

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