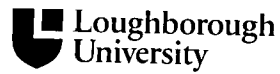


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**TOURISM IN BRUNEI DARUSSALAM:**  
**CONTENT AND CONTEXT**

by

**MONA YATI MOHD KASSIM**

**A Doctoral Thesis**  
**Submitted in partial fulfilment of the requirement**  
**for the award of Doctor of Philosophy of the Loughborough**  
**University**

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## **ACKNOWLEDGEMENTS**

In the name of Allah, the most Beneficent, the Most Merciful.

This thesis was made possible through funding by the Government of Brunei Darussalam. I must acknowledge the assistance and support from Universiti Brunei Darussalam, Public Service Department and the High Commission of Negara Brunei Darussalam in England. I was privileged to have their funding.

This thesis grew out of a series of discussions with my supervisor Professor Peter Lawrence. His comments, direction and expertise in qualitative research drew me closer to understanding the reality of my research and its rich complexity. He encouraged me to explore my cultural roots and indulged me in my writing. His sharp wit, sanguinity and incredible kindness gave me the steady encouragement to complete my thesis.

I am also indebted to Professor John Wilson and Dr Laurie Cohen for their advice and support throughout my learning experience. While struggling to finalise the research topic, Dr Allan Clarke's (Derby University) discussions and advice at the early stage of my study provided decisive direction, which gave rise to the completed thesis.

I must acknowledge the immense support and assistance shown by the Brunei Tourism Development Unit, Ministry of Industry and Primary Resources, especially Sheikh Jamaluddin Sheik Mohammad, Hj Mohd Tali Hj Abd Rahman and Hj Latif Hj Aspar. I would especially like to thank the many individuals who have contributed to the research through questionnaire survey participation or by candid discussions during the in-depth interviews. This research was made possible through the help given by the graduates from Universiti Brunei Darussalam by distributing the questionnaires to the community.

I am indebted to my friends and colleagues, who have helped me through this journey with their support, humour and firm optimism. I am very grateful to Hj Yussof Hj Mohamad, Hjh Noja Hj Gafar and family, Dk Serina Pg Sulaiman, Ak Sharin Pg Sulaiman, Norhalimah Idris and Azli Yahya for their invaluable support, comfort and giving us a home away from home.

Last but not least, my humble gratitude and deepest appreciation goes to my beloved family, my husband Ahmad Nizam, mother, father, in-laws and siblings for all their unconditional support, love, smiles, counsel, encouragement, prayer, patience, compassion and sacrifices. I am grateful for my daughter Noor Imanina for giving me the strength to carry on with her endless smiles and good cheer. I dedicate this thesis to my beloved mother and father.

To all those who have helped me, I am forever indebted to you. I devote this traditional Malay 'pantun' (quatrain) to you:

*Pisang emas dibawa belayar  
Masak sebiji diatas peti  
Hutang emas boleh dibayar  
Hutang budi dibawa mati*

Take golden bananas as we sail away  
One ripens atop a crate  
A debt of gold I can repay  
A debt of gratitude will forever be

## **ABSTRACT**

The purpose of this research was to analyse the content and context of tourism stakeholder management in Negara Brunei Darussalam and to investigate stakeholder views on tourism management, planning and development.

The author attempted to identify the web of stakeholders as perceived by the main key groups of players in the tourism industry in the months leading up to the sultanate's first ever 'Visit Brunei Year 2001'. In addition, she attempted to investigate the underlying causes of ineffective tourism management in Negara Brunei Darussalam, which operates under a strict Malay Muslim Monarchy ('Melayu Islam Beraja' or 'MIB') system of governance and national philosophy.

Many hold the view that developing the tourism industry in Negara Brunei Darussalam is a necessary stepping-stone towards diversification from its dependence on oil and gas. However, very little effort has been made to educate the general community on its benefits and disadvantages. In addition, only a very select group of people are directly involved in its planning and development leading to conflict in the community. Little has been said about real community support of tourism development and on the impact it may have on its stakeholders.

The present study has attempted to do this. Problems in tourism management, planning and development are expected to arise because of Negara Brunei Darussalam's inexperience in this field, lack of coordination and planning between government and private sectors; and, perhaps due to conflict between its MIB philosophy and the perceived negative nature of the tourism industry.

Research was conducted in several stages from November 1999 to February 2001. Data collection from the fieldwork was elicited through questionnaires administered by four trained interviewers in all four districts in Negara Brunei

Darussalam and through in-depth interviews with selected tourism stakeholders by the author.

The author observed that key players of tourism were relatively unaware of the concept of community participation in tourism development and planning, as well as the identity of a wider range of tourism stakeholders. The community at large does support tourism development and planning and expectations for accrual of tourism revenue and benefits are high. Many in the private sector have voiced the view that the government should do more to give this industry a boost. Similarly, the governmental body believes that a pro-active private sector is needed for sustainability of this industry. An alternative model to western stakeholder management is proposed that is applicable to this small Muslim sultanate.

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## GLOSSARY AND ABBREVIATIONS

<i>bandar</i>	Major town or city (Bandar Seri Begawan is Brunei's capital city)
<i>kampung</i>	A village
<i>ketua kampung</i>	The head of a village
<i>mukim</i>	A sub-district
<i>penghulu mukim</i>	The chief of a sub-district
<i>tasek</i>	A lake
<i>temuai</i>	A traditional longboat
APEC	Asian-Pacific Economic Conference
ASEAN	Association of South East Asian Nations
BIMP-EAGA	Brunei-Indonesia-Malaysia-Philippines ASEAN Growth Area
BTDU	Brunei Tourism Development Unit
BEDB	Brunei Economic Development Board
DEPD	Department of Economic Planning and Development
DO	District Office
GDP	Gross Domestic Product
IBB	Islamic Bank of Brunei
IDBB	Islamic Development Bank of Brunei
IPU	Industrial Promotion Unit
MCAT	Ministry of Culture, Arts and Tourism (Malaysia)
MIB	'Melayu Islam Beraja' or Malay Islamic Monarchy
MIPR	Ministry of Industries and Primary Resources
MRA	Ministry of Religious Affairs
MTSSR	Maktab Teknikal Sultan Saiful Rijal (vocational college)
NDP	National Development Plan
NTO	National Tourism Organisation
RBA	Royal Brunei Airlines
SARS	Severe Acute Respiratory Syndrome
SEA	South East Asia
SHuTT	Service Hub for Trade and Tourism
SME	Small and Medium Sized Enterprises
TAIB	Tabung Amanah Islam Brunei
TS	Tourism Section
UTNP	Ulu Temburong National Park
WHO	World Health Organisation
WTM	World Travel Mart
WTO	World Tourism Organisation
WTTC	World Travel and Tourism Council
VBY 2001	Visit Brunei Year 2001

## **CHAPTER 1**

### **OVERVIEW AND SCOPE OF THE STUDY**

#### **1.1 Introduction**

Tourism has been considered as an economic vehicle for both developing and developed countries and is often regarded as the first or second largest industry in many countries (e.g. Kenya, Hawaii, Goa) for its economic impact and creation of employment opportunities. Particularly in those countries with adequate natural resources for tourism development, the tourism industry is often regarded as a vital development agent and an ideal economic alternative to more traditional primary and secondary sectors.

In 1998 across the global economy, the travel and tourism industry has contributed to 11% of total GDP. In employment terms, a total of 200 million jobs were generated, which is 8% of the world's total employment. By the year 2010, this industry is projected to create 5.5 million new jobs per annum and will contribute to US\$3.5 trillion to GDP. It is estimated that by the year 2020, there will be 1.5 billion tourists; this is more than the forecasted 1 billion tourists for the year 2010 (WTO). Its Secretary General, Francesco Frangialli says '[Tourism] will not only be the world's biggest industry, it will be the largest [industry] the world has ever seen'. It is estimated that global tourist trade will generate about US\$5 billion a day in 2020.

Asian nations facing a downturn in their tourist industries may find some comfort in a recent report by the World Tourism Organisation, which says the Asia-Pacific region will witness the world's fastest growth in tourism by 2010. The WTO also predicts that China will be the world's favourite destination by 2020, and that Hong Kong will take fifth place. Globally, the organisation says almost 592 million people travelled abroad in 1996, up 4.5% from 1995. Arrivals in the Asia-Pacific region, however, leapt 9.3%, and growth is forecast to average about 8% a year over the next 10 years. Tourist receipts in the region reached US\$81 billion in 1996, almost 10% upon 1995. This profitable trend is set to continue. In other less developed Asia-Pacific countries,

embarking on tourism initiatives is gathering more momentum because of the potential economic benefits this industry brings.

Singapore known as the "travel destination miracle", ranks first amongst the tourism players in the ASEAN community. This small island country has approximately 3 million people but attracted 6.4 million tourists and generated \$7.6 billion (excluding transport) in tourism receipts (WTO 1996). This is followed by Thailand, Indonesia, Philippines, and Malaysia. The other countries namely Vietnam, Laos, Cambodia and Brunei all lag behind in terms of tourism receipts.

The inter-related businesses that form the tourism industry makes it very difficult to implement a holistic strategy for its management in each particular country. Stakeholder goals and expectations must be reached. At the heart of tourism lies the tenet that it should benefit the host community through integrated value added tourism activities carried out at local level. The host community would be lead by strong government direction combined with solid private sector assistance to ensure sustainable tourism development. Since tourism require careful management of multiple stakeholder needs, it is crucial that the National Tourism Organisation (NTO) involved carries out effective and efficient stakeholder management. Therefore, the overall purpose of this study was to analyse the nature of stakeholder management in the tourism industry in the context of Negara Brunei Darussalam (Brunei) as perceived by the explicit stakeholders and to gain an understanding of stakeholder views on this fledgling industry.

An overview of the whole research study is presented in this chapter, which is divided into eight sections. An introduction of the subject of the research topic and chapter contents is provided in Section 1.1. A synopsis of the research problem, research objectives, and justification for undertaking this research study is presented in Sections 1.2, 1.3 and 1.4 respectively. Section 1.5 is dedicated to the importance of this study within the ASEAN and Brunei context respectively. An outline of the limitations of the study is provided in Section 1.6. Section 1.7 relates to the methodology utilised in data collection

for the fieldwork. The concluding section, Section 1.8 provides an outline of the thesis format.

## **1.2 The Research Problem**

Brunei Darussalam is reputed to be one of the richest countries in the world. Indeed, it has amassed great wealth through its oil and gas industry since its independence in 1984. The nation's social and economic standing was rapidly developed and by 1997, the populace enjoyed the second highest GDP per capita in ASEAN (the first being Singapore). This was estimated at US\$14,800. In Asia, this was the fourth highest after Japan, Singapore and Hong Kong. On a global scale, Brunei was ranked the twenty-fourth highest in the world thus surpassing even the standard of living of Ireland, Spain and New Zealand.

Propelled by an oil-derived wealth, a somewhat complacent society developed. Brunei was seen as suffering from the symptoms of 'Dutch disease', endemic in a 'rentier' nation. Cornered to its other more advanced and competitive Asian neighbours such as Singapore and Malaysia, and a victim of the 1997 Asian financial crisis, Brunei's economic health is jeopardised.

There is an urgent need to restructure its economy from its unsustainable oil and gas industry towards a more market-driven, internationally competitive and diversified economy that is strongly supported by the private sector. However, the challenge is made more difficult in that the ultimate goal is to provide all Bruneians with the same high standard of living and generate sufficient and meaningful employment on an economically and socially sustainable basis. The government is now looking towards tourism development as a means to achieve economic development.

However, previous attempts to diversify from oil and gas have been met with certain cynicism due to the many limitations faced by Brunei in terms of technological know-how and available local qualified human resources.

Brunei is heavily reliant on foreign workers and the small tourism industry is not an exception to this rule. Furthermore, the Government has previously sent mixed signals about its commitment to building this industry and its ambivalent attitude has sent confusing messages to the public sector intent on eating a piece of 'touristic cake'.

During the Sixth National Development Plan period (1991-1996), the government undertook a major step by moving the Tourism Unit from under the auspices of the Economic Development Board, Ministry of Finance to the Ministry of Industry and Primary Resources. The Seventh National Development Plan (1996-2000) served to highlight the government's firm intent in supporting this industry when tourism was specifically mentioned. 'In order for the tourism sector to flourish, support facilities and services of other economic activities such as accommodation, communication and transportation, banking, etc need to be expanded. The tourism industry has the potential to contribute to the national economic development. Tourism affects many business establishments and offers meaningful employment to many people at various levels and careers. In promoting tourism, Brunei Darussalam is not to compete with others, but to complement and add value to the region as a single destination.' (Seventh National Development Plan, 1996-200. p68).

This Development Plan also highlighted the 'promising' future of Ecotourism in the country. It mentions specifically the following steps necessary for tourism development to increase tourist arrivals:

1. Brunei Darussalam will be promoted as a gateway to BIMP-EAGA (Brunei Darussalam-Indonesia-Malaysia-Philippines-East ASEAN Growth Area)
2. Brunei Darussalam will actively participate in joint promotion of tourism in international exhibitions
3. Royal Brunei Airlines (RBA) will continue to expand its services by adding new destinations and at the same time, more airlines will be encouraged to land in Brunei Darussalam

4. Government support services such as passport and visa offices in embassies and foreign missions will be expanded to facilitate travel to Brunei Darussalam and
5. The availability of suitable accommodation will also be addressed, particularly by the private sector

In 1998, the Brunei Tourism Development Unit (BTDU) commissioned a Tourism Masterplan, which provides a comprehensive implementation process for effective tourism development in Brunei. However, the relatively small power, capacity and capability of the BTDU and current economic downturn cast doubt on whether the implementation plan was truly feasible. Significantly, the apparent lack of consultation with community members prior to the development of the Masterplan itself raises questions with regard to community support in tourism development in the first place.

Tourism development perhaps appears to be in direct conflict with predominant cultural values. For example, entertainment in the form of nightclubs is prohibited in Brunei as well as the sale of alcohol. These are typical products of the tourism industry. However the situation in Brunei shows that this will severely impact on tourism arrivals because western tourists consume these products during their holidays. Another factor that appears to be in direct conflict with governmental policy towards tourism development is the lack of qualified local labour to fill the gap in the services industry. The only technical college in Brunei has just recently launched an ordinary national diploma course on hospitality in 1999, which is accredited to an overseas institution. Brunei is marketing itself on the international arena as a prime tourist destination in 2001. It is glaringly obvious that the number of graduates from the technical college falls far below industry needs.

Within the administrative context, great challenges must be overcome in order to develop this industry effectively. Many examples may be cited which indicate that the governmental agents are ill-equipped to deal effectively with the complexities of tourism policy making and development. There are very few locals who have direct industry knowledge who may be responsible for

educating the populace on the benefits, and downside, of tourism. One example is the necessary use of District Officers as moderators and activators of tourism development in the four districts in Brunei. The district officers themselves are government bureaucrats or administrators who have the difficult task of disseminating information on tourism to the village heads of each district. These civil servants themselves have limited tourism education thus limiting their role as tourism developers. Furthermore, these district officers have no authority to give full support to village heads when the latter offers proposals on tourism development within their own local community.

The inconsistent policies and practices are due to the lack of coordination and consistent mutual consultation amongst those who are directly involved in tourism development policymaking, decision-making and implementation. Therefore, all these issues would have a great impact on tourism growth in Brunei.

The implementation of tourism development indicated that the policy of top-down management from the government to other stakeholders would be exercised. Yet, effective tourism management can only be realized through effective and efficient communication to and from educated key stakeholders; thus there is an underlying need for a reconstruction of current channels of communication and relationship building within this new industry. Hence, there is a need to map out who really matters in tourism, and to examine their needs, values, and assumptions in general and ensure that there is a cohesive, coherent and comprehensive goal that all stakeholders should endeavour to achieve. Fundamentally, the stakeholders should have concrete ownership of the direction of development of this industry.

Evidence of policy mismatch and practice is clear and examples are numerous. As aforementioned, the multitude of potential problems that may arise within the tourism context in Brunei requires a thorough stakeholder analysis. Policy makers must be able to implement tourism policies and must re-examine the relationship between all relevant stakeholders. Careful attention should be placed on building a more creative working relationship



between the BTDU and the Ministry of Religious Affairs (MRA) if tourism is to truly 'deliver the goods'.

With reference to the problems highlighted, there is an urgent need to begin to address the issue of tourism development in the Brunei context. In particular, the study of tourism stakeholder management requires an in-depth analysis of who really matters and what their perceptions are of tourism and if sustainable tourism development and community-based tourism is to be implemented.

### **1.3 The Research Objectives**

This research is designed to investigate the extent of stakeholder management in Brunei's fledgling tourism industry, with particular reference to whom the stakeholders are and their perception of this industry. An understanding of the processes, context and content of tourism from a host nation perspective is necessary to assess the effectiveness of current tourism policies. Furthermore, it serves as a significant contributing factor to determine future tourism development goals, policies and decision-making processes.

Thus, the study has the following main objectives:

- 1) To analyse the tourism industry and prevalent tourism management practices in Brunei;
- 2) To examine the extent of community participation in the tourism process;
- 3) To establish the views of various stakeholder groups as identified by the tourism policy makers on tourism community participation and tourism management leading up to Visit Brunei Year 2001;
- 4) To determine the difficulties in implementing effective tourism management in a small Islamic country;
- 5) To clarify the expectations of the various interest groups and to reconcile their needs into a coherent, comprehensive and competitive tourism strategy for Brunei;
- 6) To propose a tourism development model that is suited to the country's local religious, cultural and social values.

The current problems and issues of tourism development in the Brunei context outlined above, with background information provided in Chapter 2, are enumerated below for convenience:

1. What are the underlying assumptions and primary objectives for tourism development in Brunei?
2. What identifiable issues were addressed in planning for tourism development? E.g. socio-cultural issues etc.
3. What are the main concerns for tourism development in Brunei?
4. Was tourism development and planning carried out in a comprehensive manner, which addressed critical issues?
5. How coherent and workable is the planning and development of tourism in Brunei?
6. Are there any perceived operational problems involved in developing this industry?
7. What is the perceived nature of the relationship between MIB and tourism in Brunei?
8. How adequate is tourism training for locals in Brunei?
9. Do gender issues exist in tourism employment?
10. What is the extent of community involvement in tourism planning in Brunei?
11. What is the perception of the community towards tourism development?

They represent a formulation and disaggregation of our overall research question. They are also themes and issues, which were both explored in the interviews and used to construct the written questionnaire. The incorporation of these issues in the data collection is taken up again in Chapter 3 (p.102-106).

## 1.4 Justifications of the Research Study

The wealth accrued from Brunei's oil and gas industry has falsely created the belief that Brunei's wealth will never run out. However, current economic instability has led to Brunei's prosperity being severely jeopardized on a massive scale (Borneo Bulletin). The government realizes that this worrying trend requires drastic changes in how the national wealth is generated. Tourism is a relatively easy 'soft' option for development. Many countries have undeniably reaped the economic rewards from tourism to ensure continuity of their socio-economic development.

In the Brunei context, tourism is a newly emerging industry. In promoting the tourism industry, the religious, moral and cultural values of the country will be fully preserved and respected. To support the development of eco-tourism in particular, the over-exploitation of natural resources as well as damage to the environment has to be avoided.

*Source: Seventh National Development Plan 1996-2000 (p.71)*

In many developing countries, where tourism has grown in an *ad hoc* manner and been left unchecked, this has led to a variety of problems. Numerous studies have illustrated the painful side-effects of tourism development which have been detrimental to the host nation. These include undistributed benefits of tourism receipts, spatial tourism development, irreparable environmental damage, the proliferation of the sex industry leading to the degradation of moral and societal values, 'cultural dilution' and 'cultural commoditisation' and so forth.

One can easily refer to these world-wide examples as cogent illustrations of the negative aspects of tourism. Therefore, tourism in Brunei Darussalam should not and cannot be left unchecked. The painful process of reversing the negative side effects will take many years if indeed the damage is rectifiable at all. This is something which the small sultanate can ill-afford or manage.

Tourism development on a large scale in Brunei is entering uncharted territory. Lessons may be learnt from other ASEAN countries but even so, local research on tourism is limited. This phenomenon merits investigation because of the multiple issues involved in tourism development within this region. Research on ASEAN (Association of South East Asian Nations) tourism has matured from discrete anthropological and geographical discourse to multidisciplinary research. Cohen (1989) highlighted issues in Thailand's tourism development and focused on hill tribe tourism as well as its sex industry. Richter (1993) provided insightful perspectives on tourism policy-making in Asia. Finally, an interesting range of tourism issues and research was compiled in *Tourism in South-East Asia* (Hitchcock, King and Parnwell, 1993).

Brunei is on the island of Borneo and is flanked by its Indonesian and Malaysian neighbours who are already many years ahead in terms of tourism development. Yet, research addressing tourism issues on this island is still limited. Din (1992) explored the relevance of tourism to socio-economic development in Sarawak. Baum and Conlin (1997) attempted to explain tourism development in Brunei under a strict Islamic ethos and provides an interesting western perspective on this issue.

Tourism's receipts and earnings in Borneo if captured are lucrative. Malaysia is aggressively pursuing this market by devoting millions of ringgit into upgrading its tourist attractions in both Sabah and Sarawak after achieving tremendous success during Visit Malaysia Year 1994. Even Brunei has earmarked BND5 million dollars to develop this industry (Borneo Bulletin Yearbook 2000) and expects up to one million tourist arrivals during Visit Brunei Year 2001.

Due to the anticipated growing demand for 'tourism products' in the form of new and exotic destinations, important emerging issues will appear that have great impact on tourism development on Brunei. Thus research on Bruneian tourism from any dimension is therefore necessary to fill in the gap in our knowledge.

## **1.5 Significance of the Research Study**

In general, research on tourism in Brunei is very limited. Ahmad (1999) has carried out one study on the local perception of ecotourism development amongst the Iban and Dusun communities in the Temburong district. Within the context of Brunei and the ASEAN countries, there have been no studies conducted, which attempt to analyse local tourism stakeholder management, identify key tourism players provide an analysis of local community based tourism planning and development. Thus community views on tourism are widely unknown. The processes of tourism management in Brunei remain an enigma to many people.

Concurrently research within this specific area that concentrates on small Moslem states is also negligible. Most of the recent articles have focused on the applications of stakeholder management theory in tourism yet this has been confined largely to western destinations. Therefore, the research findings will serve to enrich and illuminate current data available on this topic and provide a platform for future research studies both in the local and international area.

It is taken for granted that government initiatives have full and unequivocal support from the general population. This appears to be true in many instances. However, there exist audible concerns and opinions which are voiced quietly amongst the community. It is this murmur which the researcher is interested in and has set out to find.

The results have been overwhelmingly supportive of the fact that despite the acceptance that tourism development will occur in Brunei, scepticism concerning the country's market competitiveness abound. Most believe that tourism should be for the benefit of the local population. They also believe that cultural traditions, values, morals and ethics should not be compromised for the sake of a few dollars when the losses of such intrinsic treasures are immeasurable.

The Brunei experience may provide valuable lessons to others. Undoubtedly, these findings will be useful for tourism policy-makers, policy implementers, tourism educators and researchers, especially when it refers to small Muslim states that may be in similar situations.

In terms of tourism developmental model building, the significance of this research study is acute. Brunei's unique national philosophy provides a new dimension to the construction of developmental modelling in that it brings in the moral and ethical perspectives into account.

The research findings may also serve to support or undermine other prevalent tourism paradigms because of the different socio-economic, cultural and political context of Brunei *vis à vis* other tourist destinations. For example, comparisons may be made with other more mature western tourist destinations such as America and Europe.

Most importantly, the findings may serve as a guideline to future tourism planning, development and decision-making processes by governmental bodies involved in this industry. Any inadequate mechanisms employed during the course of tourism planning and development may be changed and improved thereby positively contributing towards sustainable tourism development. In the long run, it is hoped that this will lead to eventual achievement of national goals in diversifying its economy from oil and gas.

Proactively addressing the issues of tourism development in Brunei will help the civil servants at all governmental levels to become more aware of stakeholder needs and interests and thus should help to reconcile divergent goals to one cohesive and coherent goal. The improved mechanism and widened channels of communication will help to create effective tourism development and planning in Brunei, one that will ultimately benefit the community.

## 1.6 Limitations of the Study

There were numerous problems and limitations encountered during this study. Secondary data collection proved to be problematic due to the difficulty involved in gaining current tourism statistics and information. Regulations pertaining to the release of official government documents required formal letters of requests but in most cases, the necessary information was simply not available. Time also proved to be a limiting factor as the sources of information were located at different places and many channels of communication had to be approved before any information was released.

During the fieldwork, the author encountered some non-responsive interviewees who were reluctant to offer any real opinions to some questions which they perceived to be sensitive or may have negative repercussions. Respondents sometimes appeared to provide answers that they feel the researcher would like to hear thus casting doubt on the validity and reliability of the data elicited. Some respondents communicated their answers in Malay, which meant that some of the meaning was lost in translation into English. The researcher accepts that all the data collected is subjective to personal interpretation. This affects the results of the findings and hence any conclusion drawn by the researcher in this study.

The survey questionnaire was first constructed in the English language. It was printed in both Malay and English but as said, a problem exists in that in some sentences, a literal translation of the English questionnaire became meaningless or was too confusing in Malay. The Malay version was thus simplified which again raises problems in both its reliability and validity. With regards to the semi-structured interviews, active discussion was promoted to increase the reliability of the data as acting in a formal and stiff manner was likely to enhance the obtrusive nature of the line of questions.

The author found that western literature on this topic was heavily eurocentric in nature and thus may not be applicable or indeed transferable to the Brunei context. The proposed tourism developmental model is confined to small

Muslim countries, which makes its applicability limited to countries of similar context that may offer the possibility of generalization. Finally, meaningful data may have also been lost during data analysis and interpretation especially during data coding (organisation and categorisation). This may have lead to less fruitful findings in the research.

In this section 1.6, we have felt it necessary to detail difficulties encountered and possible limitations, and to do this in a spirit of scholarly honesty. At the same time, these difficulties, for the most part specific to the Brunei context do not undermine the overall validity of the research, and the researcher has been at pains to compensate for these difficulties using her own understanding of the whole cultural milieu.

### **1.7 Data-Collection Procedures**

Perceptions of key stakeholders and the community on tourism development in Brunei were sought in this study. Semi-structured interviews were conducted with top government officials from various Ministries, educators, hoteliers, travel agents, village heads, district officers, district tourism representatives and media representatives. Their responses were recorded and analysed to provide an in-depth perspective of tourism stakeholder management issues in Brunei. Community views on tourism were elicited from survey questionnaires. The stakeholders interviewed were selected on the basis of their willingness to participate in this research and also on being recommended by a previous stakeholder. Strict confidentiality of interviewee names was guaranteed during this study. The interview data obtained were supplemented by data collected from the questionnaires.

The qualitative nature of the study did not require the use of complex tools of data analysis. Rather the study was delimited to employing simple statistical tools namely percentages to enrich the qualitative data. The research data is presented in Chapters Five and Six.



## **1.8 Organisation of the Thesis**

Organisation of this thesis falls into eight chapters. This first chapter serves to present an overview of the following: the subject of the research study with chapter contents, the research problem, the basis of the research questions, validation for the research study, implications and significance of the research, limitations of the study, data collection procedures and organisation of this thesis. Chapter Two provides a synopsis of the socio-economic, cultural and political context of Brunei. An overview of Brunei's geography, history, government and politics, economics and employment situation is presented. The evolution of tourism planning and development is also presented along with the chapter's concluding summary. Chapter Three introduces the literature review of selected academic discourse on tourism with particular reference to stakeholder management planning as a normative tool in tourism management and the author's perception of the relationship between predominant Brunei's Malay, Islamic, Monarchy value system and tourism.

Chapter Three also discusses the research methodology employed during the fieldwork. Both qualitative and quantitative techniques of research methodology are explored and reasons for justifying their employment in this study are highlighted. The research design process and methodology of the research including questionnaire design and research question formulation is reviewed.

The methodology used during data-collection comprising of in-depth semi-structured interviews, survey questionnaire and fieldwork experience during this study is outlined. The data coding and analysis technique is also included and discussed.

Chapters Four, and Five presents the research findings from the survey questionnaire and in-depth interviews. Chapter Six illuminates key findings for the research study, which have deep implications for tourism stakeholder management in Brunei. Chapter Seven discusses the urgent need for

theoretical modelling for tourism development and tourism within a Bruneian context. A developmental model for Brunei is constructed and presented in this chapter.

Chapter Eight provides an overview of the tourism policy in Brunei whereby changes to its management and development are proposed within an Islamic Bruneian Malay framework that will create a more vibrant industry, strengthen community involvement and empowerment, and will hopefully create better communication and consultation synergies. This chapter concludes with an overview of the implications for future research development, model theory building with reference to small Islamic states, tourism practices and further research.

## **CHAPTER 2**

### **THE RESEARCH CONTEXT - NEGARA BRUNEI DARUSSALAM**

#### **2.1 Introduction**

This chapter is dedicated to presenting the context of study that delineates the processes, content and context of tourism planning and development in Brunei in brief. However, a detailed understanding of the political, economic, social and cultural context of the country must first be examined as a basis to comprehend the nature of tourism in Brunei. Gaining this insight into the context of Brunei will provide a tool for either generalised (similar context to Brunei) or specific (dissimilar context to Brunei) comparative study purposes.

This chapter details Brunei's socio-economic background as well as a description of tourism development in Brunei, issues and problems affecting this small industry. The critical issues in tourism in Brunei form the basis for questionnaire design and construction of research questions.

Section 2.2 relates to Brunei's geographical context whereas Section 2.3 provides a brief history of this small sultanate. Section 2.4 relates to a summary of the system of governance in Brunei which consists of an eclectic mixture of the British Constitution (1959) and the traditional Malay Islamic Monarchy system. Section 2.5 provides an outline of Brunei's population demographics. This is followed by an overview of Brunei economy in Section 2.6 and rates of employment in Brunei in Section 2.7.

Brunei's unique national philosophy is the 'Melayu Islam Beraja' (Malay Islamic Monarchy) concept which is practised and reinforced daily. It is this concept that shapes all forms of governance in Brunei. Section 2.9 provides a synopsis of the evolution of tourism policy and management in Brunei. This is followed by a summary of the Brunei Tourism Masterplan in 1998 in Section 2.10. An analysis of the current tourism context and trends in Brunei is presented in Section 2.11. which includes an analysis of visitor arrivals in Brunei (including tourists), tourism related employment, an overview of the

hotel and travel agency, budgetary considerations of the NTO, tourism and hospitality training and other tourism-related education and a profile of tourists into Brunei. Section 2.12 relates to some strategic considerations in tourism development in Brunei. Finally, Section 2.13 provides a conclusion to the chapter.

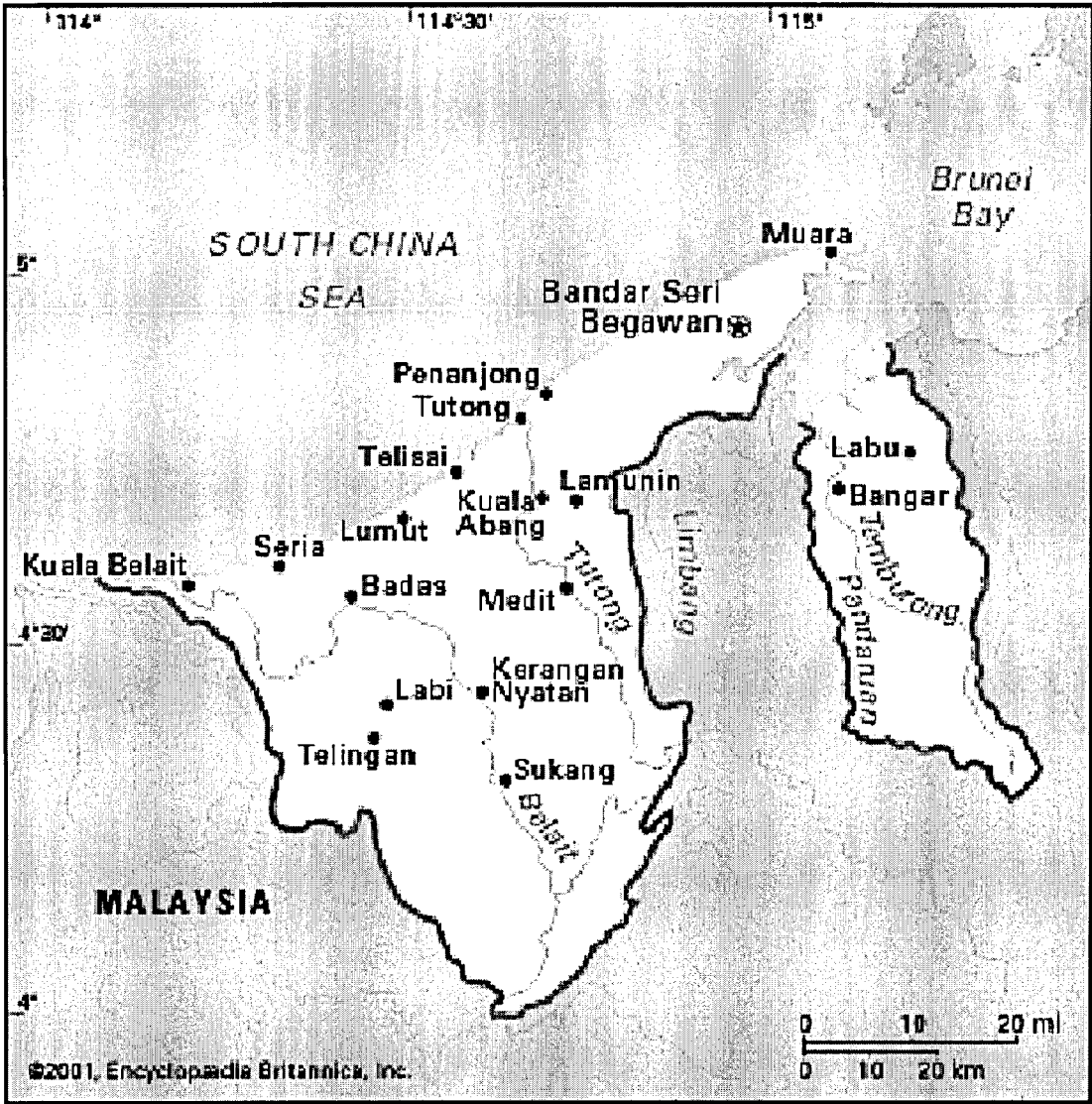
## **2.2. Geography**

Negara Brunei Darussalam is situated on the island of Borneo and is sandwiched between the eastern Malaysian states of Sabah and Sarawak. It lies on the north-western part of the island between east longitudes 114 degrees 04' and 11 degrees 23' and north latitudes of 4 degrees 00' and 5 degrees 05'. This equatorial country has a total area of 5,765 –sq. km with a northern coastline facing the South China Sea (See map in Figure 1.)

Brunei Darussalam is comprised of four districts namely Brunei-Muara, Tutong, Belait and Temburong covering a land area of 570-sq km., 1166 –sq km., 2724 –sq km and 1304-sq km. respectively. The predominantly hilly lowland western terrain of the country lies 91 metres below sea level but rises up to 300 metres in the hinterland. The eastern part, the Temburong district, is mountainous rugged terrain rising to 1,850 metres above sea level at Bukit Pagon. The 161 km coastal line is a wide, tidal and swampy plain that is rich in hydrocarbons deposits, the source of Brunei's wealth.

Brunei's equatorial climate is characterised by a warm yearly climate, high humidity and heavy rainfall. The temperature ranges from 23°C to 32°C. while annual rainfall ranges from 7,500 mm in the interior to 2,500 mm in the coastal region (BBBY, 2000). Some 70% of the land is covered by unexplored pristine tropical rain forest which is home to many unique flora and fauna.

Figure 1. Map of Brunei



source: <http://geography.about.com/library/cia/blcbrunei.htm>

### 2.3A Brief History of Brunei

This sultanate, once described as ‘Venice of the East’ by Antonio Pigafetta in 1521 to describe the glorious splendour of this Malay sultanate which has a 600 year recorded history. In historic terms, this has helped to reinforce a well-established Malay cultural norm and identity with a strong Islamic philosophy. Brunei which became a British protectorate in 1884, has always had the fortune to be a prosperous state but it was only when oil and gas was discovered in Seria that Brunei came truly achieved prosperity.

This precious resource was discovered under the reign of the 26<sup>th</sup> Sultan of Brunei, Sultan Muhammad Jamalul Alam II (1906-1924), who brought about the beginning of socio-economic development in Brunei. However, rapid development was truly initiated by the 'Architect of Modern Brunei', Sultan Omar Ali Saifuddien (28<sup>th</sup> ruler, 1950-1967) who is father to the present Sultan. It was he who shaped the political and structural environment of modern Brunei in the 1950s and first used Brunei's oil revenues to finance Brunei's first five-year national development plan. The current ruler of Brunei, His Majesty *Sultan* Haji Hassanal Bolkiah, is now the active and highly visible symbol of governance for Brunei. On 1<sup>st</sup> January 1984, Brunei gained full independence from Britain.

## **2.4 System of Governance in Brunei**

Brunei's past history of being a British Protectorate State has deeply influenced its governmental, administrative, legal, political and educational systems. The legal, administrative, political and governmental system is an eclectic mixture of the British Constitution (1959) and the traditional Malay Islamic Monarchy system that is discussed in a later section. The Sultan of Brunei has multiple roles in Government and has sole executive power of governance. He is the Head of State, Head of Government, Prime Minister, Minister of Finance and Minister of Defence.

There are twelve autonomous Ministries in the Ministerial Cabinet all of which report directly to His Majesty the Sultan in the Prime Minister's Office. The Ministries are as follows: the Ministry of Home Affairs, Communication, Finance, Education, Health, Welfare, Youth and Sports, Industry and Primary Resources, Defence, Finance, Foreign Affairs and Religious Affairs.

The Sultan's uniquely approachable and open relationship with his people is illustrated by frequent visits to the community, government and private sectors. Brunei's system of governance is based on Islamic principles as indicated by His Majesty the Sultan's keynote address upon the proclamation of the Brunei's independence in 1984.

Brunei Darussalam shall forever be a sovereign, democratic and independent Malay Muslim Monarchy upon the teachings of Islam according to the Ahli Sunnah Wal-Jamaah and based upon the principles of liberty, trust and justice and ever seeking the guidance and blessings of Allah (to Whom be praised and Whose name shall be exalted) the peace and security, welfare and happiness of the people of Brunei Darussalam.

*Source: Brunei Darussalam Seventh National Development Plan (1996-2000)*

### 2.5 Population

According to the latest Internet figures as shown on the official Brunei government website, the population of Brunei in mid-year 2002, is estimated to be 330,700 persons. The number of males is slightly higher than females at 175,200 and 155,500 respectively. This figure includes the predominant Malay population – Brunei’s indigenous communities of Malay, Kedayan, Tutong, Belait, Bisaya, Murut and Dusun at 67.6% (223,500) of the whole population. Other indigenous groups namely Iban, Dayak and Kelabit account for 19,600 persons (5.9%) , Chinese at 49,3000 persons (14.9%) and other unspecified races at 38,3000 persons (11.6%). Table 1 illustrates the ethnic composition in mid 2002.

**Table 1. Ethnic composition in Mid 2002**

Ethnic Race	Number	%
Malay (Brunei Malay, Kedayan, Tutong, Belait, Bisaya, Murut and Dusun)*	223,500	67.6
Chinese	49,300	14.9
Other unspecified (e.g.Indian)	38,300	11.6
Other indigenous groups (Iban, Dayak and Kelabit)	19,600	5.9
Total	330,700	100.0

*\* Brunei Malay tribes (Puak Melayu): Melayu Brunei , Melayu Kedayan, Melayu Tutong, Melayu Belait, Melayu Bisaya, Melayu Murut and Melayu Dusun)\**

*Source: [www.bruneigov.bn](http://www.bruneigov.bn)*

The most populous area is Bandar Seri Begawan, the capital city located in the Brunei-Muara district and is home to 218,800 persons (66.2%). The least populous is Temburong with a population of 9,400 persons. Belait and Tutong have 66,800 persons (20.2%) and 35,700 persons (10.8%) respectively. Table 2 shows the distribution of the population within these four districts.

**Table 2. Districts Population Density in Brunei**

District	Number	%
Brunei-Muara	218,800	66.2
Belait	66,800	20.2
Tutong	35,700	10.8
Temburong	9,400	2.8
Total	330,700	100.0

*Source: 8th National Development Plan (2001-2005)*

Brunei's population indicates a median age of 25 which is a youthful age grouping. About 107,600 persons (32.5%) are below 15 years, 211,900 persons fall into the working age group between 15 and 64 years whilst only about 11,200 persons are over 65 years of age (3.4%).

According to the 8th National Development Plan (2001-2005), there is a decline in the annual growth rate from 3% in the period 1991to 1995 and from 2.6% in the years from 1996 to 2000. The population is declining because of a fall in total fertility rate (TFR) from 3.9% in the last decade to 3.0% per woman.

This is because of the following factors: late marriage, increased female participation in the workforce, increasing levels of education in women and the changing lifestyle of the family unit. The infant mortality rate fell from 6.9% per 1,000 births in 1996 to 6.0% per live births in 1999. At the same time, the average life expectancy has also increased form 70 years to 73.4 years.

Male life expectancy is slightly lower at 74 years compared to 76.3 years for females in 1999. The Brunei population is also highly literate. The literacy rate increased from 80% in 1985 to 90% in 1995 and reached 93% in 2000;



this illustrates the success of the government's drive to increase the development of education in Brunei.

## 2.6 Overview of Brunei Economy

Brunei's economic development prospered as a result of the discovery of oil and gas in Seria in 1929. Brunei Darussalam is seen as being one of the richest countries in the world. Indeed, it amassed great wealth through its oil and gas industry since its independence in 1984. The nation's social and economic standing was rapidly developed and by 1997, the populace enjoyed the second highest GDP per capita in ASEAN (the first being Singapore). This was estimated at US\$14,800. In Asia, this was the fourth highest after Japan, Singapore and Hong Kong. On a global scale, Brunei was ranked the twenty-fourth highest in the world thus surpassing even the standard of living of that in Ireland, Spain and New Zealand. Brunei's Gross Domestic Product (GDP) and its respective GDP per capita at current prices are shown in Table 3.

**Table 3. Brunei's Gross Domestic Products at Current Prices and Gross Domestic Products Per Capita**

Year	GDP at Current Prices (B\$ million)	GDP Per Capita (B\$ thousand)
1992	6,565.1	24,570
1993	6,585.1	24,077
1994	6,686.2	23,837
1995	7,394.2	25,737
1996	7,408.6	25,157
1997	7,628.1	25,284
1998	6,534.0	21,111
1999	7,114.7	22,546
2000	7,441.1	22,910
2001*	7,163.9	21,526
2002*	7,351.1	21,570

*Source: Department of Economic Planning and Development, Prime Minister's Office*

*Note: \* Provisional*

These figures however do not show the income distribution of the Bruneian population. According to statistics, Brunei's economic performance has

fluctuated over the years. The annual growth rate of GDP has fluctuated ranging from -4% to 4% within the years 1992 to 2002 as shown in Table 4.

**Table 4. Annual Growth Rate of Gross Domestic Product from 1991 to 2000**

<b>Year</b>	<b>Gross Domestic Products Annual Growth Rate (%)</b>
1992	-1.1
1993	0.5
1994	1.8
1995	3.0
1996	1.0
1997	3.6
1998	-4.0
1999	2.6
2000	2.8
2001*	0.8
2002*	3.9

*Source: Department of Economic Planning and Development, Prime Minister's Office*

*Note: \* Provisional*

The varying economic growth rate is due to structural adjustments that the country experienced in the light of declining oil prices, governmental over-spending and the effect of monetary changes such as the depreciation of the American dollar. The effects of these factors caused the lowest recorded economic growth in 1998.

In 1999 and 2000, the economy improved largely due to an increase in the performance of the oil and gas industry, which saw an increase in the price of oil per barrel from US\$18.48 to US\$30 in those years. At the same time, the non-oil sector did not grow favourably at 1.5% and 2.8% for 1999 and 2000 respectively after achieving a high growth rate of 5.7% in 1998.

The non-oil sector comprises part of the government and all of the private sector. The fastest growing services and economic activities in the country for the past decade have been the community, social and personal services. In 1999 and 2000, the worst hit industry within this sector was the construction

industry followed by services such as transport and communications, hotel and restaurant, wholesale and retail and the business industry.

As these industries relied heavily on government support, the economic crash in 1998 had a disastrous effect on its overall well being as many government projects had to be delayed, suspended or abandoned due to a shortage of funding. The government was however able to offset the negative economic growth in the private sector slightly by the injection of temporary revenue from hosting the South East Asian (SEA) Games in 1999 and the Asia Pacific Economic Council (APEC) meeting in 2000.

As the country's wealth is inexplicably linked to international oil and gas prices, it is only natural that its economic well being is affected by these commodities. Sustained by an oil-derived wealth, a complacent society developed. Brunei was seen as suffering from the symptoms of 'Dutch disease', endemic in a 'rentier' nation.

Cornered by its other more advanced and competitive Asian neighbours such as Singapore and Malaysia, and a victim of the Asian financial crisis, Brunei's economic health is jeopardised if serious consideration and action is not undertaken to restructure its economy from its unsustainable oil and gas industry towards a more market-driven, internationally competitive and diversified economy that is strongly supported by the private sector.

It is for this primary reason, to erase its over-reliance on its oil and gas industry, that the national development plans, from the Fourth National Development Plan (NDP) in 1980 to 1984 until the present plan have been formulated to achieve greater economic diversification. However, the challenge is made more difficult in that the ultimate goal is to provide all Bruneians with the same high standard of living and to generate sufficient and meaningful employment on an economically and socially sustainable basis. The government realises that the key is to develop a vibrant private sector. However, throughout the Fifth Plan (1986-1990), the Sixth Plan (1991-1995) and Seventh Plan (1996-2000), this sector has been fairly stagnant with an

annual growth rate of 6.4%, 5.9% and 5.6% respectively. It is hoped that in the course of the implementation of the Eighth Plan (2001-2005), beneficial economic changes will occur that will improve the non-government sector greatly.

### 2.7 Employment and Unemployment Rates in Brunei

The Brunei population of Brunei Darussalam has always been small. In 2001 the overall population was estimated at 332,844 people (Table 5). Out of the total labour force of 154,200 people in that year, 145,600 were employed and the remaining 8,600 were seeking jobs. This is a hefty unemployment rate of 5.6% for such a small country.

**Table 5: Local Labour Participation in Brunei Darussalam**

<b>Labour Rates</b>	<b>1991</b>	<b>1995</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>
Labour Force (Thousands)	111.9	122.8	143.7	148.3	154.2
Employed (Thousands)	106.7	116.8	137.2	141.3	145.6
Unemployed (Thousands)	5.2	6.1	6.5	7.0	8.6
Unemployment Rate (%)	4.7	4.9	4.5	4.7	5.6

*Source: Brunei Darussalam Key Indicators 2001, 2002 Department of Economic Planning and Development, Prime Minister's Office.*

Brunei's unemployment situation is caused by different factors and is a mixture of frictional, structural and cyclical unemployment. Frictional unemployment materializes when the process of matching job seekers to available job vacancies is sluggish. Structural unemployment appears when there is a mismatch between the skills required for employment and the skills of the unemployed population. These skills mismatch results in the job-seekers being unable to fill the job opportunities available in the market.

The final cyclical unemployment situation is otherwise known as demand-deficiency unemployment. This occurs when there are simply not enough goods and services to provide employment for the job seekers. Most

economists regard both frictional and structural unemployment as being unavoidable thus this situation makes up the economy's natural rate of unemployment.

In Brunei's case, the jobseekers that make up the frictional unemployed population comprises youths, school-leavers and diploma holders, and university graduates. This is a very serious cause for concern in Brunei as it sees an annual rise in the number of graduates from both international and local institutions. They face a difficult challenge in securing their first jobs when they enter the job market and face prolonged unemployment because the small private sector largely made up of SMEs are unable to generate the large number of job opportunities to absorb the local job seekers.

It is also ironic that despite the high number of locals unemployed, the private sector continues to hire foreign labour. National statistics from the Department of Economic Planning and Development (DEPD) show that in 2001 the number of foreign workers in the whole private sector population was 71,844 (Table 6). The whole private sector worker population is only 98,372 and thus a massive 73% is foreign sourced. The ratio of local workers to foreign workers is an unfavourable 1:2.7 persons.

Brunei's small population also translates into a shortage of both skilled and unskilled workers. For example, in 2001, 89% (24,619) of the construction industry work force are foreign. In the manufacturing industry, the foreign labour component is similarly high at 86% (13,983) of the whole manufacturing workforce population (Table 6). Despite the availability of jobs which may be filled by local job seekers within the private sector industries, it is more often than not that these positions are offered to foreign workers.

**Table 6: Distribution of Employment in the Private Sector in 2001**

<b>Industry</b>	<b>Total Employees</b>	<b>Citizens &amp; Permanent Residents</b>	<b>Temporary Resident</b>
Agriculture, Forestry and Fishing	3,942	977	2,905
Production of Oil and Gas	3,701	3,041	660
Saw milling and Timber Processing	628	113	515
Mining, Quarrying and Manufacturing	16,304	2,321	13,983
Construction	27,597	2,978	24,619
Wholesale & Retail Trade	16,537	5,057	11,480
Coffeeshop, Restaurants and Hotels	8,404	2,397	6,007
Transport, Storage & Communications	5,232	2,505	2,727
Financial, Insurance & Business Service	6,522	3,751	2,771
Community, Social & Personal Services	9,505	3,328	6,177
All Industries	98,372	26,528	71,844

*Source: Brunei Darussalam Key Indicators 2001, 2002 Department of Economic Planning and Development, Prime Minister's Office.*

Brunei's unemployment condition is caused by a myriad of factors. It has been argued that the private sector itself is responsible and that employers are not receptive to hiring locals. The private sector is seen as viewing the locals as being choosy and also lacking the appropriate and necessary skills for effective employment.

Another argument which has been suggested is related to the no-committal attitude of the local workers themselves whereby their private sector employment is viewed as a temporary and non-permanent situation. They still see the government as being the ultimate and best employer as the paternalistic government offers a wide range of welfare benefits which is far superior to those offered at private sector level.

Another argument which has been proposed relates to the cost factor of hiring non-locals. The private sector perceived these foreign workers to be better

value for money as they are supposedly more productive and cheaper to hire. However, many private sector employers have to provide housing for their employees and also transportation costs from employee houses to the workplace. This assumption of cost efficiency of foreign sourcing is thus debatable. The above views have not been fully researched and remain potential but likely causes to the employment problem which is plaguing this country.

Overall, there has been an increase of locals working in the private sector. From 1991 to 2000, a rise in local participation of 63% was noted from 9,079 in 1991 to 23,535 in 2000. As more graduates and school leavers are produced each year, this trend is set to rise in the foreseeable future as the government increases its effort to induce more local participation in this weak and fragile private sector.

## **2.8 National Philosophy: 'Melayu Islam Beraja' (Malay Islamic Monarchy Philosophy)**

The national and official philosophy of life in Brunei is known as the 'Melayu Islam Beraja' (MIB) or the 'Malay Islamic Monarchy' concept. This philosophy of life has been the backbone of Bruneian society since the reign of its first Bruneian Malay Moslem Monarch, Sultan Muhammad 1 in 1363. However, it was only in 1984, under the reign of the present 29<sup>th</sup> Sultan of Brunei, Sultan Hassanal Bolkiah that this concept was firmly established as a national philosophy.

His Highness decreed on Brunei's First Independence Day, 1<sup>st</sup> January 1984, that "Negara Brunei Darussalam with Allah's gracious will, shall forever be an independent and democratic Malay, Islamic Monarchy, based on the teachings of Islam according to Sunnah Wal-Jemaah and which will be governed in fairness, trust and freedom."

His Highness stressed that "the interpretation of MIB is that Brunei Darussalam is a Malay Islamic nation with a Sultan. This state of affairs does

not exist with our effort but it is the will of Allah. We cannot ask why, but we have to be grateful and at the same time do something to maintain its survival and resilience." (1<sup>st</sup> October 1990).

Tuah (2002) interprets this concept as 'a national unifying concept encompassing the Malay language, culture and traditions, the teachings, values and laws of Islam; and the Monarchical system of administration; which should be respected or practised by all parties (citizens or non-citizens) residing in Brunei regardless of their different cultural background.'

In summary, this grounding philosophy of this concept is that all principles and values of the Islamic faith as decreed in the Holy Quran and Al-Hadis (practices and sayings of Prophet Muhammad Peace Be Upon Him) shall forever be the cornerstone of all activities which concerns the Malay race, culture and language and that the Sultan as a monarchical institution is the ruler and administration of this sultanate. These three components are inseparable and become institutionalised symbols of Bruneian life.

It has been likened to a cell whereby the nucleus, which is the life source of the cell is the Islamic faith. The cytoplasm of the cell is the Malay component of this concept. It requires the Malay race and culture to give the cell a firm shape and identity. The cytoplasm is nourished by the nucleus. The monarchy is the surrounding protective cell wall. It is the sheltering interface between the internal cell structures to the outside elements. It guards the Malay race from negative external forces and also shields the Islamic faith from being debased by modern influences. Without one, the other components will not survive. They are all intertwined and important. However, Islam is regarded as the most important institution followed by the Monarchy and lastly the Malay element.

It must also be mentioned that Indonesia and Malaysia both have similar national concepts. Both nations are located in the South-east Asian region and are Muslim countries. Indonesia, a republic, has the 'Pancasila' concept which is the belief in one god, national unity, democracy, social justice and



disciplined humanity. The Malaysian Malay population is the majority population but does not make up two-thirds of the population. The Malay language is also Malaysia's official language which is used as a unification tool for the population. The Malay language is also used in the national integration policies of the Malaysian government. The Malaysian concept is 'Rukunegara' which means 'way of the country'. Here the ideal Malaysian, irrespective of racial origin is loyal to the king and country and believes in God. Both 'Pancasila' and 'Rukunegara' are useful tools for national unification.

As mentioned earlier, this philosophy has been assimilated into Bruneian life including the management and administration of the nation. The government itself has continually reinforced this concept through numerous nation-wide programmes which aim to assimilate the values (both physical and spiritual) of this philosophy into the managerial and administrative mindsets of the Bruneian people. To further understand the importance of this concept, an examination of the three institutionalised elements is necessary beginning with the most important component, the Islamic faith.

Islam as an institution was propagated and developed on the basis of the Holy Quran and was reinforced by the authentic sayings and practices (Al-Hadis) of Prophet Muhammad. The 1959 Constitution stipulates that the official national religion is Islam and that the Sultan is the head of religion (Section 3(1) and Section 3(2) respectively). It also states that only a Muslim can hold top administrative positions in the government. Furthermore Islam states that the highest ranking post such as a monarch, can only be held by a Muslim male. This makes the administrative system very patriarchal because it is very male-dominated.

The managers and administrators of the government have a duty and a responsibility to plan and implement according to the teachings as advocated in Islam. As such, a government body to monitor and enforce an Islamic consciousness was formed under the Ministry of Religious Affairs. Tuah (2002) states that this ministry was formed to 'implement the teachings,

values and if the need arise, the laws of Islam in Brunei. All issues and problems related to moral, culture, commerce and administration are referred to this agency and would be implemented by the interested parties after being verified through fatwa or rulings issued by Majlis Ugama Islam (Islamic Religious Council).

To illustrate the extent of the importance of this institution in governmental activities, an excellent example is the recitation of the 'doa' (prayers). This prayer is recited because Muslims believe that it is necessary to gain the blessings of God prior to starting any activity or project. Every government proceeding and end to an activity or project involve the recitation of the doa (e.g. during construction of a building, conference, seminars, meetings and so forth). Another example is the structure of the working week in the public sector whereby Fridays and Sundays are public holidays. The former are designated as public holidays to honour the Muslim holy day when nationwide Friday prayers in the early afternoon are held.

Although this element is important in Bruneian society, it must be stressed that Brunei Darussalam has adopted a mid-stream view about Islam. It is not interested in becoming a secular state and also condemns fundamentalist Islamic views.

The second institution is the Monarchy. Here, the nation is governed by the hereditary ruler who accepts advice from the Council of Ministers, the Privy Council and the Islamic Religious Council on matter arising from the administration and management of this country. As stipulated in the 1959 Constitution, His Majesty the Sultan and Yang Di-Pertuan is effectively the supreme executive authority of Brunei Darussalam. As chief executor of this nation all policies, laws and regulations for every ministry must be referred to the monarch for royal assent. The ruler also has legitimate constitutional power to veto any changes or to implement changes as and when necessary.

In 1988, His Highness presented an outline of administration and management to be implemented and followed. These included the following:

strong work ethics based on honesty, efficiency, affectivity, trustworthiness and cleanliness; increasing public sector work quality; thriftiness in government expenditure and maintenance; problem solving of any public grievance or complaints; courtesy in work performance; and finally, important information dissemination to the public to prevent conflict, confusion and resentment.

The Sultan is respected and obeyed not only in his capacity as supreme executive authority but also as the head of religion. He is a highly respected monarch who is firm in his willingness to adhere to the tenets of Islam for the rule and administration of this country.

The third and final institution is the Malay dimension. This is not only a matter of the culture, language, race and traditional values of the Malay but also extends to the writing of the Malay language. The Malay language is the official tool for administrative and managerial issues as stipulated in section 82(3) of the 1959 Constitution. The Islamic Malay identity is visible in the Jawi (Arabic) script of the Malay language in government administration and management.

The true Malay identity consists of seven sub-races: the Brunei Malays, Kedayans, Tuotngs, Dusuns, Belaits, Muruts and Bisayas. Each has its own specific cultural identities. The Brunei-Malay and the Kedayans are Muslims and share similar dialects. These two sub-races have historically influenced the socio-political life and society in Brunei for many centuries. The Kedayans and Tutongs are also Muslim. Most of the Muruts, Dusuns and Bisayas are non-Muslims. Being a majority race which has the highest number of Muslims, Brunei was thus able to implement and uphold the MIB concept.

These sub-races also respect traditional values. For example, they are religiously inclined and obedient to their faith (Islam), the Sultan, and the country; they also preserve their cultural traditions, dress and behaviour. Even the non-Muslims respect Islam.

The MIB concept has been actively implemented in all aspects of governance in Brunei. There are seven government agencies which have been entrusted to implement the MIB philosophy. These are the Prime Minister's Department, the Dewan Bahasa and Pustaka (Language and Literature Bureau), Ministry of Religious Affairs, the Information Department, the Ministry of Education, the Radio and Television Department and the Adat Istiadat (Custom and Traditions) Department.

Economic planning and development has occurred around these MIB tenets. The administration and management processes in Brunei are currently being steered towards achieving social justice and also towards an Islamic perspective. In recent years, more royal decrees have been made which has given rise to increasing participation from religious leaders in the developmental impetus. This is also applicable in the government drive to promote its tourism industry.

## **2.9 Overview of the Evolution of Tourism Policy and Management in Brunei**

It is an accepted fact that tourism in the past has not been seen as a viable industry in Brunei. Since 1984, when Brunei gained its independence from being a British protectorate state, it has progressed through three five-year national development plans and it is currently on its eight national development plan. Tourism was not mentioned in the Fifth NDP (1986-1990) however was mentioned very briefly in the Sixth NDP (1991-1996). It was only in the Seventh NDP (1996-2000) that tourism was specifically mentioned as an industry for economic diversification. This marked a turning point for the previously neglected sector because it had finally received official endorsement and support from the government and could look forward to future development.

The official tourism body in Brunei has gone through several changes. It was first established in 1982 as a Tourism Section (TS) under the Brunei Economic Development Board under the Ministry of Finance. From 1982 to

1987, the role of the TS was very passive because there was not much emphasis into developing this industry. The TS's role as the National Tourism Organisation (NTO) from 1987 to April 1994 was more active with its roles limited to the processing and issuance of travel agent licences and the supervision of tour operators in Brunei.

It aimed to create awareness of Brunei as a single product using the marketing funds allocated under the Funding Scheme of the Brunei Economic Development Board (BEDB) but failed to create the necessary impact. Their target market then was overseas students who were interested in undertaking ecological research activities in Brunei, the elderly pensioners as well as business travellers. These groups were targeted because of Brunei's rich natural environmental reserves, the placid and slow lifestyle which the elderly group would find relaxing and the existing conference facilities for the business travellers.

Their objective was to aim to develop tourism so that it would directly benefit the communities through an enhancement of their quality of life. The monetary and economic aims of increasing foreign exchange into the country and job creation for the locals was relegated to secondary importance. With regards to the pricing of tourism products in Brunei, this activity was left to the country's travel agents and tour operators to price according to market prices. It is not known if the price discrimination then was considered competitive compared to today's prices.

At this point in time, the TS's organisational structure was very simple because it only had seven members of staff, of which only four were tourism officers. The section was subdivided into two functions: marketing and research development. Needless to say, it did not have much power.

The TS roles and objectives in 1994 to 1995 were still the same. However, their target markets had been revised considerably. The market segmentation resulted in plans to gain the more affluent tourists, the more socially and

culturally aware tourists (those who would not endanger Brunei's fragile values, traditions and culture) and longer stay tourists.

This shift in marketing arose due to a deliberate move to position Brunei as a destination with rich historical heritage, ecological treasures, as a hub for ASEAN travel and also as a safe business haven due to its stable political and economic context. In 1994, Brunei joined the Brunei Darussalam-Indonesia-Malaysia-Phillipines- East Asean Growth Area (BIMP-EAGA) and this was also a contributory factor changing the tourism strategy for Brunei. It was hoped that through the integration of Brunei into this growth area, it would benefit from tourist arrivals from this country via proposed regional cooperation.

However, the TS's progress in developing tourism was still minimal and was impeded because it was under the responsibility of the Ministry of Finance (MF). It had very little power to implement its projects much less have a clear decision-making mechanism which was not under the responsibility of the ministry. The marketing function was ineffective because of budgetary constraints and more importantly, it lacked a comprehensive tourism strategy or master planning. The research and development function was however operational.

A pivotal point occurred in 1995 when this small section was transferred to a more appropriate ministry, the Ministry of Industries and Primary Resources (MIPR). This ministry served to facilitate, promote and nurture economic diversification of industries which will aid in creating a more vibrant economy for Brunei. A new division was established incorporating two units, namely the Industrial Promotion Unit (IPU) and the Tourism Development Unit (TDU).

The newly established Brunei Tourism Development Unit (BTDU) was restructured to incorporate different functions which served different objectives. The Director General is the organisational leader of this unit. The second in command is the post of Acting Head. This position is rotated every two months amongst the tourism officers of the unit. The Acting Head is in

charge of the three sub-units namely the planning and development, marketing and promotion and finally coordination and services. The marketing and promotion sub-unit is served by two assistant officers. The unit has three clerks to assist in its daily operations.

The BTDU was still small and still had limited powers and objectives. It had two added functions which brought it closer to fulfilling its role as the NTO for Brunei. The first was to act as the coordinating agency for tourism activities in Brunei. The second supplementary function was to implement tourism policies and other related activities in Brunei. Meanwhile, its objectives had also changed considerably. The previous secondary objectives of gaining foreign exchange revenue and as a local employment generator became the top priority. Concurrently, marketing activities designed to create awareness of Brunei as a desirable holiday destination to the family group (mother, father and two children) and the mature group (age 30 to 50 years) was set as the objective. It still lacked the essential tourism strategy which would serve to guide the development of this industry for years to come.

Realising that previous tourism developmental efforts have lacked continuity of success and implementation, the Unit commissioned external consultants to prepare a Tourism Masterplan for Brunei. This was completed in November 1998 with heavy involvement of the Unit's resources.

## **2.10 Overview of the Brunei Tourism Masterplan 1998**

It was reported in the media that in the tourism planning processes, both religious and government leaders have been heavily involved in the planning stages to ensure that the 'MIB' concept is implemented and upheld in this particular push to achieve economic diversification. The tourism development Masterplan for Brunei reflects the approach of aiming for sustainable development in specialist, niche tourism market segments, which is developed in a very controlled manner. The plan is the blueprint to realise the vision of 'Brunei Darussalam as a unique tourist destination and gateway to tourism excellence in South East Asia'.

The Masterplan has several key objectives as established by the MIPR, which are:

1. To enhance international awareness of Brunei Darussalam;
2. To create an image for Brunei Darussalam as a holiday destination;
3. To maximise foreign exchange earnings and increase the contribution of GDP;
4. To create employment opportunities.

Formulation of the Masterplan was dictated by two guiding principles. The first is that tourism development must be carefully planned and controlled. This is to minimise and limit any socio-cultural impacts of tourism on Brunei's predominantly Muslim community and to preserve its cultural and religious heritage; and yet, must also yield the desired socio-economic effects. The second principle states that tourism planning must be used as a tool to conserve Brunei's cultural heritage and natural environment.

The Masterplan is comprehensive because it was prepared by professionals who are well versed in this industry. The plan analyses the tourism potential for Brunei and provides comprehensive recommendations for this tiny sultanate in all aspects of tourism. Both international and domestic tourism was considered in this plan but the impetus is to attract more international tourists. The existing tourism mix i.e. all existing infrastructure, tourist attractions, services and facilities are described and evaluated. This plan also highlights key issues and determinants in tourism. It examines economic, socio-cultural and environmental considerations to tourism development in Brunei. Various tourism products and packages, changes to tourism organisation and marketing activities were specified for tourism development in Brunei. Most importantly, the plan provided an implementation programme that entails a specific time frame and targets for implementation of the Tourism Masterplan.

The plan states that under current circumstances, Brunei has the resources to potentially offer four types of tourism products that caters to the 'special interests' tourism niche market. These products may be broadly categorised



as cultural/ Royalty tourism; eco-tourism and adventure tourism; theme-park tourism at Jerudong Park; and cruises.

Out of these four categories, only two have been selected as viable in the short-term leading up to 'Visit Brunei Year 2001'. These are cultural/Royalty and eco-tourism and adventure tourism. Selection was based on the premise that although both theme park and cruise tourism are offered in Brunei, considerably more resources will be necessary to develop these attractions further to reach international standards. The other two products are further along the product-life cycle and are already fairly developed. The focus here will be more towards product improvement.

The cultural/ Royalty tourism product is based on providing a package, which will highlight the cultural (art, music, history or religion) and royal elements in the products. Brunei Malay culture and heritage has some similarities to its Malaysian Malay counterpart, although it does have some unique peculiarities, which may be highlighted. The Kampung Ayer, the world's largest water village is a source of uniqueness in that it has been for many centuries, the traditional dwelling area for Bruneians. Thus, selling the Brunei Malay product will be based on providing tourist attractions at Kampung Ayer in a traditional Malay cultural village setting.

Royalty tourism is also a viable segment. The United Kingdom has a strong royal heritage, which is itself a tourist attraction. The very successful Buckingham Palace tours in London, is an example, which may be emulated in Brunei's Royal Palace itself. This will take the sightseeing trip around Brunei further in that now tourists may be able to enter palace grounds.

Eco-tourism and adventure tourism is already an important source of tourism income in Brunei. This activity is centred at two eco-tourism zones: the Ulu Temburong National Park (UTNP) and Kuala Belalong. In the foreseeable future, with further eco-tourism development at Batang Duri, Brunei is set to capture more of the eco-tourist market segment. Previously, Brunei was marketed as the 'Emerald of the East' to illustrate its lush rainforests and vast

ecosystem. This tropical heaven experience has its own accommodation, which offers adventure-based activities such as 'Outward Bound'.

The plan states that in order to support the development of these types of tourism, the tourism product itself must be improved. Product improvement must therefore be aimed at increasing the choice and quality of accommodation; provision of local-made high-quality handicrafts; improved sports facilities; speciality shopping; and adequately certified safe modes of transportation.

Higher local input from the Arts and Crafts Centre in Brunei is strongly recommended to fill the supply gap in the tourist souvenir market. Brunei was host to the SEA Games in August 1999. In the process, the country developed its sports facilities to international standards. Speciality shopping however remains under-developed.

The plan makes recommendations for transportation, noting that air access to and outside the country is already good. However, bus services are still irregular and rail access is non-existent. Improvements are underway to standardise the current unregulated transportation industry with safety rules and regulations imposed on taxis, rental cars, boats and coaches. Stringent rules and penalties have been devised, for example includes the provision of safety floats for passengers on 'flying coffin' boats, a traditional means of transportation in the Water Village. Boat operators failing to do so will have their licenses removed. The Trans Borneo Highway, the national airlines carrier (Royal Brunei Airlines) as well as sea-transportation are also being improved.

Brunei is a very small country and thus there are major constraints to promoting domestic tourism. Potential revenue derived from domestic tourism is not perceived to be as lucrative as international tourism thus the former appears to be of secondary importance in Brunei's case. The emphasis is to market Brunei as a hub to Borneo. The tourism board has realised that Brunei is not adequately visible in the tourism market and has opted to work with its

other Malaysian neighbours. Brunei Darussalam is not to compete with others, but to complement and add value to the region as a single destination. The 'Borneo package' has been a tourism product for a few years and Brunei features as a one-night stopover tour in the product.

The Masterplan stated that a market analysis had been carried out to provide details of tourists' demographics. Most arrivals fall into the 'Visiting Friends and Relatives' (VFR) category, a market segment, which does not have high expenditure patterns as opposed to other travellers. Tourism statistics in 1997 showed that most of the incoming visitors came from neighbouring countries. Malaysian arrivals dominated with approximately 80% of total arrivals. The plan states that for tourism to be economically viable, other international markets must be actively pursued and captured. Current tourism source markets as well as potential markets were identified. The target markets are families and ecotourists from the following countries: Germany, Australia, United Kingdom, Taiwan, China and Malaysia. These countries are those into which RBA flies into. This signifies that the strategy has indirectly limited the scope of tourists from other countries that is not served by RBA.

The total target market is one million tourists' arrivals by the year 2001, the year designated as 'Visit Brunei Year'. The promotion and advertising for VBY 2001 is focused around the theme, 'The Kingdom of Unexpected Treasures'. The advertising and promotion campaign by BTDU has been limited in the past. The budget for promotional activities is only a B\$5 million for the period 1999- 2001.

This is meagre when compared to the budgets of S\$30 million held by the Singapore Tourism Board and RM\$20 million by its Malaysia counterpart. The plan recommends more aggressive marketing endeavours in international markets; some of which have already been completed. For example, the BTDU recently launched its website of VBY 2001 and was an exhibitor at the WTM in London. Such campaigns have mostly been funded by the state. This strategy has lead to closer integration between BTDU with the tour operators and travel agents, hotels and Royal Brunei Airlines, the national carrier.

In the analysis of key tourism development issues in Brunei, five major obstacles were mentioned. These are: the inadequate current organisation of tourism; lack of co-operation and co-ordination between government institutions; an unfavourable investment climate; insufficient local labour participation and regional communication issues.

- The inadequate current organisation of tourism

Both the organisation of tourism and the tourism industry are in their infancy. The BTDU itself lacks sufficient professional manpower (15 tourism officers only) and resources to carry out its diverse activities and responsibilities. These include: planning and co-ordination, marketing and promotion, and administration. The problem is exacerbated because of weak private sector involvement in tourism that tends to rely on direction from the BTDU. The plan strongly suggests greater public-private sector links are needed if controlled sustainable tourism development is to occur. The plan aims to provide a platform in which tourism practitioners and planners may work towards achieving balanced and coordinated growth.

- Lack of co-operation and co-ordination between government institutions

In Brunei's case, its economic management is perhaps less structured. Under present arrangements, there are at least five ministries that have a direct impact on economic policymaking and implementation. There is no one clear leading ministry, which can shoulder the responsibility of economic policy-making. Due to the lack of coordination, at times this has lead to overlapping responsibilities, which in turn has lead to replication of services and thus contributing towards doubling the costs. This has unfortunately affected tourism development in Brunei. All ministries are effectively involved with tourism development.

It is apparent that there is a need to establish the one government body, which can act as the machinery to strengthen economic policy coordination and

implementation. This will result in quicker policy responses and greater coherence in government economic policymaking and implementation that will improve government efficiency and hence restore business confidence. The Masterplan proposes the formation of a separate, fully autonomous government agency that is committed to developing tourism that has access to its own resources to implement its objectives.

- An unfavourable investment climate

There is a lack of interest by foreign investors in developing tourism in Brunei in this present climate. There are several reasons for this. First and foremost, the perception that Brunei, as a tourist spot is limited. Secondly, there are still the lingering after-effects of the Asian Financial Crisis from 1997, which have kept most investors away. The final reason may be due to the collapse of Amadeo Corporation, a multinational firm headed by Prince Jefri, which has sends mixed signals about the health of investment in Brunei.

Tourism development financing requires major restructuring in Brunei. The growth of urban infrastructure and hotel construction was made possible by using financial resources from the government and financial institutions. These investments encouraged the diversification of tourism offerings in such ventures as national parks. The plan recognises that though financing is available, present investment incentives are not attractive to foreigner investors. The issue of tourism-related legislation must also be resolved for investors to come to Brunei.

The national fund for tourism development is currently under the Ministry of Finance, which limits the speed of growth in this industry. Funding from the weak private sector is almost negligible as there are no formal taxing systems (e.g. hotel taxes) that can contribute towards a tourism fund. The government does not have a specific fund for tourism businesses. Rather it has a state fund for all categories of SMEs. This is provided by Semaun Holdings that also provides the financial resources and technical assistance to small and medium-size companies; it is also a department under the MIRP.

- Insufficient local labour participation

Most Bruneians prefer to be in the public sector where the pay and fringe benefit are always higher. In the private service sector, labour participation in Brunei is mostly occupied by overseas workers. Hence, there is a lack of suitable skills and experience of locals working in the industry. The tourism industry also has a bad image in Brunei because of the negative effects it has had in other Asian countries. Working in the industry is seen as undesirable.

- Regional communication issues.

The plan states that Brunei is at a disadvantage to position itself as a hub to the region because of the small number of direct international links to Brunei; limited capability of Royal Brunei Airlines to expand its network; and, lack of infrastructure (e.g. there is no airport hotel). The plan proposes an approach to investment initiatives, which could deliver a range of services to compliment a hub airport.

The plan advocates that a zoning strategy is devised that would assist in facilitating and controlling tourism development in Brunei. Each zone is to have its own product component i.e. tourism activity, accommodation, facilities, services, regulations, and target markets. Four zones have been selected for tourism development in Brunei namely: Muara, Kampung Ayer, Jerudong and Batang Duri. These were selected based on accessibility, nature of existing tourist product, level and quality of natural environment, incorporation within existing Local Plans and the likelihood of private sector involvement.

The plan also presents an approach to implementation of its recommendations. This action plan prioritises important tasks, approximates costs and indicates respective agents. The phasing of the implementation plan has been divided onto three stages: Phase 1 which is related to immediate issues until 1999; Phase 2 which is the short-term strategy covering the period 2000-2001; and finally, Phase 3, the long-term strategy from 2002 to 2003.

## **2.11 The Current Tourism Context and Trends in Brunei**

It is essential that the current tourism context and trends in Brunei are analysed to gain a greater understanding of the objective of the research. The analysis will entail an overview of the tourism facilities and infrastructure available in Brunei, a presentation of relevant tourism related statistics which has been sourced from various agencies such as the Labour Department, and the Immigration and National Registration Department in the Ministry of Home Affairs, the Department of Economic Planning and Development in the Prime Minister's Office; and, a brief presentation of the socio-economic characteristics of tourists in Brunei.

### **2.11.1 An Analysis of the Current Tourism Trends in Brunei.**

Tourism development in Brunei gained momentum because of the potential for its growth and viability in this small nation as a means of diversification from the oil and gas industry. It was also accelerated by government's initiative to develop Brunei as a prime hub in the region and as a gateway to Borneo and its other close neighbours namely Malaysia, Indonesia and the Philippines based on a collective regional agreement for mutual cooperation within these countries. This association is known as the Brunei-Indonesia-Malaysia-Philippines East ASEAN Growth Area (BIMP-EAGA). The 'Service Hub for Trade and Tourism 2003' ('SHuTT') government initiative was spearheaded and initiated by the Ministry of Communication to develop this small nation into a regional service hub for the trade and tourism industry.

With regards to annual arrivals into Brunei by the air, sea and land (Table 7), the statistics indicate that there was an upward trend in arrivals until 1999 when it decreased by almost 6% from the previous year. In 2000, the number of arrivals resumed to 1998 levels but yet again dropped similarly as in 1999. It must be noted that the arrival population is divided into three groups: the number of returning residents (locals and permanent residents), intending residents (for employment purposes) and other arrivals. Those classified as 'other arrivals' are also classified as visitors which comprise of five sub-

categories namely tourists, business, relations, transit and others. The arrivals by air also fluctuated over the years and dropped from a high of 24.6% to 14.5% in 2001, the official year for Brunei tourism. Several factors may account for this rate. First, it may have been more expensive to travel by air into Brunei due to higher air fares. This is quite unfortunate because it appears to show that the national airline, Royal Brunei Airline (RBA), did not have a good year in terms of airline passengers.

**Table 7: Arrivals By Air, Sea and Land (Percentage Distribution)**

<b>Year</b>	<b><u>Total</u></b>	<b><u>%</u></b>	<b><u>Air</u></b>	<b><u>%</u></b>	<b><u>Sea</u></b>	<b><u>%</u></b>	<b><u>Land</u></b>	<b><u>%</u></b>
1991	931,234	100	229,165	24.6	263,986	28.4	438,038	47.0
1992	1,156,992	100	253,140	21.9	278,588	24.1	625,264	54.0
1993	1,278,854	100	280,676	21.9	313,618	24.5	684,560	53.5
1994	1,652,887	100	322,488	19.5	300,222	18.2	1,030,177	62.3
1995	1,664,088	100	339,140	20.4	238,222	14.3	1,086,726	65.3
1996	1,675,294	100	355,792	21.2	176,228	10.5	1,143,274	68.2
1997	1,748,841	100	387,335	22.2	135,986	7.8	1,225,250	70.0
1998	2,121,612	100	365,649	17.2	123,859	5.8	1,632,104	76.9
1999	1,997,227	100	340,793	17.1	147,570	7.4	1,508,864	75.5
2000	2,118,250	100	326,067	15.4	133,544	6.3	1,658,639	78.3
2001	1,982,297	100	288,308	14.5	117,422	5.9	1,576,567	79.6
2002*	1,185,865	100	225,965	19.1	78453	6.6	881,447	74.3

*\* From January to August 2002 only*

*Source: Immigration and National Registration Department, Ministry of Home Affairs*

The low air passenger load for 2001, which may be seen from Table 7, is quite disappointing; it is the second lowest number of air arrivals within the decade. It is very likely that the 14.5% air arrivals were not solely made on RBA but on other more competitively priced airlines. One can assume that the national airlines had failed to corner the market for inward bound journeys to Brunei for



the tourism launch of VBY and had thus failed to use this window of opportunity.

The second reason may be due to improved land roads which makes it easier and cheaper for people to cross Brunei as indicated in the table by a high of 79.6% in land arrivals in the same year. However from 1995 to 1997, it did show an increase from 20.4% to 22.2%. Similarly, there has been a significant downward trend of 22.6% in sea arrivals from a high of 28.4% in 1991 to 5.8% in 1998. The proportion of sea arrivals has not improved much from 1998 to 2002. Rather it decreased again to a second all time low of 5.9% in 2001 within the decade. This again indicates that people opt to enter Brunei via land.

The significant increase in land arrivals from 47.0% to a peak of 79.6% in 2001 is an increase of 32.6% over the decade. This is due to a major factor: improved trans-Borneo road links between Brunei and the eastern Malaysian state of Sarawak. During 1997 to 2000, the high land arrivals from 70% to a decade high of 79.6% in 2001 corresponds to an increase in visitor arrivals whereby people whose purpose of entry into Brunei fell in the 'others' category followed by 'relations' (visiting friends and family). From 1998, 1999 to 2000, the total number of such visitors categorised as 'others' was 45%, 45.5% and 42.7% respectively of the total arrivals into Brunei (Table 9).

The recently opened new points of embarkation in Brunei at Kuala Lurah and Sungai Tujuh are the main channels of trans-border crossing. Both points connect to the Malaysian eastern state of Sarawak. It is widely believed that the high level of land arrivals is a result of people who enter the country by using low cost transport (car or bus) in order to visit relatives, family and friends on a daily or weekend basis as well as to conduct business.

**Table 8: Arrivals by Purpose of Visit (Percentage Distribution)**

Year	Total Arrivals		Returning Residents		Intending Residents		Visitor Arrivals	
	No.	%	No.		No.		No.	%
1988	926,023	100	451,703	48.78	16,910	1.83	457,410	49.40
1989	946,377	100	539,205	56.98	14,421	1.52	392,751	41.50
1990	931,176	100	541,001	58.10	13,539	1.45	376,636	40.45
1991	931,234	100	555,978	59.70	31,312	3.36	343,944	36.93
1992	1,156,992	100	696,913	60.23	48,203	4.17	411,876	35.60
1993	1,278,854	100	732,229	57.26	57,716	4.51	488,909	38.23
1994	1,652,883	100	955,138	57.79	75,391	4.56	622,354	37.65
1995	1,664,088	100	874,878*	52.57	-	-	789,210	47.43
1996	1,675,294	100	814,393*	48.61	-	-	860,901	51.39
1997	1,748,841	100	891,221*	50.96	-	-	857,620	49.04
1998	2,121,612	100	811,119*	38.23	-	-	1,310,493	61.77
1999	1,997,227	100	697,211*	34.91	-	-	1,300,016	65.09
2000	2,118,250	100	811,486*	38.31	-	-	1,306,764	61.69

*Source: Immigration and National Registration Department, Ministry of Home Affairs*

Most of these people travel from Miri and Limbang, two developed Malaysian towns which are located closest to Brunei. The Kuala Lurah checkpoint is the connection between Brunei and Limbang, another Sarawak town.

Overall, the number of total arrivals increased from 926,023 to 2,118,250 in 1988 and 2000 respectively (Table 8). From 1989, this was dominated by returning residents until 1995. It was in this year that the Immigration Department decided to compile the statistics together for both returning and intending residents. However, in 1996, 1998 to 2000, the number of visitor arrivals outnumbered the returning residents and reached a peaked of 61.69% in 2000.

To see the true picture of tourists' arrivals into the country, it is necessary to refer to the total visitor arrivals. As aforementioned, those classified as 'other arrivals' are also classified as visitors which comprise five sub-categories namely tourists, business, relations, transit and others.

As illustrated in Table 9, it was found that the total number of visitors had increased from 457,410 in 1988 to 1,306,764 in 2000. Most visitors arrived in this country under the 'others' category for most of the years except from 1991 to 1994. During the years 1991 to 1994, the highest ranking number of visitors recorded was in Brunei to visit their 'relations'.

The trend in tourists' arrivals has fluctuated over the years from a low of 1.97 % in 1988 to a high of 9.33 % in 1994. This coincided with the opening of the world's first and only free theme park, Jerudong Park Playground, in Brunei to commemorate the Sultan's 48<sup>th</sup> Birthday. Tourists' arrivals however sharply decreased by almost 5% in the following year. A rise to 6.45% was reached in 1996 but almost halved to 3.84% in 1997. This slump in tourists' arrivals until 1999 is probably caused by the effect of the haze caused by the global El-Nino effect that drove tourists away from the region.

**Table 9: Arrivals by Purpose of Entry of Visitors into Brunei (Percentage Distribution)**

Year	Visitors											
	Total Visitor Arrivals		Tourists		Business		Relations		Transit		Others	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1988	457,410	100	9017	1.97	38,612	8.44	41,891	9.16	33,111	7.24	334,779	73.19
1989	392,751	100	8549	2.18	43,882	11.17	38,531	9.81	21,837	5.56	279,952	71.28
1990	376,636	100	8010	2.13	43,849	11.64	36,261	9.63	24,026	6.38	264,490	70.22
1991	343,944	100	28,640	8.33	64,151	18.65	133,552	38.83	39,625	11.52	77,976	22.67
1992	411,876	100	38,035	9.24	79,023	19.19	159,867	38.81	38,522	9.35	96,429	23.41
1993	488,909	100	44,921	9.19	85,225	17.43	181,794	37.18	40,754	8.34	136,215	27.86
1994	622,354	100	58,090	9.33	93,670	15.05	224,140	36.01	53,402	8.58	193,052	31.02
1995	789,210	100	36,751	4.66	48,602	11.27	230,436	29.20	25,398	3.21	448,023	56.77
1996	860,901	100	55,497	6.45	43,691	6.16	250,139	29.06	20,782	2.41	490,792	57.01
1997	857,620	100	32,933	3.84	27,480	3.20	240,731	28.07	43,819	5.11	512,657	59.78
1998	1,310,493	100	32,738	2.50	34,372	2.62	228,684	17.45	66,361	5.06	948,338	72.37
1999	1,300,016	100	38,440	2.96	29,997	2.31	247,034	19.00	75,756	5.82	908,788	69.91
2000	1,306,764	100	41,241	3.16	27,303	2.09	258,836	19.81	75,381	5.77	904,003	69.18

*Source: Immigration and National Registration Department, Ministry of Home Affairs*

Those who arrived on business also showed a fluctuating trend over the years but have constantly been more in numbers than incoming tourists. This is true apart from in 1996 and 1997. The affects of the haze as a potential health hazard had also decreased business travel into the country and into the region as a whole.

The peak in the high numbers of business visitors into the country in the early to mid 1990s indicated a better business environment because of the interest generated by the a series of multi-billion contracts and developments under the now bankrupt Amadeo Corporation. This helped to create a false bubble economy in Brunei which collapsed in the ensuing Asian financial crisis that started in 1997 which severely rocked the region's economies.

As mentioned earlier, the second highest-ranking category for visitor arrivals are those who entered to visit their relatives. Those in 'transit' have constantly been higher than tourists' numbers and this presents a potential segment for tourism. These short stay transit passengers may be encouraged to tour Brunei for a few hours whilst they wait for their connecting flights. This is a viable segment which may be exploited for tourism development and should be prioritised for growth.

Those who arrive in the 'others' category, total 904,003 persons in 2000. This category is further sub-categorised into six: namely employment, conference, student, official visit, dependents and others. The figures for this category of arrivals have constantly been the highest over the years.

Table 10 is a compilation of arrivals by nationality and purpose in 2000. It is clear that Brunei receives most of its visitors from the ASEAN countries with Malaysians being the highest number of arrivals across the spectrum with 974,132 arrivals.

With regards to the tourists' arrivals, it can be seen that in 2000, the top twelve nationals arrived in Brunei from the highest to the lowest arrivals were: Malaysia, United Kingdom, Taiwan, Singapore, Indonesia, Philippines, China,

Thailand, Germany, USA, Japan and Australia. It is clear that the United Kingdom, Germany, USA and Australia are Brunei's major 'western' developed tourists segment whereas Malaysia, Taiwan, Singapore, Indonesia, Philippines, China, Thailand and Japan are her Asian market segments. Royal Brunei Airlines have direct flights to these major destinations apart from the USA. The German and UK flight routes are particularly important airways for Brunei tourism and have been targeted as potential market segments for VBY 2001.

**Table 10: Arrivals by Nationality and Purpose of Visit 2000**

	Total	Transit	Employment	Conference	Tourist	Business	Student	Relations	Official Visit	Other	Dependents
Australia	15,811	4,684	2,946	59	851	350	75	2,254	198	3,566	828
Austria	244	29	52	2	27	37	-	20	2	70	5
Bangladesh	3,519	8	2,241	4	20	30	4	236	4	928	44
Belgium	232	7	25	-	43	33	-	43	2	69	10
Canada	5,385	87	808	21	415	172	46	1,417	59	2,134	226
China	6,445	2,187	220	102	1,464	86	2	805	334	1,231	14
Denmark	228	5	28	1	57	13	-	40	-	75	9
Finland	54	11	1	-	14	1	-	10	-	17	-
France	1,961	67	466	3	115	187	2	313	76	633	99
Germany	4,964	736	599	3	1,077	248	19	786	26	1,299	171
Hong Kong	711	113	88	8	56	11	-	134	32	2,64	5
India	14,365	156	7,339	7	194	243	36	1,515	30	4,092	753
Indonesia	68,527	2,890	29,686	161	1,649	636	49	9,328	484	23,177	467
Ireland	423	65	97	-	39	20	4	47	3	125	23
Italy	255	16	19	1	49	35	-	57	3	71	4
Japan	4,544	191	506	77	898	397	6	634	440	1,331	64
Kampuchea	116	3	8	3	9	1	3	21	34	34	-
Korea	2,254	42	435	50	174	77	2	293	268	837	76
Laos	85	-	2	1	-	2	2	23	25	30	-
Malaysia	974,132	55,638	196,794	259	20,463	17,461	3,415	209,418	973	451,814	17,897

*Source: Immigration and National Registration Department, Ministry of Home Affairs*

**Table 10 (cont): Arrivals By Nationality and Purpose of Visit 2000**

	<b>Total</b>	<b>Transit</b>	<b>Employment</b>	<b>Conference</b>	<b>Tourist</b>	<b>Business</b>	<b>Student</b>	<b>Relations</b>	<b>Official Visit</b>	<b>Other</b>	<b>Dependents</b>
Myanmar	591	27	174	7	9	4	5	82	26	229	31
Nepal	11,459	18	5,503	2	69	35	17	1,049	17	3,930	819
Netherlands	4,809	112	990	-	342	127	27	805	6	1,857	542
New Zealand	4,641	88	1,371	30	189	121	50	686	64	1,623	419
Norway	463	25	59	-	60	44	1	64	4	152	54
Pakistan	1,957	157	761	3	36	27	7	247	26	557	136
Philippines	65,842	2,253	25,334	109	1630	343	73	1,0704	221	23,818	1,357
Singapore	27,995	373	5,236	96	1921	3,399	132	5,490	519	10,168	661
Spain	166	19	17	1	26	9	-	30	1	50	13
Sri Lanka	1,093	10	454	-	21	10	4	161	6	310	121
Sweden	380	21	25	3	89	29	-	112	2	93	6
Switzerland	421	27	30	-	99	35	1	94	3	125	7
Taiwan	10,067	2,390	519	38	2704	41	12	1,442	154	2,680	87
Thailand	17,117	265	6,981	63	1143	518	78	2,228	361	5,272	208
U.K.	43,865	2,030	10,417	58	3817	1,748	148	6,590	230	16,060	2,767
U.S.A	6,015	223	641	102	995	595	12	848	505	1,896	198
Vietnam	453	2	61	26	15	25	10	64	108	141	1
Oman	1,158	26	203	-	57	7	23	201	1	489	151
Others	4,017	383	540	121	405	146	54	545	416	1,184	223
<b>Total</b>	<b>1,306,764</b>	<b>75,381</b>	<b>301,672</b>	<b>1,422</b>	<b>41,241</b>	<b>27,303</b>	<b>4,319</b>	<b>258,836</b>	<b>5,663</b>	<b>562,431</b>	<b>28,496</b>

*Source: Immigration and National Registration Department, Ministry of Home Affairs*



### 2.11.2 Tourism Related Employment

Statistics on the tourism industry and its related industries are scarce. Unfortunately, there are no statistics which show the working population by sex and community categories for the tourism industry which is a multi-business industry. The coffeeshop, restaurants and hotel sectors, have however been consistently mentioned in statistical reports and analysis which makes it the basis for analysis in this section. However, Table 11 shows that according to the 1991 census, there are a total of 15,404 workers in the wholesale and retail trade, restaurants and hotels industry.

The ratio of men to women workers is approximately 2:1. In this census, it is also found that the highest number of workers are Chinese (46.6%), followed by Malay (30%), other races (16.7%) and other indigenous groups (6.6%). Male and female Malay participation is also 1:1 whereas the ratio is almost 2:1 for other indigenous groups. There are only 44% Chinese women working in this industry sector and the majority of workers are male. The other races indicate a 26.3% female participation rate.

**Table 11: Working population By Sex, Community and the Wholesale and Retail Trade, Restaurants and Hotels Industry, 1991 Census**

Gender	Total	Malay	Other Indigenous Group	Chinese	Others
Males	10,284	2,624	648	4,979	2,033
Females	5,120	2,020	370	2,193	537
Total	15,404	4,644	1,018	7,172	2,570

*Source: Department of Economic Planning and Development, Prime Minister's Office*

The number of employees in the coffeeshop, restaurants and hotel industries has significantly increased by 2431 workers in 2001 from 5,973 employees in

the previous year (Table 12). This corresponds to the increase in the number of establishments in this particular private sector which rose by an additional 182 establishments from 414 in 2000 to 596 establishments in 2001 (Table 13).

**Table 12: Number of employees in the Private Sector In the Coffeeshop, Restaurants and Hotels**

Year	Number of Employees
1991	2,814
1992	3,580
1993	3,843
1994	4,585
1995	2,880
1996	-
1997	-
1998	5,675
1999	5,873
2000	5,973
2001	8,404

*Source: Labour Department, Ministry of Home Affairs*

This may be because in at least two years before the official launch of VBY 2001, the government was already sending out signals to improve the private sector by promoting the development of SMEs. The promise of a tourism boom and massive multiplier effects across the economy had brought about increased private sector participation in these particular sectors as they are directly linked to tourism because it serves as the basic necessities of food and beverages as tourism consumables.

On average, this corresponds to the generation of an extra 13 jobs for every new establishment of a coffeeshop, restaurant or hotel in 2001. To this extent, this sector was generating some jobs in the economy from which the locals

could have gained meaningful employment. Instead only 28.5% (2397) of the total 8,404 workers in the sector are locals. The other 6,007 (71.5%) workers are foreigners.

**Table 13: Number of Establishments in the Private Sector the Coffeeshop, Restaurants and Hotels**

Year	Number of Establishments
1992	409
1993	315
1994	362
1995	456
1996	300
1997	344
1998	351
1999	388
2000	414
2001	596

*Source: Labour Department, Ministry of Home Affairs*

*Note: The figure above referred to the establishments registered with the Labour Department*

Statistics also indicate that the number of SMEs in operation in this sector total only 596 establishments only. As the private sector in Brunei is small, it is only natural that most of its SMEs are small with very few major companies which employ on the larger end of the employment of workers spectrum. This downward trend from small to medium-sized to large companies is illustrated across all the industries in Brunei

Indeed, as illustrated in Table 14, a majority of the SMEs are small (39.3%) and has between one to five workers. This is followed by SMEs with 6-10 employees and 11-20 employees at 27.3% and 21.9% respectively. There are few companies that employ between 21-50 employees (8%) and 51-100

employees (2.5%). The numbers of establishments employing 101-500 and over 500 employees are insignificant.

These statistics are based on registered establishments in the coffeeshop, restaurants and hotels sector. However, it is very likely that the numbers of registered establishments will be confined to establishments which are small in size.

**Table 14: Number of Registered Establishments in the Coffeeshop, Restaurants and Hotels (Private) Sector By Size in 2001**

No. of Employees	Establishments	
	Number	%
1-5	234	39.3
6-10	163	27.3
11-20	131	21.9
21-50	47	8.0
51-100	15	2.5
101-500	4	0.7
Over 500	2	0.3
Total	596	100

*Source: Labour Department, Ministry of Home Affairs*

With regards to the estimates of GDP at current prices in the restaurants and hotel industry over a ten year period from 1992 to 2002, it can be seen that there is an increase from BND77.9 million in 1992 to BND148.6 million in 2000 (Table 15). This upward trend was similarly found in estimates of GDP at constant prices from BND33.6 million in 1992 to BND56.5 million in 2000.

This is because by 2000, all of the major hotels in Brunei was in operation and was thus able to contribute towards this figure. In 1999, Brunei hosted the SEA Games and then in 2000, it hosted a major international event, the APEC

Summit meeting. There were higher numbers of tourists into Brunei for these events thus making the restaurants and hotel industries more profitable. Thus in these years, the estimates of GDP at current prices and constant was higher than in previous years.

**Table 15: Estimates of Gross Domestic Products at Current Prices,  
Contribution of Gross Domestic Products at Current Prices and  
Estimates of Gross Domestic Products at Constant Prices in the  
Restaurants and Hotel Industry**

<b>Year</b>	<b>Estimates of GDP At Current Prices (B\$Million)</b>	<b>Contribution of GDP At Current Prices (B\$Million)</b>	<b>Estimates of GDP at At Constant Prices (B\$Million)</b>
1992	77.9	1.2	33.6
1993	85.8	1.3	36.3
1994	96.1	1.4	39.9
1995	108.0	1.5	44.0
1996	127.8	1.7	46.6
1997	135.3	1.8	53.0
1998	138.0	2.1	54.3
1999	144.9	2.0	55.5
2000	148.6	2.0	56.5
2001*	141.2	2.0	53.4
2002*	149.1	2.0	56.2

*Source: Department of Economic Planning and Development, Prime Minister's Office*

*Note: \* Provisional*

The provisional figure of BND141.2 million in estimates for GDP at current and constant prices for 2001 was a decline by almost 5% and 5.5% respectively. This is also reflected in a negative growth rate of 5.4% in the same year (Table 9). It is believed that this was caused by several factors. There was lower hotel activity due to the September 11 attack on America which affected

the global travel industry. As a result, the hotels in Brunei suffered massive room cancellations because the international patrons were too insecure to travel. The Brunei economy was also very sluggish with the collapse of the Amadeo Company leading to less business interest in Brunei. People were more aware of a recessionary period which lowered spending in these industries.

With regards to the contribution of GDP at current prices in the hotel and restaurant industries, it can be seen that there has been a rise from BND1.2 million to a high of BND 2.1million in 1998. This however decreased by 0.1 million in the following and has remained stagnant since. This is a far cry from the projected figures for the tourism industry as illustrated in the Masterplan.

**Table 16: Gross Domestic Products Growth Rate in the Restaurants and Hotel Industry**

<b>Year</b>	<b>Gross Domestic Products Growth Rate (%)</b>	<b>Year</b>	<b>Gross Domestic Products Growth Rate (%)</b>
1992	5.3	1998	2.5
1993	8.0	1999	2.2
1994	9.9	2000	1.8
1995	10.3	2001*	-5.4
1996	5.9	2002*	5.3
1997	13.7		

*Source: Department of Economic Planning and Development, Prime Minister's Office*

*Note: \* Provisional*

### **2.11.3 The Hotel and Travel Agency Industry in Brunei**

Brunei's lodging industry grew from 8 (1985) to 13 hotels in 1999 most of which are within the medium-luxury end. There are now approximately 2,800 rooms. The growth spurt was due to the anticipated increase in tourist arrivals for the SEA Games in 1999. Sadly, this never materialised.

According to the BTDU, the average length of stay in Brunei was 3.7 days in 1994 and 3.6 days in 1995. By 1996, the daily occupancy rate had decreased to 2.6 days (1998 Tourism Masterplan) and a survey by Tan and Omar (1998) further concluded that 65.2% of hotels reported a short stay trend amongst their guests which did not exceed 1-3 days. There is no proper classification of accommodation in Brunei. The lack of such a system is detrimental for tourism in Brunei because the hotels can mislead potential guests by classifying themselves according to their own standards and not according to international classification.

Data on budget/economy lodgings are also not available; this segment appears to have been overlooked in the industry. The Masterplan recommends that a framework for ranking hotels be established. Each establishment will receive rankings between one to five stars according to the range and level of service provided. The plan itself recommends a maximum carrying capacity of 3,000 rooms.

As illustrated in Table 15, the hotel industry combined with the restaurant sector has contributed BND 2.0 million to the country's GDP for the past four years. This figure would have been higher if global geo-political events had not deterred travel into the country (e.g. the Bali bombing, the haze effects, terrorists threats) Despite not having a proper classification system of accommodation, there is a collective hotel organisation called the Brunei Association of Hotels (BAH) which was established in 1996.

This association has with the following aims:

- To improve the hotel relationship between local, international and overseas travellers arriving into Brunei
- To plan, coordinate and implement projects that will enhance the productivity of the members in the hotel industry, and
- To create better linkages between the local hotel and the related service providers and businesses in Brunei.

BAH unfortunately does not have much power in this industry. However, in an effort to increase local labour participation in this industry, it has also signed a Memorandum of Understanding (MOU) with the vocational institute in Brunei, the Sultan Saiful Rijal Vocational College to ensure that qualified locals are produced according to industry needs.

There are currently 45 licensed travel agents in Brunei. All of them are members of the Brunei Association of Travel Agents (BATA). Similar to BAH, it has very little power and relied heavily on government assistance.

#### **2.11.4 Budgetary Considerations of the National Tourism Organisation**

Being a public sector department, the BTDU has an annual budgetary allocation for its operations. The budgetary constraints are also factors which have impeded the success of previous marketing endeavours of the NTO. From 19996 to 2000, the BTDU received a paltry BND 2 million per annum compared to the millions more spent by other regional NTOs from Thailand, Singapore, Malaysia and Indonesia.

The BTDU only received a special increment of BND 3 million on top of the annual budget of BND 2 million for VBY 2001. This extra BND 3 million was specially earmarked to create tourism awareness in the target markets as outlined in the tourism Masterplan. This amount covers expenses from printed materials, special promotional gifts, transportation, costs of materials, sponsorship for local travel and tourism representatives, cost of exhibition



booth, participation fees for international travel and tourism road-shows and exhibitions such as the annual year end World Travel Market in London.

#### **2.11.5 Tourism and Hospitality Training and Other Tourism-Related Education**

There are very few tourism and hospitality training institutions in Brunei. The Sultan Rijal technical College (MTSSR) offers National Diploma programmes in Hotel and Catering Management, Travel and Tourism Services. It also offers a pre-National Diploma programme in Travel and Tourism Services. There is one other private institution which offers tourism and hospitality related courses which was due to have its first intake of students in mid 2001.

Souvenirs are necessary tourism consumables. With this respect, the Brunei Arts and Handicrafts Training Centre can play a pivotal role in reviving the country's heritage in traditional arts and handicrafts which may be sold for souvenirs. This Centre offers a diverse range of course from silver-craft, brass-craft, plaiting and songkok making, cloth-weaving and engraving.

In February 2001, the first private hotel school, the Brunei Hotel Training Services (BHTS) was opened in Brunei for the first time (BB, 1<sup>st</sup> February 2001). The school is a joint venture between Brunei Hotel, the country's oldest, and Canberra Institute of Technology (CIT) a top Australian educational establishment. The school aimed to train 30 local students for a one-year Certificate IV course covering front desk, housekeeping, food and beverage, cookery and assistant supervisory level courses. The one year course would cost around \$10, 000 and would serve as a training ground for the local hotel industry staff to train professionally and become qualified.

The CIT's interest in Brunei stems from APEC days which Brunei hosted two years ago when the Australian institute helped to train local youths in food and beverage sector as part of the APEC hospitality drive.

### **2.11.6 Profile of Tourists into Brunei**

There is very little empirical research on the socio-economic profiles of incoming tourists into Brunei. The definition of a tourist as applied by the BTDU itself is somewhat ambiguous; it considers a tourist to be someone who stays in Brunei 'for more than one day but less than a year'. This requires serious consideration before the exact number of tourists may be determined for research and statistical purposes.

A survey conducted by Yusuf (1997) of 180 randomly selected international tourists concluded that 26.7% originated from the UK, a target market for Brunei's tourism. This is followed by Malaysia at 22.2%, the Philippines (9.4%), Singapore (6.7%), Australia (6.1%), Japan (5%) and the rest of the other countries at less than 5% cumulatively.

A high proportion of these tourists were professional (41%), legislators, administrators and managers (36%), students (36%) and service workers, shop workers, markets and related sales workers (26%). The sample frame was mainly within the 21-30 year age group (36.1%) with 13.9% in the 41-50 age range and 12.8% within the under 20 range.

Interestingly, it was found that 26.7% of the survey participants had high levels of income at over BND50,000 and over half were first time visitors into the country (51.4%). A high proportion were single travellers (44.4%) and 28.9% had travelled with their families. The others had travelled with friends and relatives. It was also found that 45.6% of the tourists came to Brunei for vacation/pleasure purposes and was prompted to take their holidays in the country by word of mouth recommendations from friends and relatives.

Most had to make self arrangements for their visit (66.1%) which may be due to high travel agency costs for tour packages or lack of advertising by the travel agents thus the visitors were unaware of such services. Most tourists (67.2%) stayed in Brunei between one to ten days and had used the services

of RBA to fly into the country (63.3%). Most (43.3%) found shopping in Brunei to be expensive when compared to other countries.

## **2.12 Some Strategic Considerations in Tourism Development in Brunei**

There are also negative perceptions that exist regarding the country's product delivery (i.e. things to do). Most of the evidence on tourist motivation points to the 'sun, sand and sea' factor as major reasons to travel and this limits the popularity of Brunei thus the industry's growth. However, Brunei is safe. Safety constitutes the first and central requirement of tourism. Richter and Waugh (1986,231) concluded that 'Tourism is frequently an early casualty of internecine warfare, revolution or even prolonged labour disputes. Even if the tourists areas are secure (...) tourism may decline precipitously when political conditions appear unsettled. Tourists simply choose alternative destinations'. Many national leaders and planners understand this it is indeed political serenity, a not scenic or cultural attraction, that is prioritised here. That is why it is necessary to capitalise on Brunei as being a family-destination.

It is also apparent that the tourist industry is highly vulnerable to economic restrictions (Mathieson and Wall, 1982). With the Bruneian dollar relatively stable during the Asian financial crisis, Brunei is a comparatively expensive place to visit, when compared to the Malaysia and Thailand both of which have extremely devalued currencies. Brunei will have to be very competitively priced in order to attract tourists.

There is very stiff competition amongst the ASEAN countries that are more varied in their offerings and are considered to be major industry players in this region. For example Malaysia is a very strong industry leader in the ASEAN tourism context. It has gained increasing popularity since its successful first 'Visit Malaysia Year' in 1991 In 2002, Malaysia received 13,292,010 tourists visitors which spent a total tourist expenditure of RM 25,781.1 million. The latest figures show that the current tourists arrivals for 2003 is so far 2,875,147. ([http://www.tourism.gov.my/statistic/tourist\\_receipt.asp](http://www.tourism.gov.my/statistic/tourist_receipt.asp)).

Brunei needs to market itself aggressively in the international arena to achieve the desired results. However, the limited budgets awarded to the BTDU are a major challenge for effective and efficient marketing as other NTOs have more budgetary allowances for such activities and also more marketing experience and capabilities than the BTDU.

Tourism's ability to generate employment, not only in the formal sector but also in informal sector activities (Elkan, 1975), has been cited as one of its key advantages for developing countries (de Kadt, 1979). Tourism development is forecasted to create 11,000 jobs in Brunei. The multiplier effect of the tourism industry will cut across all employment spectrums and in all industries, and will benefit the strong and skilled local workforce. Brunei however, lacks the necessary skilled manpower.

Education and tourism training are considered strategic elements of the plan to develop tourism and is an integral part of the services component. There is a lack of support from the Ministry of Education to improve this aspect of human resource development. There is only one vocational institution offering a limited variety of courses in tourism and hospitality-related fields that includes a few months of industrial placement. The highest possible level attainable is at national diploma level. At any one time, there are 200 students receiving such education.

There are signs of increasing numbers of graduates from the only technical institute offering tourism and hospitality programmes, Maktab Teknikal Sultan Saiful Rijal (MTSSR). However, the industry itself does not offer immediate employment to them. Certainly, the industrial linkages are weak in Brunei. This highlights the need to develop the tourism sector of Brunei's economy in order to absorb this small excess capacity. This institution currently does not have any Memorandum of Understandings with other international institutions to promote collaboration. This does not allow for the valuable exchange of experiences in other international settings which will benefit the service hospitality skills of the students and thus enhance their marketability in the job market.

The educational efforts so far appear to be more towards catering for the needs of the industry, not to improve its standards such as health and safety. It is obvious that the level of education and training facilities offered at MTSSR, is insufficient when the number of potential tourism-related employees is expected to be approximately 11,000. Some view the promise to deliver the thousands of jobs as being 'a dream' and that economic reality will prevail. Also due to its insufficiencies, the quality of the graduates is also marginalized. Most employees in the tourism industry require their skills to be upgraded through in-house training, which tend to be specific and thus may lock in the employee to the organisation.

There is a great need to produce a skilled workforce in a very short period of time. It is foreseeable that external hospitality training consultants must be employed to provide the necessary skills for future tourism industry employees. There is also scope for other education providers catering to tourism and hospitality training in Brunei.

There are also other dimensions that the plan has not covered in detail. For example, the plan does not actively set out to foster sustained growth of the tourism sector and achieve a greater and better distribution of the generated wealth among the country's local economy. The issue of how to achieve balanced development of regional tourism by fostering the use of natural, historical, and cultural resources, as well as the potential to strengthen the national identity of Brunei Darussalam by preserving cultural, historical, and traditional values should have been emphasised more.

Despite being a service industry, the industry itself is notoriously fickle. Tourism service providers (e.g. front-line workers such as waitresses, bell-boys and so forth) are given lower wages in comparison to other industries. This plan does not include in great detail the social and personal directives, which would create fairly well paid jobs that would help improve the standard of living of the locals. Nor does it set out a framework to change the negative attitude of older Bruneians towards employment in the tourism industry.

Another strategic consideration is tourists' goods consumption. Brunei imports almost all of its goods for consumption. The emerging Asian economies found tourism to be an important source of finance for capital-goods imports during their industrialisation process (Delos Santos et al., 1983) but Brunei is excluded from this benefit. Brunei is not an exporter of other commodities apart from oil and gas.

In contrast to large economies such as Malaysia, which can supply a high proportion of the goods, and services, which tourists consume, many developing countries like Brunei are characterised by relatively weak linkages between tourism and other sectors of the economy. This includes primary products in which many developing countries are supposed to have a comparative advantage (e.g. rice). Small-island economies and microstates, which are often dependent on tourism for high proportions of their foreign currency earnings, are particularly vulnerable in this respect. In the case of Fiji, the import content of tourist expenditure on food was around 56 per cent and of beverages 45 per cent (Varley, 1978). For Brunei, these expenditures remain to be seen.

The governments of small developing countries are relatively disadvantaged in their ability to formulate and implement the strategic policies that would be most beneficial to domestic firms. There should be more emphasis towards creating a more viable tourism support industry in Brunei. With a strong business community in tourism and tourism-related activities that is complemented by greater co-ordination from BTDU Brunei is more likely to succeed. This in turn would translate into higher retention of tourism revenue in the country.

## **2.13 Summary**

The Tourism Masterplan for Brunei examines all aspects of tourism as an integrated system. It recognises that tourism development in Brunei requires a cautionary measure because of its strong Islamic culture and lifestyle. The plan recognises that considerable investment is required to improve and

expand the tourism product line in Brunei in terms of attractions, facilities, infrastructure and services. It is hoped that the budget allocated in the 8<sup>th</sup> National Development Plan, which amounts to BD\$41 million or 3.6% of the total allocation for the industrial and business sector will further enhance the development of this industry.

It should be noted that Brunei is extremely conscious of its environmental treasures and has a nature conservation programme. The selected environmental sites will be an important source of tourist income and entry into these sites will be tightly controlled. The marketing strategy is sound but it is likely that unless more funds are released. Due to restrictive funding, the BTDU must be more selective in its marketing and exploit other channels of free advertising such as greater use of the Internet.

Product improvements must already be carried out before any marketing activities are carried out to ensure that there is no marketing gap between what is available and what is promised in the tourism product. Marketing Brunei as a stopover destination is also appropriate in that it will receive continuous tourism revenue from tourists who are more interested in making a multi-tour of Borneo or the South East Asian countries.

However, there are potential constraints to tourism development that have been mentioned in the plan but a fully comprehensive framework to overcome these impediments have not been provided in great detail. Rather, these problems fall out the scope of the plan and have been left to other governmental agencies.

If the plan is comprehensive enough and has encompassed schemes and processes adequate for achieving substantial economic and social positive results, then surely success will follow. If however, the results of the plan, as measured by number of tourists attracted and revenues generated, were not found to be substantially better than at the start of its implementation, then it is essential to look at potential causes of its failure.

Factors such as Brunei's inadequate infrastructure provision, human resource development, weak private sector and mis-identification of the stakeholders could be the underlying reasons for the lack of substantial success of Brunei's tourism industry. These deterrents to full strategy implementation will be analysed and using these as constructs, a new emergent strategy will be produced which will have interesting implications for future tourism development and policy-making.

To achieve balanced tourism development, tourist activities must be based on a national system of democratic planning. The tourism industry is closely related to a large number of means of production, without which the effort of creating true development would be fruitless. It was therefore imperative to review and actualise the lines linking the public administration institutions with private entities and to coordinate activities affecting all stakeholders.



## **CHAPTER 3**

### **LITERATURE REVIEW**

#### **3.1 Introduction**

The multi-disciplinary nature of tourism studies has necessitated an analysis of a wide range of topics. The impetus of this study is to investigate and understand the nature of tourism stakeholders, illuminate tourism management in Brunei, and to elicit stakeholder perceptions of this industry. For the purpose of this research, it is therefore vital to look at the field of strategic management as it is of particular relevance for this study. A general consultation of tourism literature was conducted along with specific reference to tourism stakeholder management theory. Consultation of related literature pertaining to strategy formulation, community based participation in tourism and Islamic management principles were also undertaken, these being relevant to the construction of a locally applicable tourism developmental model for Brunei. Essentially, most of the literature presents western perspectives, as there is a dearth of literature or research studies available on the above subject within a Bruneian context.

This chapter is divided into various sections each outlining particular literature reviewed. Section 3.2 provides a general examination of strategic planning in business. Section 3.3 relates to the evolution of strategic management and planning in the travel and tourism industry. Section 3.4 discusses selected models of tourism competitiveness and value-added tourism. Section 3.5 examines the literature on tourism planning and development. The use of the stakeholder theory as a normative tool for tourism planning is analysed in Section 3.6. The next section, Section 3.7, refers to selected literature on community-based tourism. Section 3.8 introduces the MIB-tourism relationship with each component of this national philosophy dissected and related to tourism. MIB perspectives on tourism are presented in Section 3.9 and a concluding summary of the findings of the literature review is presented in Section 3.10.

This is followed by Section 3.11, which reviews research orientations or methodologies. The following section 3.12 outlines the data collection process and this is concluded by Section 3.13, which provides an overview to the problems of research fieldwork in Brunei.

### **3.2 Strategic planning in business**

Planning forms part of the integral operational daily activities of a firm regardless of the nature of the industry. Tourism as a new industry has proven that traditional long-range planning is inapplicable because of the rate of change and innovation demanded by its buyers. As Choy (1991) points out, tourism requires proactive planning and long-range planning is incapable of this. Strategic planning is seen to be able to bridge this gap thus there is a definite theme towards implementing strategic planning in tourism (Athiyaman and Roberson, 1995). Strategic planning by a National Tourism Organisation (NTO) at community and organisational level is encouraged (Soteriou and Roberts, 1998). Despite its importance, strategic planning as a framework and strategic management as a process within the tourism context is noted for its absence in the literature (Athiyaman 1995, Gilbert and Kapur, 1990).

Strategic planning and strategic management are slippery concepts to define. Bryson (1995) defines the former as a 'disciplined effort to produce fundamental decisions and actions that shape and guide what an organisation is, what it does, and why it does it' (p.4). It aims to produce a strategy which will achieve a 'strategic fit' of 'synergy' between internal capacity and resources to that of external threats and opportunities (Hofer and Schnedel, 1978).

A leading management theorist, Ansoff (1984) defines strategic management as 'a systematic approach to a major and increasingly important responsibility of general management to position and relate the firm to its environment in a way that will assure its continued success and make it secure from surprises'. He also defines strategy as a 'rule for making decisions under conditions of partial ignorance, whereas policy is a contingent decision' (1965).

Recent discourse in strategic management has highlighted the shift in strategic thinking as illustrated in the changing models of strategy from Porter's Five Forces Model in the 1980s, to Hamel and Prahalad's Core Competency Model in the 1990s and now, in the 2000's, Brown and Eisenhardt's Competing on the Edge Model (1998). Strategy is truly under uncertainty in today's unstable economic conditions (Courtney, Kirkland and Viguerie, 1997) and requires re-assessment because the rate of change outpaces the rate of innovation in traditional schools of strategic management.

Mintzberg and Quinn (1991) attest to this point and elaborated on the ambiguous nature of strategy when they say, "There is no single, universally accepted definition of strategy. There is no one best way to create strategy, nor is there one best form of organisation. The world is full of contradictions, and the effective strategist is one who can live with contradictions, learn to appreciate their causes and effects and reconcile them sufficiently for effective action. No single model or theory can incorporate all the factors that influence major business decisions or all possible combinations of these factors that could be faced. Nor can any anticipate the bizarre changes that occur in real world environments, or, even more important, the impacts of your own or others' creative innovations"

There are two main schools of thought on strategy formulation. The first is that strategy is the outcome of formalised planning (Ansoff, 1965; Andrews, 1971). The normative or synoptic model dictates that the strategic process is highly controlled, rational, systematic and proactive. Organisations actively undergo environmental assessments, set and pursue well-defined goals according to a carefully devised plan, establish contingency plans and analyse their own internal capabilities and resources. The second vein of thought regards strategic formulation as an incremental process which views strategy as the cumulative result of years of strategic decision-making by management (Mintzberg 1978; Quinn 1980).

Organisations seek to formulate the best strategy to gain competitive advantage over their rivals. Porter (1990) states that 'competitive advantage is

created and sustained through a highly localised process' but his traditional model of competitive advantage is limited to a unit of analysis namely, the firm, in firm rivalry behaviour within a particular industry or country. This is the predominant theme in many competitiveness models and this is linked to conventional standards or indicators of performance such as market share, profit and loss accounts and market growth.

Porter (1990) argues that central to the business strategy is the generation and preservation of competitive advantages through value creation and value adding in the value-chains. The value chain is a series of inter-linked processes or functions that helps to add value to the firm's products so those customers receive a superior value and thus enable the firm to achieve superior performance. Porter categorises these functions into several components from inbound logistics (ensuring all resources necessary for production are available), operations, outbound logistics (product distribution), marketing and sales (to attract customers) and finally service (customer retention) to ensure that customer satisfaction is reached.

Porter has two 'value' definitions from both buyer and seller perspectives. The buyer value chain refers to how customers utilise the products that they have purchased. Here, 'value' is derived through product performance even if it is in terms of 'quality of life'. The 'value' in the seller value chain represents the total worth of the services buyers procure or alternatively, the price buyers are willing to pay for the product or service. It is only when customer expectations of the value of the product are exceeded that they will return as repeat purchasers.

These conceptualisations originate from the world of business. It is easily applicable when the unit of analysis is a single business unit or a firm. Employing it beyond conventional boundaries into industry is more challenging, particularly in a multi-business industry such as tourism.

### 3.3 A Corporate Strategy for Tourism?

John Tribe (1998) attempted to formulate a generic 'Corporate Strategy for Tourism' but some critics have labelled this as too simplistic. His proposed model lacked the necessary processes that would enable prospective users to go beyond the traditional economic stakeholders of a firm. His attempt is symptomatic of the difficulty in devising a systematic travel and tourism strategy that will help to create the 'synergistic fit' according to normal and disciplined business convention in this industry. Tourism activities and processes is a complicated arrangement concerning many interdependent stakeholders. Clearly there are limitations to strategy formulation in this industry. The bottom line is that tourism is not like the typical industry. Strategic thinking may not be enough to counteract or to anticipate the changes in this rapidly evolving nature of this industry.

The travel and tourism industry is a service business operating in a highly interactive and complex industry. Nasbitt (1995) has identified it as a 'paradigm service industry'. The other two are telecommunications and information technology. The growth spurt from the mid-1950s in these three industries was driven by technological advancement.

In essence, the paradigmatic nature arises because these two elements blur and transcend industry boundaries. Thus paradigmatic service industries become more a 'function of dynamic consumer demand for service than for a grouping of common producer of goods or services' (WTTC). Characteristically, the tourism paradigm service industry has very short product life cycles, offered in volatile market situations requiring fluid, flexible strategies.

McKercher (1999), following Brown and Eisenhardt's (1998) postulations on the inadequacy of current strategic thinking in the telecommunications industry, has done nothing to dispel the notion that perhaps the formulation of a singular tourism strategy is impossible when he applies chaos theory in tourism. He claims that complex tourism processes are too dynamic and are

thus inherently non-linear which means that there can be no comprehensive, critical and coherent strategic planning in this industry.

The travel and tourism industry is made up of a myriad of other businesses, each offering a variety of different service and products. This factor, in tandem with its short product life cycles creates a massive problem for developing a singular cohesive and coherent strategy for this industry. To put it simply, there are many fingers in this lucrative pie. There are too many diverse organisational objectives and this means that having a shared tourism vision even at national level may be exigent.

For example, the Australian National Tourism Strategy has identified 33 core travel and tourism businesses in its own tourism industry. These range from accommodation, transportation, services, catering and recreation for travellers. The Australian National Tourism Organisation recognises that the sheer number and complexity of inter-relatedness of the industry players had fashioned an industry that is 'so woven into the economy that its significance often goes unnoticed'.

### **3.4 Models of tourism competitiveness and value-added tourism**

Porter's competitive advantage model refers to the analysis of the firm as a strategic business unit. It is clear that this model has limited applicability because it cannot be used in its traditional form in the tourism industry. Furthermore, there is a need to look beyond conventional indicators of performance, which in the tourism industry should encompass other measures of competitiveness, which may not be easily quantifiable or easily seen. Hassan (2000) defines competitiveness as 'the destination's ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors'. A measure of performance that may be included based on this definition may be an assessment of the health of the host's natural environment.

Contrary to Porter's model of competitiveness, Hassan (2000) suggests that the determinants of market competitiveness in the tourism industry will be comparative advantage, demand orientation, industry structure and environmental commitment. The unit of analysis is the destination itself. In a nutshell, the potential for the preservation of sustained market competitiveness impinge on a destination's comparative advantages in factors that affect its macro and micro environments, its flexibility to respond to changing market demand, the presence or lack of organised tourism-related industrial infrastructure, and finally, its commitment to environmental protection.

Hassan (2000) proposes a competitiveness model for the tourism industry that exhibits the wide range of businesses and industries involved ranging from entertainment, accommodation to hospitality. He stresses the importance of the cumulative effect of value-added activities that will impact on the nation's tourism industry's competitiveness in the global market, as these will enable the realisation of high market growth. Caution against excessive pursuit of market growth at the expense of the environment will not lead to sustained competitiveness as shown in Butler's tourist demand cycle (1980).

Butler's (1980) model shows the stages of touristic appeal of new to old destinations, from interest to disenchantment. A destination will go through several distinct phases of appeal. The first is when the destination is relatively virgin territory in terms of tourist exposure and touristic resources. Over time, the destination will appeal to greater market segments and will thus attract more tourists through information dissemination (e.g. brochures). Increasing tourism demand will act as drivers for greater tourism development and growth. This consequently accelerates supply-side development, which is working in tandem with greater marketing promotion of the destination. The final and critical level is reached once the destination's carrying capacity is breached; this result in massive environmental degradation and tourist arrivals will decline as an indication of tourism disenchantment of the destination. Hawaii, Mexico and Spain are good examples that illustrate the cyclical nature of tourism demand.

Service delivery is the basis of tourism and without effective human resource management the industry will fail. Various studies have confirmed the fundamental importance of competent management and in particular human resource management in competitive strategies (Dimmock, 1999). In tourism, the application of Michael Porter's value chain may be seen as an opportunity to gain a competitive advantage over other tourism product suppliers. The value added model appears to have practical applicability in the service chain. However, even this concept breaks down in tourism.

The business concept of 'value' must essentially be defined by both the seller and buyer and must be reinforced during the customer recruitment and retention stages. This is where the problem lies. The tourism product is a unique because there is no pre-travel experience of the product, only post-travel. For example, a traveller purchases a tourism product in the form of a package tour of Bali, Indonesia. His or her expectations of the value of the trip may only be confirmed after the completion of the tour itself; only then can the traveller determine if there was real value derived from the experience. The seller on the other hand is likely to have a different value attached to the sale of the product, for example, an equitable monetary return for the provision of the package tour. There is an immediate discrepancy between the 'values' assigned by both parties. It is very problematic to reconcile these differences.

Stakeholders' relationships must be managed at all operational levels because they themselves are value-creators (Cummings and Don, 2000). Porter (1980) advocates that the organisation adds value along the chain of production from start to finish and after the sale of the product. The implication here is that the firm is aware of its stakeholders who are involved in the value-chain.

Value adding in tourism differs from conventional value-adding activities and programmes because of two factors. First, a stakeholder's role in the value-creation in tourism is not static but flexible, multiple as opposed to singular. Secondly, most stakeholders have not been identified and thus are excluded from this iterative and processual activity. Drawing on Cummings and Don's



(2000) business-based model, managers should undertake a stakeholder valuation analysis to assess the worth of the value that these stakeholders have on the product. They conclude that stakeholders exert either positive or negative impacts on value creation in the firm's political, economic, social and technological environments and are thus key value creators or destroyers respectively.

The multifarious and forceful drivers of the tourism industry such as technological advancements and fickle tourist demand require the application of business management logic from a different perspective. Strategic management as a discipline has too many generalisations of what a business should be. This has proven to be incompatible in tourism industry strategy that urgently requires modified and refined tools of management. There is a critical need to evaluate business management theories, models, concepts, tools and techniques so that they will be of use in tourism. Harsh as it may seem; archaic business models must be discarded in this fast evolving industry.

Market competitiveness will rely more on a destination actively seeking sustainable tourism development. This will involve greater sophistication in planning and strategy making. A prerequisite in an effective sustainable tourism strategy will involve a mechanism for the proper identification and the value of both economic and non-economic stakeholders, involving the local community, public and private sectors, environmental organisations and so forth.

### **3.5. Tourism planning and development.**

Comprehending the processes of planning is essential if tourism development is to be implemented. Eminent tourism theorists have advocated various models of tourism planning from Doxey's (1975) simplistic unidirectional model to later, more complex frameworks as suggested by Gunn (1979) Murphy (1985), Inskeep (1991), Krippendorf (1987) and Pigram (1993).

According to the Gunn (1979) in her functioning tourism system, tourism planning has component categories, which should be grouped into interdependent functional units. These units comprise people (tourists), attractions, service-facilities, transportation, and information-direction. These are all intimately linked together in an interdependent relationship. The end result is that these units act together to influence a country positively from economic, social and personal, and environmental perspectives. Gunn also includes another component unit, the environment, into the framework to highlight the attention towards ecological preservation of natural resources.

This model is however frequently criticised for being too traditional, westernised, and for being excessively narrow in focus on developmental issues. Getz (1986), another eminent tourism theorist, suggests applying an integrated systems model as a framework for tourism planning because it avoids the pitfalls in Gunn's model and also provides an opportunity for tourism's theoretical development. Getz drew on Chadwick's (1971) approach to planning, which is based on general systems theory. This theory states that all the activities and actors with influence in tourism as making up a complex tourist system, with each part operating in relation to the others.

Tourism is therefore a composite product, involving transport, accommodation, catering, entertainments, natural resources and other facilities and services such as shops and currency exchange. It differs from other products in that it cannot be examined prior to purchase, cannot be stored and involves an element of travel. Hence it is useful to examine it not as an industry per se but as a collection of interrelated industries and markets located in both industrialised and developing countries. This creates enormous problems in identifying the stakeholders. One can perhaps only refer to the service providers mentioned in the plan as the stakeholders. These include tour operators, travel agents, the national carrier, and transport providers such as taxis, boats.

Transferability of tourist development to and among the developing nations is arguable (Butler, 1992). Hall (1994) noted that although the specific

conceptual approaches to tourism development are attractive to the less developed nations who are eager to exploit their environmental resources as comparative advantage, he could not relate these models to contextual conditions of countries such as Albania and North Korea whereby these would have long term applicability or validity.

Although there is wisdom in applying some western concepts underlying tourism planning and development models, there is scope in the framework for creating a more local approach to tourism planning. Tourism theorists such as Murphy (1985) and Krippendorf (1987) have argued for new approaches to tourism planning. Hawkins (1993) and Ritchie (1993) propose a shift towards resident-responsive tourism planning and development. Common to their arguments is the development of a tourism model that encompasses a wider sphere of stakeholders.

### **3.6 Stakeholder theory as a normative tool for tourism planning**

Kurt Lewin, a very notable social scientist, first quoted a now much-copied phrase "there is nothing so practical as a good theory". However in the field of tourism, theoretical discourse and development is limited mainly because it is a relatively new discipline and because it has a multi-disciplinary nature (Dann, Nash and Pearce, 1988). Many philosophical assumptions are derived from other sources e.g. anthropology, management, marketing, economics, marketing, psychology and so forth.

Many models and theories have been applied in this field including Freeman's theory of the stakeholder (1984). The stakeholder theory and the stakeholder management concepts have received a lot of attention because it is seen as a useful tool to facilitate sustainable tourism development. The 'stakeholder theory' is a concept derived from organisational management. It is in essence an instrument used as a facilitator to ensure the ethical formulation corporate strategies. Freeman (1984) defines a stakeholder as any party (individual or identifiable group) who is influenced or can influence the accomplishment of corporate objectives. According to Freeman, stakeholders must be included in

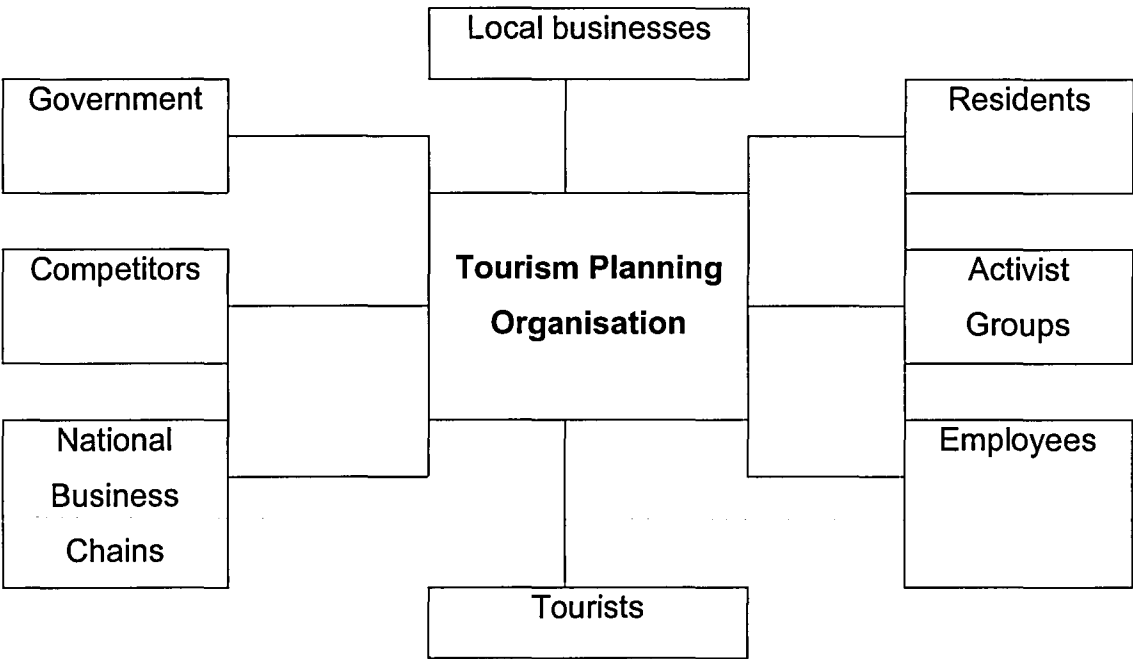
all business activities under a regulatory framework provided by the government. Freeman advocates that firms develop 'stakeholder management capabilities' (SMC) that will enable it to identify its stakeholders and their individual interests; it must also have suitable channels to facilitate stakeholder – organisations relationships and finally, management must itself have a set of transactions of bargain between both parties.

Linked to the concept of stakeholder management is the concept of morality and ethics. Managers are also bound to conduct their activities and decision-making in a moral manner (Donaldson and Preston, 1995); it may also serve as a tool to deliver sustainable tourism development in an ethical manner as advocated by theorists such as Wheeler (1992), Simmons (1994) and Robson and Robson (1996).

Morality and ethics is in turn linked to social responsibility. Spratlen (1973) provides an insightful analysis of five key themes which validates corporate intentions concerning social responsibilities i.e. power, mutual benefit, enlightened self-interest, enterprise defence and ethical-orientation. The power thesis for example, 'is an acceptance that power over stakeholders, as in the case of persuasive advertising, must go hand in hand with accepting social responsibility'. However, there will be varying responses in terms of behaviour and attitude to carrying the burden of social responsibility from different firms. In Brunei's case, the national tourism organisation, the Brunei Tourism Unit, will have a different degree of social responsibility than NTOs in developing countries because of its governing national philosophy, the MIB concept.

Sautter and Liesen (1999) provide a practical and uncomplicated adaptation of Freeman's stakeholder theory with the tourism planning organisation as the main actor. The writers have selected eight main stakeholder groups that a typical planning organisation is likely to interact with.

**Fig. 1 The Stakeholder Theory Model (adapted from Freeman)**



Source: Sautter and Liessen (1999)

The Australian National Tourism Strategy (1992) is used to illustrate the wide variety of NTO-stakeholder relationships. These stakeholder groupings made of mainly of business entities clearly illustrate the diverse nature of businesses operating in this industry:

Accommodation: hotels/resorts, motels hostels, caravans and camping Advertising media Attractions: Man-made and natural Auto/craft manufacturers Banking services Cameras and films Cartographers/ printers Clothing manufacturers Communication networks Construction/real estate Distillers/brewers/bottlers Education/training institutions Entertainment / arts venues Food and beverage Restaurants: fast food, wine merchants, food producers	Hotel/restaurant suppliers Luggage Maps, travel books Motor fuel producers Museums, historical sites Recreation/sporting equipment Reservation systems Service stations Shopping malls Souvenirs Sporting events Transportation: Taxi services, airlines, cruise ships, rail, car rental, bus coaches Travel agencies and tour companies
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Source: Australian National Tourism Strategy (1992)

The writers propose that tourism planners scan the current and potential membership of stakeholder groups and consider their respective strategic orientations before initiating any development initiatives. An effective collaboration with the selected stakeholders will lead to enhanced congruency across the strategic orientation of all stakeholder dyads and thus lead to the achievement of sustainable tourism development. The author concurs with the principle that stakeholders have tremendous powers be they instrumental or influential and have positivist value towards goal realisation of any tourism development plan.

However, there are various criticisms connected to the stakeholder theory. One can assume that applying an imperfect theory means that its inherent limitations will be brought into tourism. These include the difficulty in measurement of success of stakeholder management amongst the various stakeholders who have individual missions and value attachments. The concept assumes that stakeholders will be selected based on hierarchy and, from the perspective of the organisation. Essentially, the business organisation is placed at the forefront of the process that may be the biggest limitation of the concept itself. Freeman suggests that the organisation actively seeks out its stakeholders. However others argue that a stakeholder is supposed to be self-selected. The stakeholder theory then raises questions as to the identity of the selector of stakeholder groups and the identity of the party who will shoulder the responsibility for policing agreements

There are numerous critics who condemn the failure of this mechanism to 'deliver environmentally and socially sustainable economic activity' (Ekins, 1992) as evidenced by the inequalities of distribution of wealth and market place. National tourism organisations (NTOs) in developing countries characteristically lack tourism industry knowledge. Policy initiatives are often inhibited by the operational structure of the decision-making bodies that leads to fragmentation and duplication or overlapping responsibilities in public policy. It is therefore not surprising that there is confusion as to the roles and responsibilities assigned to respective government agencies in tourism planning and development. This leads us to question the validity and

applicability of adopting this theory in tourism. Baum's (1994) empirical investigation on international tourism policy supports the predominant belief that many National Tourism Organisations (NTOs) are not actively pursuing sustainable tourism development policies and stakeholder management but they do have major concerns for the environment. It appears that tourism planning is an area, which has limited consideration of the role of stakeholder management and environmental issues.

There is also the issue of power in stakeholder relationships. This model encourages non-preferential treatment of stakeholder interests. In any particular decision-making situation the operational priority will vary. It is usually the case that whoever has the most power will have their interests prioritised. It is difficult to imagine that the decision-makers remain impartial when urgent action must be taken.

Various studies have illustrated the ineffective tourism planning processes carried out by tourism planning organisation in developing countries. In most cases, the economic benefits of tourism have been emphasised more at the expense of socio-cultural benefits. For example, tourism plans in Pacific Islands are glaringly lacking in providing details of the negative socio-cultural effects of tourism on a community. However, despite its inherent flaws, the stakeholder theory may be a powerful tool in implementing stakeholder management as it serves as a platform to induce participation of the community as a stakeholder.

### **3.7 Community-based tourism: The Importance of Community Relationships in Tourism**

Hunzler's (1951) classic definition of tourism 'is the sum of the relations and phenomena which result from travelling and visiting an area by non-residents providing that it does not entail resettlement or paid work'. This illustrates the predominant attitude, when tourism was becoming recognised as a growing phenomenon that views tourism from a one-sided perspective, namely the tourist.

As the tourism movement expanded, it became clear that a more holistic approach was needed in conceptualising this phenomenon. Tourism must be viewed from other new dimensions to include all the relevant actors in this field. McIntosh and Goeldner (1990) provides a more modern and appropriate approach to tourism which is 'the sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host governments and host communities in the process of attracting tourists and other visitors'.

Modern tourism literature places a greater importance on creating sustainable tourism development models because of the overwhelming dependence of the industry on the sensitivities of the environment and on host societies. In recent years, the growing interest in promoting community-based tourism development planning is reflected in the increase in literature on this topic. However most of these works are based on community perceptions of tourism (Allen et al, 1988, McCool and Martin 1994, Perdue et al. 1990, Lankford and Howard 1994, Brunt and Courtney 1999, Ross 1992).

Community involvement in planning is essential because it serves as good public relations (Robson and Robson 1996) and can assist policy implementation Pigram (1993). Murphy (1988), Keogh (1990) and Simmons (1994) have emphasised greater local co-operation in instances whereby the community has been actively involved in tourism development processes.

Brohman (1996, 60) believes that 'community-based tourism development would seek to strengthen institutions designed to enhance local participation and promote economic, social, and cultural well-being of the popular majority. It would also seek to strike a balanced and harmonious approach to development that would stress considerations such as the compatibility of various forms of tourism with other components of the local economy; the quality of development, both culturally and environmentally; and the divergent needs, interests, and potentials of the community and its inhabitants'.

Murphy (1980, p366) also encouraged community-inclusive tourism planning at the early stages of tourism development because of the possibility of



mutual and consensual decision making and opinions which helps to allow for a broader planning objective. His research (1980, 336) showed that 'the willingness of the residents to participate and their ability to develop rational and practical options'. This confirms that planning tourism need not remain the realm of the expert alone; given the chance, the public can provide a useful input into the decision-making process.

Haywood (1988) supports this view because he observed that the direction of tourism planning and management has a direct and intense impact on the host community and on the nation's economic, social and ecological welfare. He states that where fast tourism development is concentrated within any area at any particular time so much so that it becomes a tourist-based economy, community life patterns are disrupted, environmental damage increases and when the government and industry players choose to ignore the voices from the community, then there will be changes amongst the community in welcoming tourism in their areas. There will be greater dissatisfaction and discontent expressed by the local host community whose tolerance level for such an activity is lowered. This leads to unconstructive and sour relations between the host and visitor. It is at this point in the life-cycle of the industry that it reaches its zenith and declines with negative consequences (Haywood, 1988, 105)

Sustainability in tourism is linked to participation that in turn is linked to stakeholders and therefore is linked to dependency. Pretty's (1995) participation development model illustrates the diverse forms of tourism participation. He offers a spectrum from the more common passive and incentive driven participation to the more interactive forms of participation. In the more passive forms of tourism participation, tourism development is more superimposed on the economy and society in a 'top-down' manner. There are however various limitations to this model. It excludes various factors such as: local concepts of decision-making; the capacity of the local people to create their own enterprises; the increase and spread of new skills which will broaden the effects of participation outside of tourism; and spatial and temporal variations that are dependent upon a range of factors e.g. age,

gender, level of education and ethnicity. To this end, alternative models must be developed which include the above.

A concern for local community involvement in tourism development in their immediate areas should not simply be limited to whether or not they should be involved but rather how they should be involved and if the level of involvement and participation necessarily leads to or even means excising control over the tourism activity itself (Mowforth and Munt,1998). They also highlight the tendency of host local communities to fight over power and control issues over the available tourist activities and financial remunerations.

Koch (1997) believes that there are various constraints to fruitful and active community involvement in tourism ventures. Although his study was based on South Africa, the points he proposes are applicable in a broader sense to all local communities which are undergoing tourism development. Koch pointed out that communities cannot participate fully because they lack ownership over natural resources and also land ownership. Thus their collaborations will be limited to joint ventures with outside developers. He also highlights the fact that at local community level, there are operational issues involved which limits their tourism venture options because they do not have the necessary skills, know-how and resources to drive these activities. Furthermore, he stresses that tourism infrastructure development for attractions and facilities requires capital and this may be a problem for the poor communities to gain access to. Lastly, he highlights the potential for internal conflict and competition within the usually heterogeneous community whereby the varied interest groupings may contest each other for lucrative tourism venture opportunities.

Scheyvens (1999) presented an interesting framework which was extended from Friedman's (1992) work for assessing the extent of empowerment of communities which are involved in tourism. She proposes four basic dimensions of empowerment: economic, psychological, social and political empowerment. Each dimension has both a positive sign of empowerment and a sign of disempowerment. The researcher found this framework valuable in

that it presented an overall concept of empowerment which communities feel as a host nation in tourism development. The researcher however finds that in Brunei's context as a Muslim Monarchy, another dimension may be applicable. This is ideological positive and negative empowerment or disempowerment.

With regards to the strategies adopted by NGOs to support community involvement in tourism, much of the work has focused on six main strategies as espoused by various writers such as Bah (1999/2000), Gurung (1995), Joppe (1996), Mann (2000) and Scheyvens (2002). These strategies relate to policies and plans that aim to: provide information and increase awareness in the communities, build adequate capacity and increase confidence amongst the communities, establish effective networks, encouraging responsible tourism practices within the industry, promote and support responsible tourism behaviour and practices among visitors into the host community; and finally to implement conservation and development plans.

The researcher was attracted to the Kinnaird and Hall's (1996) suggestions that gender-aware tourism is a necessary tool for effective tourism management. They suggested three reasons as to why gender-aware analysis of tourism is required by all host nations. The first put forth is that all the activities and processes in tourism development basically stem from gendered societies. The gender that dominates the host nation is shown and articulated through visible manifestations of either a masculine or feminine identity within the society. These identities are then conveyed by the host destination which is an important component of how tourism development occurs within the nation itself and on the types of tourism offered. This is also applicable to the articulated identities of the guest society which also impacts on these processes.

The second reason for a gender-aware analysis of tourism is that 'gender relations both inform, and are informed by, the practices of all societies' (p96, 97, 98-9). They suggest that all dimensions of tourism-related activities and processes from socio-cultural, political, economic and environmental aspects

interrelate together with either the masculine or feminine nature of each individual society. This interaction also extends to how gender relations are continuously interpreted over different periods of time thereby giving different definitions, meanings and redefinitions.

Their third proposal relates to how power and control dimensions shape and mould gender and gender relations within the society. Here, the writers explained that 'gender relations are political relations at the household, community and societal levels. Identifying tourism as an industry based on the economic, political or social power relations between nations or groups of people represent an extension of the politics of gender relations. Therefore the writers concluded that tourism revolves around the social interaction and social articulations of gendered motivations, desires, traditions and perceptions (p96, 97, 98-9).

### **3.8 Local Tourism Planning in Brunei**

There is very little published literature which specifically focuses on Brunei tourism. Baum and Conlin's (1997) work focuses on the impact of the Islamic ethos on this country and describes this country as a reluctant host. More recently, two articles have appeared in a regional journal, in the Sabah Economic Review. Tan and Omar (1997) presented their findings on an analysis of the growth of hotel and tourism-related accommodation in Brunei. Ahmad's (1999) work highlights the perceived benefits and disbenefits of tourism development amongst the Iban and Dusun tribes who reside in the Tasek Merimbun National Heritage Garden. Here he found conclusively these two ethnic communities believed that tourism development was an important part of their livelihood but they were aware of the potential for environmental and cultural degradation. He also proposed an innovative ecotourism development model for Brunei and suggested that the ethnic groups should be allowed to have greater control and ownership of the tourism products.

Locally, there has been greater interest in academic writing in this multidisciplinary subject as evidenced by the publication of three tourism

related articles in 'Readings of the Brunei Economy' (Tan and Duraman 2002). Previously, there was only an unpublished undergraduate dissertation which has focused on an aspect of the tourism industry. Yusuf's (1997) undergraduate dissertation was a study of inbound tourists and tourism development in Brunei. Here she also focused on their tourism expenditure. The problem now is that this investigation was carried out in 1992 when there was no real governmental interest in pursuing tourism as a truly viable industry. Since then, there has been no empirical investigation into the characteristics and nature of tourists coming into the country.

There are many gaps in knowledge which must be addressed in this industry which may be valuable to create a clearer picture of tourism in Brunei. This knowledge is beneficial to tourism practitioners, academics, industry players and students alike.

The writer feels that the information released by the government and other relevant bodies are not up to date. Therein these gaps, lies the value of this research because it will address a specific dimension of tourism development in Brunei. This study focuses on addressing the content and context of this industry in greater depth by analyzing its tourism stakeholder management policies and by elucidating community perceptions on the first national launch of 'Visit Brunei Year 2001'.

Tan (2002) focuses on presenting the broad context tourism development in Brunei and its problems. Jamaluddin (2002) on the other hand chartered the development of tourism policy, planning and development from the governmental point of view. Another article by Yussof and Tan (2002) focuses on the management of the national airline, Royal Brunei Airlines, and the challenges which it is facing such as inefficient management, low growth and lack of market competitiveness.

The national and official philosophy of life in Brunei is known as the 'Melayu Islam Beraja' (MIB) or the 'Malay Islamic Monarchy' concept. This philosophy of life has been the backbone of Bruneian society since the reign of its first

Bruneian Malay Moslem Monarch, Sultan Muhammad 1 in 1363. However, it was only in 1984, under the reign of the present 29<sup>th</sup> Sultan of Brunei, Sultan Hassanal Bolkiah that this concept was firmly established as a national philosophy.

His Highness decreed on Brunei's First Independence Day, 1<sup>st</sup> January 1984, that "....Negara Brunei Darussalam with Allah's gracious will, shall forever be an independent and democratic Malay, Islamic Monarchy, based on the teachings of Islam according to Sunnah Wal-Jemaah and which will be governed in fairness, trust and freedom..."

Cleary and Wong (1994) attempts to define the MIB concept as being 'based, first and foremost, on the centrality of history and tradition. Brunei, it is argued, has a long history as a sovereign state with one of the oldest royal families in the region. It is a Malay, Islamic state adopting Islam at an early stage and committed, not to a multi-ethnic model of political and economic development as in the case of Malaysia but rather to a unique Brunei Malay culture and polity...Integral to this philosophy is the unquestioning position of the Sultan as ruler of the state, the centrality of Islam to the daily life of Brunei and an inherently cautious attitude to western ideas and values. MIB is seeking to establish a political and social philosophy which remains open to some aspects of the West (in this respect it is not fundamentalist in ethos) whilst continuing to be anchored to a Malay conception of monarch and people'.

As Brunei has chosen to go down the tourism pathway, it has to do so in a culturally and ideologically acceptable manner. In attempting to formulate an MIB's perspective on tourism, it is necessary to dissect these three components and look at their individual perspectives on travel and tourism. The first and most important component in MIB is the Islamic doctrine.

Many ideologies and cultures are open to the idea of going away on a 'holiday'. This tradition dates back to when people would literally go away to spend quality time on a 'holy' day to perform some form of worship, at the advent of their journey, during transit time and at the destination itself. In time,

many tourist destinations themselves became intrinsically linked to cultural and religious elements. Over time, western terminology assigned the travelling phenomena as 'tourism'. It is this western perspective of 'tourism' that is predominantly used. Tourism in this context is one that is also rarely mentioned in Islam.

Vukonic (1996) observed that 'Islamic theologians find it difficult to reconcile Islam (if they do so at all!) with "western contents" of tourism, stressing rather its spiritual and social dimensions' (pp103). Din (1989) summarises Islamic views on 'modern tourism' as one which is wary of its negative impacts which encourages relaxed moral standards through the encouragement of sexual permissiveness (e.g. topless bathing on beaches) as well as through the demand for un-Islamic supply side tourism dimensions such as drink and gambling and so forth.

Din (1989) also defines travel in Islam as 'an instrument for fostering unity among the Ummah (Muslim community). Islam de-emphasises profligate consumption characteristics of modern tourism and enjoins genuine, humane, equitable, and reciprocal cross-cultural communication. The journey in Islam is of part of a larger journey in the service of the ways of God' (pp554).

Islam as a religion itself encourages travel and has a close relationship to the concept of tourism. The motivation and action of travel to culture close understanding with others is termed 'litaarafu' (Al-Hujurat, verse 13) and has a very wide implication on self-analysis through communicating with others as well as recognising the sublime work of the Creator. The physical sustainability of a beautiful natural environment is undeniably one of the greatest resources of the tourism industry. To travel to appreciate this is in itself an act of worship to Muslims.

Islam is very familiar with the concept of 'hospitality'. As in most religions including Christianity, Islam regards hospitality as a religious commitment. In Islamic context, hospitality as a commitment (ibadat) lasts for three days and any extensions beyond that three days is regarded as a charitable act

(sadaqat). Both host and guest are enjoined to treat each other with respect and tolerance for the duration of the visit, all of which are characteristics of good hospitality.

Modern Malay perspectives on tourism must be viewed from a historical dimension. Traditionally, Malays are a race of seafarers and ancient Brunei served as an important seaport in Asia with a very active sea-trade. The concept of travel and hospitality was therefore already well known to Brunei Malays because they were the host community and were used to accepting foreigners. Malay motivations to travel then were either for business or to spread Islam. Numerous accounts exist of the foreign travels of Brunei's past rulers. Sultan Bolkiah, the fifth Sultan of Brunei, in the 15<sup>th</sup> century was famous for his foreign explorations and was reported to have reached as far as China it can be seen that Malays already have a thirst for travel.

The advent of international travel for modern Malays began in earnest when the national airline was created in the 1970s. Although no research has been done to ascertain modern Malay motivations to travel, it is accepted that 'shopping' as an activity is the primary motive to travel. Comparisons may be drawn from the past because ancient Malays also travelled to purchase goods either for resale to the local market or for personal use. Malay travel is generally limited to intra-regional travel to countries, which offer extensive and cheap shopping facilities such as Singapore and Malaysia. It is thought that the average Bruneian family will prefer to go on shopping holidays as opposed to leisure. On the other hand, the younger and more educated Bruneians (especially those educated abroad) appear to fall into the 'leisure-seeker' segment of the tourism market as opposed to just 'shoppers'. They appear to be more consciously leisure-oriented than the former.

As a result of the external travels of the Bruneian Malays, they become more exposed to the concept of 'tourism' as defined in western terminology. They become more aware of the negative effects of mass tourism on a host community; yet, at the same time they remain protective of their own society and are not supportive of the idea of developing tourism in Brunei.



Furthermore, many Bruneians felt that the country itself lacked the necessary resources for tourism.

The final component of MIB, 'Beraja' (Monarchy), must also be analysed in terms of its relationship to tourism. The monarchy represents the government and it was also the upholder of the MIB concept, which emphasised the duty of care, which under Islam is 'amal makruf nahi munkar' (to enjoin good and prohibit evil). Tourism has always been recognised, as a potential economic diversification measure in Brunei but the government did not show clear signs of either supporting or discouraging tourism development. The government in recognising the 'evils' of tourism was concerned with protecting its community from the potential negative socio-cultural and environmental impacts of tourism, which will be felt within its community if tourism development was pursued.

It was also very conscious of its lack of tourist attractions demanded by the mass tourist (e.g. sandy beaches and entertainment spots). The ambivalent attitude of the government sent mixed signals to the community. The tourism industry remained extremely weak and small in Brunei because of the lack of government support in developing tourism as a viable industry, whereas the general public remained closed to tourism development.

It is also the nature of Brunei Malays, like most other South-east Asian races, not to question the authority. As aforementioned, there is a general and unquestioning acceptance of governmental prerogative and actions. It was only in 1996, when the Sultan made a royal decree to develop tourism in the Seventh National Development Plan that the general population formally accepted the proposal. However, tourism development in Brunei was very sluggish initially and it was only in the past year that major developments have occurred.

Under the MIB ethos, it may be concluded that an official perspective on tourism is influenced by three inter-related yet in some instances, diametrically opposing notions of travel and tourism. It may be seen that tourism as an

activity is generally accepted by the Bruneian Malay but was formerly limited to outward-bound travel. Bruneian Malays are wary of the immoral activities demanded by mass tourist and of the undesirable negative impacts of tourism. The MIB perspective is arguably one of caution with regards to tourism (Baum and Conlin, 1997). However, on the other hand, it may also be seen as conducive to sustainable tourism development (Zulkifli, 1995) because the MIB concept is seen to be the very defence mechanism, which will protect its population from excessive negative socio-cultural and environmental effects though selective and controlled tourism development.

### **3.9 MIB perspectives on tourism planning**

The MIB concept has been actively implemented in all aspects of governance in Brunei. Economic planning and development has occurred around these tenets. In recent years, more royal decrees have been made which has given rise to increasing participation from religious leaders in developmental impetus. In a nutshell, the fundamentals of Islam are the very drivers of change. Together as a trio, the MIB philosophy forms and shapes the dynamics of change in this small nation. In tourism planning processes, both religious and government leaders are heavily involved in the planning to ensure that the 'MIB' concept is implemented and upheld in this particular push to achieve economic diversification.

Marketers recognise tourism 'as a service' (Mazanec and Calantone, 1991), whereas economists regard tourism as an 'industry' (Eadington and Redman, 1991). It is arguable that due to religious participation in tourism planning, its official planners may adopt an alternative perspective to tourism as 'a social responsibility or commitment' and not simply as a means to achieve economic development.

The development of the tourism industry to derive a source of 'halal' ('permissible') income has been allowed by the Brunei Government. That is why the government has decided to concentrate on the ecotourism and cultural tourism sector. Ceballos-Lascuráin (1996) defines ecotourism as an

'environmentally responsible, enlightening travel and visitation to relatively undisturbed natural areas in order to enjoy and appreciate nature (and any accompanying cultural features both past and present) that promotes conservation, has low visitor impact, and provides for beneficially active socio-economic involvement of local populations '.

However, viewing it from economic terms does not endorse any hedonistic activities characterised by 'mass tourism'. This industry must be planned developed and conducted 'Islamically' to respect the fundamentals of this religion. The main focus is to ensure that the Islamic philosophy of life is not desecrated. For example, the government wishes to avoid the commercialisation of religious events as observed in Hawaii where once sacred religious dances are now being performed for tourists' revenue.

Considerations such as restrictions such as no alcohol consumption, respectable dress codes, and food regulations amongst others also apply. These restrictions actually limit the kind of tourism activity that is permitted in Brunei. It is more logical for Brunei, being an Islamic state to pursue 'niche' market tourism such as cultural and heritage tourism and eco-tourism, all of which when planned and developed properly, can encourage the ideal 'tourism' experience.

Tourism in Brunei must be planned in a controlled, strategic, meaningful and participatory manner if sustainable development is to be achieved. There is an obligation to promote sustainable business practices morally, ethically, socially, culturally, and environmentally throughout all sectors. There must be shared decision-making among stakeholders.

So conceptually, there is an interrelationship between MIB and tourism planning. This area merits further research because it can help to gain a more meaningful insight into how Brunei as a developing nation has chosen to plan and develop their tourism industry within the acceptable boundaries of its religious philosophy. It will also be challenging to investigate the problems of

tourism planning under an Islamic ethos. However, this is beyond the scope of this thesis.

### **3.10 Summary of Literature Review**

The purpose of this research is to explore the context and content of tourism development and management in Brunei Darussalam. This is a broad topic encompassing socio-economic, cultural, political and environmental factors. Hence for the purpose of this research it was necessary to look at a broad spectrum of dimensions relating to tourism. This is made even more complex because the researcher is interested in the perceptions of the host community in developing this particular stream of development.

In terms of research, this study has illustrated themes within the Bruneian tourism context, which may or may not be similarly experienced in other countries with a fledgling tourism industry. Tourism literature on ASEAN countries is scarce. Literature and data on Bruneian tourism is even scarcer. There is therefore a need to broach this subject within Bruneian context to fill in the knowledge vacuum.

This study adds to the current knowledge-base for tourism in Brunei, the region of South East Asia and also for other Muslim countries which are undertaking tourism activities. The researcher has tried to provide a framework that is applicable to the Muslim Malay community, which is finding it difficult to reconcile ideology with the components of tourism. The researcher has attempted to interpret the data to present the range of issues that concern Bruneian tourism planning, development and management which affect the impacted stakeholders from the community, national tourism organization, tourism-related businesses, tourists and the environment.

The researcher is in an excellent position to know some of the characteristics to tourism development in Brunei already because she herself is a local Bruneian Malay. Therefore the researcher already had some understanding of the content and context of these developmental processes. First and

foremost, the researcher is well aware of the socio-cultural context which tourism can occur in Brunei. This small host nation shares a similar patriarchal society to other Southeast Asian nations. The fact that is a Muslim state means that it draws similar comparisons to Saudi Arabia, a rich Arab nation with an Islamic ideological system of governance and living.

Some writers such as Gunn (1993) acknowledge that it is the failure of tourism planners, developers and managers in properly and systematically managing and planning the tourism industry that has lead to indecisive policy direction and incomprehensive development strategies. This is the basis of many failures as experienced in many countries.

### **Section 3.11. Introduction to Research Orientations or Methodologies**

This section provides an explanation of the research orientation of the study, which utilized both qualitative and quantitative methods. It outlines the rationalizations as to why the researcher utilized such methods. An explanation of the details of data-collection methods, its mutually reinforcing relationship and data analysis is also provided. This concluded with a discussion highlighting the problems encountered by the researcher in the course of this fieldwork.

#### **3.11.1 Research Orientations or Methodologies**

Tourism research has traditionally been qualitative as opposed to quantitative because of the philosophical assumption, which grounds this field in social sciences where the former method has been traditionally undertaken and employed. The researcher has personally constructed her own combination of methodology to suit the research study and its needs, the nature of the objectives and perspectives. This researcher believes that using both qualitative and quantitative methods would lead to data-enrichment and thus greater validity and reliability of findings in this study.

The researcher employed qualitative methods of research namely in-depth semi-structured interviews, non-participative ethnographic study and informal conversation at various stages of the study. Tourism in Brunei is a multi-dimensional experience for people. The researcher believes that this method was suitable because one's reality or perception of reality is a highly personal and subjective experience. It is a highly personal experience depending on the nature of the context of one's reality, its meanings from political, economic, technological, social and cultural dimensions.

One cannot put a numerical value to this experience, which makes quantification impossible. The research entails finding the opinions of selected stakeholders via in-depth semi-structured interviews, which has to necessarily be from a small sample. This approach did not consider the need to get a representative sample as the issue of representativeness in sampling was resolved in the tourism questionnaire.

The researcher used the qualitative method because it enabled the interviewees to express their 'social reality' in their own words. It was felt that qualitative methods were more applicable in the research investigation as it requires greater subjective and qualitative information of emic (insider) views. The ethnographic approach is very appropriate to this study as it enabled the researcher to gain a deeper understanding of the meanings of this tourism phenomenon in its natural settings.

The intention in this research was not to test existing theory but to see the scope for research and to investigate the 'real world' situation of Bruneian tourism. This is another reason as to why qualitative research methods were used. It was important that the researcher find the values, meanings and significance of tourism amongst Bruneians, which justified the use of qualitative research methods. The qualitative method helped to unveil specific local contexts and information applicable to the individual. This it enabled the researcher to uncover new themes or dimensions of inquiry, which is not afforded in quantitative study.

The researcher views the cultural context of Bruneian society as a 'silent society' in the sense that the accompanying subtleties in one's body language convey a 'thousand words'. This can signify or convey different meanings to one's spoken language or to what has not been said. All these special tones and nuances are value-adding components to the meanings of the verbal and spoken language. This special interaction would have been missed if the researcher had opted solely on a quantitative approach thus justifying the use of qualitative research methodology.

Tourism research in Brunei is very much an area, which has received very little investigation because it is a new and emerging industry. Due to this lack of study and research, there are very scant descriptive details about this industry and it is very difficult to provide generalised information relevant to this subject. Therefore the researcher felt that it was very appropriate to employ qualitative methods in this study to gain a basic and descriptive overview of this contextually unique environment before one can even attempt to test a pre-conceived theory or hypothesis in this industry. To this extent, this study may be the basis for future research as the findings may contribute to new paradigmatic thinking or theorisation, hypothesising or postulations about tourism development, planning and management in small Muslim states.

Quantitative methods namely survey questionnaire was also adopted. The researcher believes that these methods are complementary to each other despite difference in their philosophical assumptions, conceptual, epistemological, and methodological dimensions. The researcher believes that it is appropriate to use both methodologies, as they are applicable in different contextual situations. The use of both methods would enable a holistic study of tourism research in Brunei and would perhaps show data which is mutually reinforcing.

The quantitative method was used because of the nature of the problem itself. The research study is designed to gain an insight into community perception

of tourism in Brunei. In order to measure this, a method that would offer high levels of quantity and objectivity, had to be used.

The quantitative method was useful because it provided general data, which represented a broader source of community viewpoint. The objective was however not to test a hypotheses or *a priori theory* rather to see if new lines of inquiry might emerge. The objective was to search for general themes via frequency distributions and using these themes to provide an explanation for the tourism phenomenon in Brunei. The questionnaire also enabled the researcher to build on this 'generalisation' of community tourism perception in Brunei through the open-ended section, which allowed questionnaire respondents to give their own comments pertaining to the research matter.

### **3.11.2 The Data Collection**

The broad research questions has been both identified and disaggregated in Chapter 1 (p.8), and all the issues noted the underpin the various forms of data collection. Indeed, the research design of this study involves the following elements: working design, working hypotheses, data collection and data analysis and interpretation. As this study intends to analyse perceptions of current and future tourism development in Brunei, the researcher believes that both qualitative and exploratory approaches are appropriate. Babbie (1989) suggests that a good option to approach this exploratory study would be the adoption of snowball sampling, semi-structured interviews, and a qualitative data analysis process. This in turn will yield findings, which will provide a basis for understanding and thus the generation of hypotheses and theory formulation.

The snowball sampling technique is extremely useful to study a loosely organised group of people (subjects), in this case the perceived tourism stakeholders. The term "snowball" is used to describe the sample that begins small but increases in size as it 'rolls' along. The snowball technique allows the researcher to identify a few subjects, interview them and request for



references of other people for the study before the whole process is repeated. This interview-reference process has the benefit of allowing the researcher to trace the industry network, which creates a bigger set or web of organisation that the people belong to. The sample in this study consists of the BTDU, hotel, travel agency operators, community members and so forth.

The starting point of the research was from the BTDU. Here, the researcher requested the assistance and cooperation of an explicit tourism stakeholder and asked the participant to recommend ten other people whom they perceived as fellow tourism stakeholders in Brunei. These recommended people were then contacted to seek their willingness to participate and contribute towards this research. Those who agreed to participate then offered the names of ten tourism stakeholders and so forth. The objective here was to see the scope and breadth of the nature of tourism stakeholders in Brunei. The researcher was interested to see if certain names or certain identities were repeatedly offered which hinted at their extent and level of involvement in tourism development in Brunei.

In the end, the researcher was able to invite twenty-five interviewees to participate in this study from a variety of sectors. The anticipated large number of interviewees was not achieved because of a variety of reasons such as participant apathy, busy schedule, embarrassment, lack of perceived knowledge and so forth. These problems will be discussed in a later section. The interviews were conducted from the beginning of October 2000 to early February 2001.

Once the names of stakeholders were provided, the researcher attempted to contact these stakeholders via the telephone to invite their participation in this study. The researcher attempted to invite those whom she felt would contribute most to the study from a variety of segments e.g. education, hoteliers, travel agents, businesspersons, national tourism organisation, the village leaders, community members and so forth. The researcher carefully observed the following ethical consideration in the interviews:

At each stage of the research, participants informed of the following: the *raison d'être* of the investigation, objectives of the study, what it involved and the nature of participants involved the duration of the study. The researcher gave her strong reassurance of participants' rights to confidentiality and anonymity. The tapes would only be accessible to the researcher. Participants were reassured that the data collected would only be used for investigative purposes only and for no other reasons.

In the interview, the participants were asked if they would like to read the research questions, which served as interview guidelines before the interview commenced to allow them to gather their thoughts. The researcher attempted to establish a friendly rapport with the interviewees at the onset of the interview before asking the questions to help ease the situation. The researcher started the interview by asking simple, general and non-threatening type questions first and led up to the more difficult and reflective questions later.

The researcher allowed and encouraged the interviewee to discuss in a free-flow manner the issues being investigated to gain a deeper insight of the research topic. The researcher minimised her communication to the interviewee during these sessions so as to limit any negative interviewer impact on the participant such as undue influence by interviewer opinions, natural curiosity, prejudices and so forth. The interviewee was then asked if they would like to have a copy of their interview transcripts to confirm that the researcher's interpretation of their opinions were correct and consistent with their own subjective perceptions. The other purpose to show them the transcripts was to allow the interviewee to clarify any points, which were unclear to the researcher.

The researcher also used free-flowing conversation to gain data on tourism in Brunei. This method was not restricted by rigid semi-structured interview questions but was more open-ended and informal. This method was employed during the ASEAN Tourism Association Forum in January 2001 when the researcher was able to participate as an observer on the Brunei

contingent in the tourism meetings, which focused on ASEAN tourism issues. This method was employed because it was not feasible to conduct formal interviews during that time with tourism representative from the ASEAN countries.

The researcher was also invited to act as observer at a medium level meeting between the Head of the District Office, the Brunei Tourism Department and *penghul-penghulu mukim* (chiefs of sub-districts) from the four districts. This meeting was held on 20th November 2000. The researcher's role was purely non-participative although her presence was acknowledged in the meeting. The researcher simply observed the proceedings of the meeting and maintained minimum communication with the delegates of the meeting to minimise her presence, which may affect the behaviour of the sample being observed.

The researcher also undertook documentary analysis of the tourism Masterplan, electronic discussion (online) forums on Bruneian tourism, newspapers. This was conducted because the researcher acknowledges the richness of the data that may be gleaned via these media as often one's personal value systems, beliefs, attitude and thoughts are explicitly stated and recorded under or without the guise of anonymity.

As the study sought to gain a general overview of community perception towards tourism development in Brunei leading up to Visit Brunei Year 2001, the researcher felt that a more quantitative research methodology was needed. It was concluded that a questionnaire would address this problem of getting a wide response at local level at all four districts in Brunei. The researcher aimed to obtain 500 usable questionnaires for this study and had deliberately avoided setting a maximum limit of response rates.

The objective was to gain the highest response rate as possible. The researcher felt that the larger the response rate, the higher the probability of getting a more representative community outlook on tourism in Brunei. As Brunei's population is approximately 330,000 people, a response rate of 500

would effectively mean that 0.15% of the population had participated in the research. The research findings would indeed be a valid representation of the community's viewpoint. In the end, a total of 465 usable questionnaires were obtained. This meant that a 93% response rate out of an anticipated 500 usable questionnaires was achieved.

The survey questionnaire required four revisions before a final pilot draft was reached. These revisions were carried out to rectify the following: simplification of difficult terms to simpler words, clarification of ambiguous questions, elimination of leading and double-barrelled questions, inclusion of an open-ended section to elicit respondent views and reformatting the questionnaire design for ease of answer selection. The English version was then translated into the Malay language by official government translators, which required extensive translation, modification and simplification before the final pilot draft was approved by Malay linguistic academics at Universiti Brunei Darussalam.

The questionnaire was piloted in October 2000 and distributed to fifty respondents from the community. The researcher had carefully selected four graduates from the Universiti Brunei Darussalam with research skills and rigorously trained them to administer the questionnaires in both the English and Malay languages to the general public. The respondent rate was 100% on this pilot questionnaire. The first questionnaire trial run enabled the researcher to undergo further item improvements such as making further clarification or changes to suit the community's level of understanding.

In the last few months of 2000, the questionnaire was administered person to person by both the researcher and four research assistants allocated to her project by Universiti Brunei Darussalam.

As noted earlier, this operation eventuated in 465 completed and useable questionnaires, this questionnaire having been applied in all geographic areas of the country. Participants were approached in public areas on an opportunity basis and asked if they would be prepared to complete the

questionnaire, and all who agreed became part of the questionnaire sample. It should be added that the researcher herself and three of the assistants were women and this has probably given rise to an over-representation of women in the sample, also of women who were fairly young and well educated. There is however, a benefit to this convenient sample in that those surveyed did evince a real interest and had the education to support their participation.

### **3.11.3 The Problems of Research Fieldwork in Brunei**

The researcher experienced some problems in undertaking this study, some of which were fortunately easy to overcome. First and foremost, with regards to the in-depth interview, the researcher felt that despite getting 25 interviewees to participate in the study, it was disappointing that a high number of recommended stakeholders failed to participate in the interview. The stakeholders gave various reasons for failure to participate including busy work schedules.

This was a logistical problem, which lead to many unproductive days, as the researcher was on 'stand-by' on many days whereby a potential interviewee would either confirm or cancel an interview at short notice. The researcher spent many days simply contacting people and trying to get their agreement to participate in the interviews. This was not an easy problem to overcome but one which the researcher had to tolerate as their participation would be invaluable to the research.

The researcher also felt that a sense of apathy amongst the recommended stakeholders was also an obstacle to interviewee participation. Some felt that the outcome of the research would not have any affect on the industry or be of much use at all. It was felt that some Bruneians do not regard that anything constructive can be done to assist this industry despite a formal research being undertaken to form a clearer picture of tourism in Brunei. Perhaps they do not see that their voices and opinions carry any weight in the right circles

thus justifying their lack of commitment to participate in the study. This lack or indifference was a problem because valuable information could not be obtained which may be of significance to this industry.

Certain behavioural traits also had an impact on interviewee participation. Humility and humbleness are traits that are admirable human characteristics but the researcher felt that this has to a certain extent negatively progressed to inferiority complexes amongst some Bruneians. Some potential interviewees explained that they were too shy to become involved in the study and that they lack the necessary knowledge to be able to contribute to the research. Some stated that they were simply too 'inexperienced' at being interviewed.

It was also found that quite a few women who had vested interests in the tourism industry and were themselves tourism practitioners politely recommended that the researcher seek the co-operation of their more senior male colleagues whom they felt were more 'equipped and more knowledgeable' to assist the researcher. The researcher felt that this 'self-imposed' belief that men were more knowledgeable than women was not constructive in gaining a broad and representative viewpoint of tourism stakeholder perception.

The researcher had hoped to gain an overview of tourism perceptions, which was equally distributed amongst genders as opposed to being heavily gender-biased towards the male gender. The researcher overcame this problem by explaining to the female potential interviewees that their input was also necessary and was of great contributory value to any research that is being undertaken because the female perspective is more sensitive to men's and thus presents a different dimension to the same problem.

In these instances whereby the researcher was unable to gain stakeholder cooperation, the researcher had to resort to being pushy to cajole more stakeholder involvement. In western society, being 'pushy' is translated as being 'assertive'. However, behavioural traits are socio-culturally influence

and being 'assertive' is seen as being 'forceful' and 'aggressive' in traditional Malay society, traits which are perceived negatively, especially if they were traits in Malay women. This tactic had to be employed because the researcher required input from the stakeholders. In some cases, this tactic worked. In others, this proved to be unsuccessful. This illustrates how behavioural aspects can affect the interview process.

Another socio-cultural problem, which the interviewer encountered, was the 'fear culture' amongst many Bruneians. This misplaced fear stemmed from the belief that the government can enforce disciplinary action on any Bruneian who was seen to be 'difficult' or 'demanding' by voicing their dissent or discontent. The government does not look upon public criticism favourably

Language was also a barrier in this research. The English medium is widely spoken by the educated Bruneian. However, the older generation is more often than not less educated and has less English proficiency. This is true of many village elders who represented their villages some of whom were seen as stakeholders and active actors/participants in this industry.

Despite being bilingual, the researcher found it problematic to translate the more difficult terms used in the interview questions into the Malay language and to converse with the older generation in traditional Bruneian Malay language, which is a finer language linguistically and in certain contexts have deeper meanings. The researcher overcame this problem by transcribing the entire interview or conversation after the event and to ask the interviewee to clarify the points which needed clarification from the researcher's viewpoint.

Another problem encountered was effective translation of interviewee body language. The hidden meanings communicated behaviourally were sometimes in contradiction to the verbal communication. The researcher attempted to interpret these non-verbal cues (either explicit or implicit) to match the meanings of the verbal cues to elucidate the truth.

The author is well aware of interviewer bias whereby the interviewee projects answers which the interviewer wants to hear through asking leading questions to the former. The author has been careful to avoid doing this to ensure that the data found is unbiased. However, the author suspects that it is highly probably that the cultural tendency of 'saving face' (safeguarding one's integrity and honour) is also a constraint in getting honest answers.

It is culturally unacceptable to hang one's 'dirty laundry' out for the public to see especially when one has to be critical of one's own organisation or in effect to admit to one's own limitations thus it is likely that some interviewees may have deliberately presented a glossier or more palatable version of their reality to the interviewer. This has adverse effects on the validity and reliability of the data found.

However, many of the interviews and questionnaire distribution were conducted during the fasting month of Ramadhan. This month has a deep significance for Muslims and have spiritual and moral implications for the Muslim participants. Not only do Muslims have to abstain from drinking and eating during day but they also have to abstain from immoral or unethical behaviour. The researcher trusts that the interviewees and questionnaire respondents had acted properly and were indeed candid and honest in their opinions throughout the study but especially more so during the fasting month. The researcher expects that this will minimise the risk that the data is invalid and unreliable.

During Ramadhan, the country as a whole operates a different work schedule to honour the fasting season and to help make it easier for its local Muslims to observe their fast that commence from dawn until dusk. This proved to be a challenge for the researcher in that it was found that the research assistants were unable to carry out their research as effectively and as efficiently whilst they were fasting. This was not because they were too tired to perform their duties properly but because of the reasons which shall be discussed below. These concern religious and family commitments.



In Brunei, during Ramadhan office hours are reduced to five hours from the normal eight hours. The research assistants not only had fewer hours to distribute the questionnaire but also less people were interested in contributing to the study. This was an operational problem that was overcome when the fasting season was over. However, the rate of questionnaire returns was also impeded post fasting season because this was followed by the festive season of Syawal. The disruptions to fieldwork during this month shall be discussed at a later stage.

Thus both religious and family commitments had to be considered in this matter. One research assistant refused to work during the month because he was involved in mosque activities throughout the month of Ramadhan. It is normal for Muslim men to spend much of their time in the mosque observing their fast and performing other supplementary religious activities such as prayers, reading the Holy Quran and so forth.

The month of Syawal is the month whereby Muslims celebrate the completion of their fast. The typical celebration lasts for days and may extend to the whole month. During this month, especially in the first few days, family members, relatives and friends rejoice and celebrate by holding 'open houses' where food and beverages are enjoyed. These open houses are truly open in the sense that all members of the public are welcome.

Once the official holiday period is over, this seasonal celebration extends to 'open house' lunches and high teas during and after office hours. The holiday mode in the country affected the rate of research undertaken because respondents became pre-occupied with strengthening family and friends relations by attending such functions.

The months between October and January are the flood season. This was a logistical problem for the researcher. Some of the interviewees who agreed to participate in the study lived in rural areas, which were severely affected by the floods. Usually, even in the dry season, the only way to reach these

people was by boat. The seasonal flooding meant that they were even more inaccessible. The researcher tried to organise telephone-interviewing sessions but this proved to be unsatisfactory as the sound quality of the conversation was affected by the rain and flooding. In some cases, the interviewees were unreachable even by telephone due to telephone line failures.

In the end, for safety reasons the researcher had to wait until the drier season until she was able to reach them for interviewing. The researcher reached the interviewees by people-carrier boat which were fondly called 'flying coffins' by the general public in view of its lack of on-board safety measures (e.g. availability of life vests), and flimsy build. The researcher felt that the trip was justifiable because the experience and non-verbal data findings of a face-to-face personal interview situation would help in the interpretation of the subjective data.

The problems encountered by the researcher in her fieldwork are themselves socio-culturally revealing. To the western eye, the typical Bruneian's viewpoints on socio-cultural, economic and political issues may be deduced by simply referring to these problems.

Notwithstanding the problems encountered in getting interviews to participate in this research, the author feels that 25 participants are adequate to gain an in-depth emic viewpoint on tourism development in Brunei. The objective of the study namely to gain a broad overview of stakeholder perceptions on tourism was thus achieved. The objective to gain an understanding of community tourism perception was also achieved when 465 useable questionnaires were obtained that contributed positively towards the data findings of the study. With this chapter, we have set the scene for reporting the data findings in subsequent chapters.

## **CHAPTER 4**

### **DATA PRESENTATION AND KEY FINDINGS: SURVEY QUESTIONNAIRE**

#### **4.1 Introduction**

This chapter presents the research findings related to the questionnaires distributed amongst the community from Brunei-Muara, Tutong, Temburong and Seria. The objective was to gain as many completed questionnaires as possible within the time period specified prior to the official launch of Visit Brunei Year 2001. An open-ended section was also provided for respondent comments. In total, 465 questionnaires were obtained and subsequently processed for analytical purposes. Only 170 respondents gave some comment to supplement the richness of the data gained. This represents 36.56% of the whole respondent sample. The survey data will be presented thematically around specific units of analysis, which are relevant to the main research questions. Selected relevant texts of respondent opinions are quoted to give further evidence to the qualitative data obtained. For the purpose of this study, the comments have been translated into English. These comments have been carefully edited for clearness and conciseness.

This chapter is divided into five sections. Section 4.2 illustrates respondent demographics. Section 4.3 relates to findings on current awareness of tourism development in Brunei. Section 4.4 highlights community perceptions on tourism development and planning in Brunei from political and economic perspectives. Section 4.5 serves to detail community perceptions on tourism development and planning in Brunei from the socio-cultural aspect. Section 4.6 presents tourism community perceptions from a technological perspective. In each section, the researcher has included selected comments expressed by respondents in the open-ended section of the questionnaire. These comments give further evidence to the findings of the study. Respondent's assumptions and value systems were revealed in these statements.

The research findings have in some cases confirmed various conclusions advocated by academics as discussed in the literature review. However,

research of this particular nature has never been made at a local level in Brunei although Ahmad's work (1999) on the effect of ecotourism development in Brunei's national parks on the Iban and Dusun communities have paved the way for researching community perceptions of tourism. Similar investigations and studies within a South East Asian context are also scarce but does provide some illuminating trends which shed some possible similarities to Brunei. The analysis of the data is then concluded by highlighting key issues and findings related to community perceptions of tourism development in Brunei.

#### **4.2 Respondent Demographics**

Brunei's male to female ratio is 1:1 and this is reflected in the almost equal numbers of male and female respondents. The respondents comprised of 228 females (49%) and 225 males (48.4%). Many respondents were considered to be within the youth to early middle age range (25-34 years). The age category data is presented as follows: 35.9% within the 18-24 years range, 39.1% within the 25-34 years age range, 15.9% in the 35-44 years range, 6% in the 45-54 age range, 1.5% in the 55-64 years range and only 0.9% over 65 years age range. A high proportion of respondents were of Malay racial origin (89.5%) namely the Brunei Malay, Kedayan, Tutong, Belait, Bisaya, Murut and Dusun. The rest of the respondents included Indians (0.4%), Chinese (7.7%) and those from other races comprised 1.5% of respondents.

Most live in the Brunei-Muara district (85.2%) with other respondents living in the other three districts namely Temburong (3.4%), Belait (3%) and Tutong (7.3%). Many respondents (40.4%) had lived in their respective districts for all their lives. The length of time the other respondents lived in their current districts are as follows in ascending order: 1-5 years (5.6%), 6-10 years (4.1%), 11-15 years (6.2%), 16-20 years (8.4%), 21-25 years (14%), 25-30 years (11.8%) and over 30 years (8.4%).

As illustrated in Chapter 2, this corresponds to population density where the most populous district is Brunei-Muara. The tenure lived in their respective

districts is also indicative that Bruneians tend to stay within their districts and that there is little migration to other districts. A reason for this may be due to the traditional structure of the extended Brunei family. Multi-generational households are the norm and have a great pivotal role in cohesively molding the family together. Extended families tend to occupy houses in close proximity to each other for safety and convenience. The challenge of relocating such family structures to different districts would be highly challenging. It is believed that people who worked in other districts would still prefer to commute to their work places rather than move houses.

A high proportion of respondents had degree level education (42.8%). Similarly 42.6% of respondents had between Secondary 3 to Secondary 6 ('A' levels) education. Only 2.6% had education that was below Secondary 3 level. A further 8.6% of respondents had gained qualifications to postgraduate degree level. The number of highly educated Bruneian women is reflected in the high ratio of female university students to men. Therefore, it is possible to assume that the average female respondent was typically a well-educated Malay woman in her mid twenties to mid thirties who had lived in her current district for all her life.

#### **4.3 Current Awareness of Tourism Development in Brunei**

Public awareness of tourism development in Brunei indicates that more than half of the respondents (52.7%) first became aware of plans to develop this industry between the years 1997 to 1999. Only 18.1% of the respondents were aware of government plans to develop this industry between the years 1994 to 1996. This indicates that it was only in the late 1990s that the government began to make the public aware of future plans for tourism development in Brunei. This is indicative of the government's thinking that has shifted from being laissez faire towards tourism development to pro-tourism. This reflects the government's acceptance and rationalisation that tourism, as an industry is an effective contributory activity towards national income.

The government to publicise its initiatives and to gain public support of its activities has always favoured television as a tool for fast and effective communication to the local population. It was found that the most popular medium for disseminating information pertaining to tourism was through television at 43.4%. This is followed by newspaper coverage at 34.8%. Several respondents have stressed the importance of encouraging public awareness on tourism especially through the media. This highlights public awareness of the importance that the media has to play in effective tourism information dissemination. Public awareness is not limited to local knowledge but to other international audiences as well.

Tourism relies on the host country's product to sell an aspect of itself to the outside world. The tourism product is dependent on the country's resources and in Brunei's context the most viable and exploitable resource is its natural environment. Respondents are generally aware of the nature of tourism targeted for development by the Government. Brunei's beautiful jungle is the prefect resource to exploit the eco-tourist market segment as acknowledged by 70.3% of the respondents.

Awareness that cultural tourism and adventure tourism have been earmarked, as other potential segments is also high at 52.9% and 38.1% respectively. Respondents accept that Bruneian Malay culture may be packaged and sold as a tourism product because cultural-based tourism has always been a popular product for tourists. Adventure tourism is also a logical by-product of eco-tourism because of the Tasek Merimbun national heritage park has an excellent outward bound school that offers this form of tourism.

Cruise, royalty and sports tourism have also been cited in the tourism Masterplan as potential segments but as reflected by respondent answers, awareness of its development is limited. With regards to cruise and royalty tourism, the perceived problems include limited access to cruise liner facilities in Brunei, difficult access and visitation rights to royal palaces and other royal institutions.

Although numerous international sporting events have been successfully held in Brunei such as the annual World Badminton Championships, the Brunei sports tourism market segment faces intense competition from abroad. The sports facilities and venues are adequate but the respondents appear to believe that current sports infrastructure (facilities and venues) are still limited which makes it less attractive than other host destinations such as Malaysia and Singapore which have world class sports venues.

With regards to awareness of tourism policy and directives, a high percentage of respondents became aware of decisions or proposed development plans made by the relevant authorities on tourism development through information dissemination via television at 69.9%. Again, this illustrates the importance of this medium as a channel of communication to create public awareness and gain community consensus on government policy. Newsletters, newspapers and radio are also popular sources of information at 63.9% and 54.2% respectively. Only 19.6% of respondents have cited that such tourism proposals were made known to them via public meetings. Very few respondents cited tourism knowledge gleaned from sources not advertised locally or from other means.

Tourism is a multi-faceted industry with multiple players at levels, many of whom have different vested interests in developing this industry. As a multi-product industry, all the individual product and service providers who make up the cumulative tourism product to give the tourism experience can exert varying levels of influence which may shape the industry. It is safe to assume that, the greater the vested interest, the greater the level of involvement of the entity within this industry thus the greater the impact it will have in directing and shaping tourism development in the host country.

It has been found that most respondents were aware of the key groupings currently involved in tourism development and planning. Respondents ranked the Government of Brunei, the Brunei Association of Travel Agents (BATA), the Brunei Association of Hotels (BAH) and media as obvious key stakeholders in this industry at 80.6%, 75.7%, 56.1% and 55.9% respectively.

This is a valid and illuminating statistic as it reflects public opinion, which concedes that the Brunei Government holds the balance of power and has the most vested interests in developing this industry in Brunei. It has the most power to mould the direction of its growth in Brunei through the implementation of policy that affects tourism. Without official government endorsement, tourism would never have been widely accepted as a viable industry. This study shows conclusively that the public believes that this industry is government-led.

Its vested interest is the highest as it views tourism as an alternative to its oil and gas revenue. BATA and BAH are seen as obvious stakeholders in this industry because they are important suppliers of hospitality services in terms of travel and accommodation. However, these entities are relatively powerless, as they cannot influence tourism policy making much in Brunei due to their small membership. The media is seen as an important and visible key grouping, as they are obvious channels used to promote Brunei tourism. However, they are simply used as channels of information dissemination and have no power as agents of change on government policy.

Respondents viewed the following key stakeholder groupings to have less involvement in tourism development and planning in Brunei: local businesses (36.1%), tourists (31.2%), local communities (26.2%) financial institutions (24.3%), and ordinary citizens (16.6%). The private sector is perceived to have very little influence and involvement in tourism because of two main factors. The first being, local businesses in Brunei form a very weak collective with very little pulling power in government circles. The second probable factor is that the public views tourism as a simple product as opposed to a multi-level and multi-product industry thus tourism service providers are limited to the most obvious namely hotels and travel agents. Perhaps they do not understand clearly the link between taxis as transportation providers, restaurants as food and beverage caterers, traditional arts and crafts houses as souvenir producers and so forth. It is clear that the public does not define these local businesses as part of the tourist service provider chain.



The number of tourists that have been to Brunei has been small in the past. Due to their small number and comparatively small expected number in arrivals for VBY 2001, the public recognise that they will have very little say in this industry because as a fledgling industry, it is dominated by government directive and the overall offering is limited by current tourism facilities and attractions made available to tourists. The local communities in Brunei, financial institutions and ordinary citizens are regarded as fairly insignificant players as perhaps they are viewed as 'recipients' of tourism benefit only as opposed to powerful actors with real and valid vested interests. This may explain why the public has ranked them as low priority stakeholders.

The local community and ordinary citizen expect to gain from the multiplier effects of tourism (e.g. employment generator and better quality of living). With regards to the financial institutions such as banks, their involvement is ranked at 24.3%. It is likely that the public's impression of the extent of their stakeholder ownership is limited to providing loans to tourism businesses as well as foreign exchange transactions.

A very high percentage of respondents (83.9%) also believed that a wider group of stakeholders should be involved in tourism planning and development. The public may recognise that as tourism development was initiated to benefit the community, therefore community members should be able to exercise some power over its development. Many respondents (78.3%) have disclosed that they are not directly or indirectly involved in tourism development and planning in Brunei.

Out of these respondents, 57.4% have stated that they would like to be involved in tourism development and planning. This shows that Bruneians are willing to be involved in tourism and marks a shift in attitude from viewing the industry as being negative and bad for the country to one that is beneficial for Brunei. This encouraging statistic hints that perhaps there may be a sustainable future for tourism development in Brunei because people are interested to participate in this industry. A deeper insight into public perception of tourism in Brunei from political and economic dimensions that will be

discussed next will help to provide evidence or refute public support for this industry.

#### **4.4 Perceptions on Tourism Development and Planning in Brunei from Political and Economic Aspects**

Governments because of its many potential economic benefits usually initiate tourism development for the good of its nation. Due to its potential economic benefits to Brunei, one might presume that it will become an important economic activity. The study has found that 52.9% of respondents agreed strongly with the notion that accepts tourism as an important economic activity whereas 43.4% was in agreement (Table 1). As observed by a respondent:

Tourism is very important for a country to develop politically and also economically. But without proper control it can in its own way destroy our very unique lifestyle and culture and religion. There should be a balance between the readiness to change and conserve.

A potential benefit of tourism development is job creation for the eight thousand unemployed youths in Brunei (Borneo Bulletin, October 2002). The unemployment rate is set to increase by a thousand people every year thus tourism is seen as an area, which may absorb this excess capacity. This corresponds with several primary assumptions implicitly held by respondents who believed that 'the development of the tourism industry in Brunei would generate local employment amongst the local young population in Brunei', that 'tourism does contribute to economic development' and that is a 'good and necessary long-term soft option for economic diversification from the oil and gas industry'. As illustrated by almost all respondents, many believe that tourism development contributes towards job creation in Brunei (46.2% and 44.5% of respondents agreed and also agreed strongly with this statement respectively).

Similar frequencies were found with regards to the contributory power of tourism development towards the nation's GNP. Almost half of the respondents at 47.5% agreed with this statement whereas only 32.7% strongly agreed. It may be that the latter view tourism as a supplementary economic activity for Brunei and not as a truly viable channel in which to achieve complete diversification from oil and gas.

Some respondents however have voiced their concern that tourism may simply be a white elephant and that the true economic benefits may never materialise. A pessimistic comment was made by a respondent who stated that:

Brunei has hosted the South East Asian Games 1999 and APEC Summit 2000, yet there is no (published) statistics showing the economic impact on how we have gained (or not) from those events. As far as Visit Brunei Year 2001 is concerned, the relevant authorities should come up with projected (or estimated) total impact of tourism (including direct or indirect revenues) to the total economy of Brunei Darussalam and it must be announced publicly.

The above comment illustrated that some members of the public are sceptic about tourism development in Brunei. The above comment also highlights the fact that very little empirical and qualitative research has been conducted, which can truly justify the costs and overall benefits of tourism development in Brunei. The lack of research and follow-up monitoring and assessment is unfortunately a prevalent practice in national management.

**Table 1 Section B: Perceptions on tourism development and planning in Brunei from political and economic aspects**

<b>Questionnaire statement</b>	<b><u>Agree</u> <u>Strongly</u> <u>(%)</u></b>	<b><u>Agree (%)</u></b>	<b><u>No opinion</u> <u>(%)</u></b>	<b><u>Disagree</u> <u>(%)</u></b>	<b><u>Disagree</u> <u>strongly</u> <u>(%)</u></b>
1. I consider tourism as an important economic activity	52.9	43.4	1.9	0.9	0.9
2. Tourism development contributes towards:					
a) Job creation	44.5	46.2	4.5	1.1	0.2
b) Gross national product	32.7	47.5	14.4	1.3	0.2
c) Foreign exchange earnings	43.9	44.5	7.5	1.1	0.2
d) Foreign direct investment into Brunei	43.0	45.8	6.9	1.3	3.0
e) My personal income	7.3	20.2	46.2	15.9	4.3
3. I think tourism is a viable industry in Brunei.	17.6	55.9	17.6	5.2	1.1
4. Tourism will be a sustainable industry in Brunei.	17.4	50.3	24.3	5.8	0.6
5. I support the government's role and efforts in developing tourism.	47.3	44.3	6.9	0.2	0.4
6. I believe the government has the ability to conduct long-range planning to overcome environmental impacts associated with tourism development.	33.1	47.3	15.7	2.4	0.6
7. I think the government is sensitive to the needs of the community with regards to tourism development and planning.	13.1	42.4	31.4	9.9	1.7
8. Tourism development must be controlled and should be monitored.	47.5	44.3	3.4	4.3	0.4
9. All restrictions to tourism development must be removed to develop this industry.	32.9	31.4	19.1	13.8	2.4
10. I believe the actions of government and elected/appointed officials are consistent with resident desires.	11.6	34.6	41.3	9.2	2.2

\* n=465

**Table 1 Section B: Perceptions on tourism development and planning in Brunei from political and economic aspects (cont)**

<u>Questionnaire statement</u>	<u>Agree Strongly (%)</u>	<u>Agree (%)</u>	<u>No opinion (%)</u>	<u>Disagree (%)</u>	<u>Disagree strongly (%)</u>
11.I believe that the appropriate policies and development options for tourism in the context of indigenous peoples in Brunei have been correctly identified.	7.3	40.9	38.9	10.1	1.3
12.MIB in governance will have a strong effect on the manner in which tourism is developed and planned in this country.	25.2	42.6	24.5	5.6	1.5
13.I believe that the presence of multinational companies in Brunei should be encouraged, as it will help to promote the tourism industry.	36.6	47.3	11.8	3.2	0.6
14.I am concerned that the economic gains that Brunei should enjoy may go to others such as foreign service providers.	19.1	35.3	26.7	15.9	2.2
15.I am concerned that non-vendors in Brunei will benefit the most from tourist revenue.	18.3	33.3	26.9	19.1	1.7
16.Tourist attractions are adequate for current visitor arrivals in Brunei to generate sufficient profit.	6.0	19.4	13.8	41.7	18.1
17.Hospitality facilities are adequate for current visitor arrivals in Brunei to generate sufficient profit.	5.4	28.2	23.0	32.0	10.5

\* n=465

An economic measure of success in tourism development is the sum of foreign exchange revenue, which a country profits. In Brunei, this revenue is naturally much sought after. Overall, respondents acknowledged that foreign exchange earnings might be increased through tourism receipts with 44.5% in agreement and 43.9% of respondents in strong agreement with this notion.

With regards to the contributory power of tourism development towards increasing foreign direct investment into Brunei, 45.8% and 43.0% of respondents were in agreement and in strong agreement with this belief respectively. A low percentage of respondents indicated that they stood to gain from tourism development in Brunei at 20.2%. This is a reflection of the low number of participants who believe that they may profit in this industry in Brunei.

Tourism, like any other industry follows a cyclical pattern. As it matures, it shifts from strength to strength with the host destination producing more tourism products for its new visitors and repeat visitors. Despite being a fledgling industry at the beginning of its cyclical life-span with limited tourism product offering, more than half of respondents at 55.9% agreed that tourism is indeed a viable industry in Brunei. The facilities at present make tourism development a viable option in Brunei. Only 17.9% were in strong agreement as to its viability. An optimistic respondent stated that:

Tourism if developed well in the future is an industry that can enhance and bring economic benefits to our country apart from oil. I hope this industry will be successful in future.

However, a viable industry is not necessarily a sustainable one. What the host nation can do now may not be achievable in future. Effective tourism development and management leads to a sustainable industry for future generations. This will lead to sustained and on-going economic benefits for the population. Sustainability of Brunei's tourism industry is necessary to bring about the expected immediate benefits and multiplier effects of tourism and

50.3% of respondents were in agreement to this statement. Similarly, only 17.4% of respondents were in strong agreement.

Similar findings were found that indicate respondents' support of the government's role and efforts in developing tourism with 47.3% in strong agreement and 44.3% in agreement to the statement.

The study has so far demonstrated that there is a high level of uniformity in respondent opinion. This is a theme that will continue as further dimensions are investigated which probe deeper into local community perception towards tourism development and planning in Brunei. The high level of consensus found in respondent opinion may be attributed to the cultural tendencies and nature of Bruneians as a whole. Collectivism is the norm in Bruneian society. There is a tendency to encourage collectivistic behaviour because Bruneian society is still very much a traditional family oriented society which accepts executive power and direction. Here the executive power is the government and Bruneians have a deep respect for authority and thus for authoritative government policies. Policies and government actions are likely to be accepted because they are a government driven initiatives.

Despite public support for this industry, less than half of the respondents at 47.3% agreed that the government have the ability to conduct long-range planning to overcome the environmental impact associated with tourism development. On the other hand, 33.1% were in strong agreement with this statement. This may be because the public is aware of the problems of long-term planning in a fickle industry or perhaps they are aware that Brunei does not have the capability and manpower to minimise and control any negative environmental impacts. This responsibility falls under a small Forestry Unit in the Ministry of Industry and Primary Resources which is likely to be ill-equipped to deal with the enormity of the task related to environmental monitoring and assessment.

Only 42.2% of respondents believed that the government is sensitive to the needs of the community with regards to tourism development and planning.

This raises the question as to whether tourism will truly benefit the community as espoused by the government if the sensitivities of the community have not been met in the first place or indeed considered. Similarly, 47.5% of respondents strongly agreed that tourism development must be controlled and should be monitored in Brunei. Another 44.3% of respondents agreed with this notion.

Tourism development, management and planning policies are more often than not the province of the government officers who fail to disseminate these aims and goals to the general public and to other stakeholders. The champions of the causes are not necessarily the doers of the cause. Tourism relies on co-operative effort by all parties. The preparation for tourism requires effective time management. Despite being a 'soft' economic development option for Brunei, such measures that must be undertaken in tourism cannot be rushed through. Respondents pointed out the dangers of ineffective tourism management, which can lead to disastrous 'last minute preparations' that may compromise sustainability of this industry. One respondent wrote:

Brunei's tourism is just around the corner and as a representative of the public; I am not really aware of what the preparation and have been done for the occasion. Is it supposed to be a surprise to all until the actual occasion? So far I have hardly seen any preparation done with regards to Brunei tourism. Unlike other countries for example, Malaysia, long plans and schedule have been laid out years before Visit Malaysia Year was launched. These plans were made available to the general public and travel agents. This would enable them (public and tourists) to plan ahead for their vacation at their own convenience. Events not only catered for tourists from abroad but also the local Malaysians as well.

In contrary to what the Bruneian tourism committee's initiative, they overlooked this problem by mainly focusing on other tourists from abroad by leaving the Bruneians out of this scenario.



The above comment draws attention to the predominant belief that tourism development is seen as a typical government 'rush job'. It is visible to many respondents as indicated by the results found that tourism planning and development should have been initiated and publicised and thoroughly assessed in terms of feasibility within a longer time period to enable others (e.g. travel agents) to plan and market for increased tourists' arrivals. More importantly, the public should have been made aware of such plans at an earlier stage to avoid confusion, resentment and other ill-feeling as some locals do feel left out of this process especially when the tourism development is taking place within their own locality which may have a great impact on their daily lives.

Each host destination has its own laws governing the tourism industry. In Bruneian context, the limiting laws concern legislation on entertainment provision and alcohol consumption. Almost a third (32.9%) of respondents strongly believed that all restrictions to tourism development must be removed to develop this industry. On the other hand 13.4% of respondents rejected the idea of complete liberalisation and removal of tourism control mechanisms for this industry. The former mostly comprises of the younger generation, which may regard entertainment as a necessary leisure activity in their modern lifestyle. It is possible that those who reject complete liberalisation may have stronger religious tendencies than the former and are more concerned with limiting and minimising the negative effects of uncontrolled and liberal tourism development.

In the study, 41.3% of respondents indicated that they held no opinions pertaining to whether or not they believed the actions of government and elected/appointed officials are consistent with resident desires. However, 34.6% did show that they agreed that official policies and actions of such elected officials were in line with resident desires. The high level of indifference exhibited by the former is a cause for concern because it may be a reflection that they are not concerned at all about whether the government's

actions and policies may or may not be appropriate for residents within their community.

Respondents agreed that they believed that the appropriate policies and development options for tourism in the context of indigenous peoples in Brunei have been correctly identified at 40.9%. Only 10.3% were in disagreement with this belief. A respondent from Temburong expressed that:

I learnt about tourism development via the district Office in Temburong. Hopefully, tourism development in this country will be of importance to the community and to the nation and not for just a few people. Hopefully, the districts that have potential for ecotourism will not be exploited. Let the community in each district be given special consideration in designing and developing their own tourism development in their respective areas.

The above comment is one of many which advocate community-based tourism development that will benefit and empower the communities that have to play host to tourists. The sense of community ownership of tourism initiatives by the community members will create harmony within the population as they feel valued by the government. This in turn will enhance support for further government initiatives and policies on tourism in the community.

Respondents were also concerned about compromising the MIB philosophy in tourism. Many advocate promoting tourism whilst 'upholding this national philosophy', others called to 'strengthen and reinforce MIB principles to prevent unwanted influences' from tourism. Findings indicate that 42.6% agreed that MIB in governance would have a strong effect on the manner in which tourism is developed and planned in this country. Only 25.2% indicated that they were in strong agreement with this notion. This elicited many comments from respondents as shown below:

Together we shall make tourism successful to seek God's blessings.

This was a typical comment found in the research. Brunei Malay Muslims believe in pre-destination and that all events are pre-ordained. It is believed that tourism was already pre-destined to occur in Brunei and should be regarded by the collective as an activity that will lead to God's blessings on Brunei. A respondent suggests that although tourism development is important as a source of national pride, it is essential that:

This industry must be developed further particularly with regards to its management. This must be under the Islamic ethos so that the benefits for this country will be seen by the tourists hence in the process they will recognise that Brunei is a Malay Muslim Monarchy.

Here, the respondent touched on the importance of having a visible element of the culture showcased to the visitors. Tourism development cannot be undertaken under alternative guises but the MIB philosophy. Another respondent wrote:

The tourism programme should actually illustrate the way of life, Islamic identity such as religious buildings, mosques and the strength of religious belief amongst the people of Brunei. I am not sure how the effect of the tourism industry will have on the religious belief of the people in Brunei. In my observation, minimal effort has been done in order to preserve and beautify the beaches that left me with a question, is this a deliberate strategy to curb unhealthy and negative activities? The reason being is that if tourists are left to expose themselves on clean beaches, I fear that it would lead them to believe that these unislamic activities are acceptable in the community.

This comment was interesting because it outlined what some Bruneian Muslims believe to be acceptable forms of tourism for Brunei. Brunei's tourism products should have an Islamic theme to preserve the lifestyle. It also shows that at community level people are aware that tourism may change the

religiosity, principles, morals and ethics of its people. The participant also illustrated a relevant concern that immoral activities such as sunbathing on Brunei's beaches by foreign tourists would lead to flagrant violation of Brunei's sensitivities and culture. An environmental concern was also raised that with regards to ill-maintained and ugly beaches. This is not a deliberate strategy to prevent tourists from utilising the beach but is indicative of weak environmental practices in Brunei.

The above comments and findings exemplify the community's typical adherence to the national philosophy and that 'Brunei should uphold the MIB concept in all aspects'. It also reveals Brunei's strong ideological belief systems that are seen as being appropriate and applicable at all levels of national governance. The first comment itself is a strong indication of Bruneian Muslims' religiosity which treats all actions as activities which should be carried out for other spiritual and Godly reasons rather than being limited by motivations that are economic-driven. The results also found that very few respondents viewed MIB unfavourably and wanted this philosophy to be modified, adapted or changed to suit tourism needs.

Tourism is an international industry, which has many service providers such as hotel chains, car hire companies, international eateries and restaurants and so forth operating overseas franchises and linkages to cater for its international consumers. In Brunei, the presence of international franchisees is limited. This is a factor, which must be addressed in promoting tourism in Brunei. Respondents agreed at 35.3% that the presence of multinational companies in Brunei should be encouraged, as important and necessary agents to help market this industry.

As a country which is mostly dependent on imports for its local consumption, there is a very high probability of the occurrence of financial leakage in this industry that will drain the revenue from this country into other countries which have provided the imported goods in the first place. More than a third (35.3%)

of respondents agreed and indicated their concern that the economic gains that Brunei should enjoy may go to others such as foreign service providers. Similarly 33.5% of respondents agreed that the possibility of non-vendors in Brunei benefiting the most from tourist revenue is of concern to them. It may be deduced that the community is aware that the real tourism benefits will be leaked away if there are too many non-local vendors operating in this industry. The overall effect of tourism development would therefore be minimal for the local community as a whole.

Brunei's market competitiveness as a desirable tourist destination is implicitly questioned. Critical threats to successful industry development were discussed by many respondents with regards to the lack of proper tourism infrastructure and transportation system in Brunei. Taxis and bus links are often mentioned and criticised for being too expensive, unregulated, unsystematic and inefficient. Furthermore hotel classifications are almost non-existent and do not conform to international standards of classification. Respondents have expressed their concern that hotel occupancy rates will not be sustained post-VBY 2001.

A survey participant raised the issue of price competitiveness of the tourism products in Brunei. She commented that:

The souvenirs are just too expensive. How can we expect the tourists to buy our products? How can we increase our chances of foreign direct investment when we are so economically over-priced? Hotels here are too pricey. You pay BND\$100 for a 'no star' hotel when you only have to pay RM200 (equivalent to BND\$91) for a room in a five star hotel. Shopping there is paradise too! I think the tourism committee should have looked into this but I think it is already too late as VBY is just around the corner.

This comment illustrates the perceived price un-competitiveness of the Bruneian tourism product for items such as souvenirs and accommodation.

Again it highlights public perception that the relevant authorities have not considered these factors in depth.

Almost half of respondents at 41.7% have acknowledged that the number of tourist attractions is inadequate for current visitor arrivals in Brunei to generate sufficient profit. Related to this at 32.0% is of the opinion that hospitality facilities are also inadequate for current visitor arrivals in Brunei to achieve sufficient profit generation. Many respondents have cited the fact that the tourism facilities here are limited, unsophisticated and lack proper maintenance. As two respondents commented:

Brunei truly has to make adequate preparation to make 2001 a good Visit Brunei Year hence support from all levels of the society is very much needed. Apart from providing tourist attractions, its cleanliness is also an important key aspect of tourism. The responsible authorities have to establish a body specifically to monitor the surroundings from time to time to ensure that cleanliness become a full-fledged community duty in Brunei. Secondly, the authorities have to take decisive action towards acts of vandalism. The time and cost of having provided the beautiful places of attraction will be wasted if we do not learn to value them.

Tourism development in Brunei is very limited because of the lack of tourist attractions. There are many islands that may be developed as resorts but are not managed. There is a lack of will and motivation to promote this industry by those entrusted with this job. They are still very passive and they just do not care. Perhaps this industry is not so important at this present time because the locals still have many other opportunities to get alternative livelihood elsewhere.

This exhibits community knowledge of the problems which the government is encountering to provide good quality tourists attractions and facilities because it does not have the necessary capability nor the knowledge and strength to implement pro-tourism policies. Gaining community support, upgrading and maintaining the cleanliness of public areas, the lack of political will and power in this industry are sources of concern for the community. The above comment also draws attention to the indifference to some community members who lack the pro-activity to empower themselves to create other sources of economic livelihood from tourism.

The research findings illustrate the high consensus level across all respondent demographic classification perceptions on tourism development and planning in Brunei from political and economic aspects. As mentioned earlier, this is due to the socio-cultural profile of the Bruneian population which emphasises community spirit, cohesion and support in thought and action. This trend is also likely to be shown in the research findings from a socio-cultural perspective that will be discussed in the next section.

#### **4.5 Perceptions on Tourism Development and Planning in Brunei from the Socio-Cultural Aspect**

In the months prior to the official launch of VBY 2001, the media has made reports of mass community wide support for tourism (Borneo Bulletin, 2000). The study does provide conclusive evidence to these reports as illustrated by the high level of respondents (54.0%) that have indicated that they do support tourism development in their community (Table 2). Only 37.0% strongly agreed that they supported this industry. It is very likely that the support given to the industry is directly related to the nature of the vested interest that they have through participation in this industry. More than half of respondents at 60.4% believe that community at large does support tourism development whereas only 21.1% have indicated that they were in strong agreement with this notion.

Community based tourism advocates for consultation and mutual agreement between tourism planners and the community. This implies that the community has a right to consultation. Surprisingly, 33.8% of respondents held no opinions concerning their right to be consulted in the processes of tourism development. This high level of apathy would not be found in the developed western context where many are usually interested and are able to actively voice out their opinions to the relevant parties. However, 41.5% and 16.6% agree and strongly agree respectively with the notion that they have a right to be consulted in tourism development in Brunei. Therefore some community members are aware of their rights to developing this industry within their community. Whether or not they actively choose to exercise their rights and to have their opinions considered is a different matter entirely.

Tourism development has occurred mainly in the city centre area or in Temburong, the centre for eco-tourism. Both Belait and Tutong, have seen minimal tourism development, which has brought about vociferous criticism that the benefits of touristic revenue will be never be shared by the communities in these areas. A small percentage of respondents at 16.8% have indicated and agreed that they were not happy with the way their community was planning for tourism. Only 35.1% agreed that they were indeed happy with the direction taken for tourism planning in their community. The statement below is indicative of the dissatisfaction held by many community members towards community tourism development in Brunei.

The BTDU is concentrating only on ecotourism and on visiting places of interest in Brunei; but there is actually no place or institution in Brunei that have cultural shows opened on a daily basis or weekly basis where tourists may learn and study our culture. Entertainment is also one reason why people go to other countries. There are not many places that provide these things that tourists want when they come to Brunei. If we see tourism development in Belait, it is very depressing. They are not being exposed as tourist destinations; there are no banners here. There should be banners here so that people



can really know about tourism. Usually, tourism is just a term here amongst the community, they know about tourism but are uninterested and not motivated to participate in this industry. It seems tourism is on being concentrated in Bandar only. Why is this so? Belait is where the wealth of Brunei is derived from. We are also closest to the neighbouring Malaysian border, namely Miri. If advertisements are properly distribute and handled in Belait, it is possible to attract more Miri people to Brunei. Why treat us like a backwater town?

The above comment highlights the following: the lack of tourism entertainment venues and facilities, lack of marketing Brunei as a tourist destination and the problem of rekindling interest in this industry. There is valid concern brought about by the apparent preference to develop tourism in the city centre instead of uniformly developing tourism in all four districts so that the benefits are felt equally.

The lack of tourism education in Brunei is widely acknowledged. Respondents also referred to the government's shortcomings in proving and disseminating clear information of the benefits of tourism to the community. Many respondents disagree that the people of Brunei have received adequate education with regards to the benefits of tourism at 35.9%. On the other hand, 29.2% agree with 11.0% in strong agreement.

Some respondents advocated a more cohesive and integrated approach to tourism vocational and technical education, apprenticeship programmes. A need to build effective linkages between the private sector, government and tourism education providers was succinctly pointed out as illustrated by the comments made by respondents:

Everybody needs to sit down and plan for tourism, the educational institutions, travel agents and related departments. The government must keep the people informed (those who are involved).

**Table 2 Section C: Perceptions on tourism development and planning in Brunei from the socio-cultural aspect.**

<u>Questionnaire statement</u>	<u>Agree Strongly%</u>	<u>Agree %</u>	<u>No opinion%</u>	<u>Disagre e%</u>	<u>Disagree strongly%</u>
1. I support tourism development in my community.	37.0	54.0	6.7	0.9	0.4
2. I believe the community supports tourism development.	21.1	60.4	14.4	3.0	1.1
3. I feel that I have a right to be consulted in tourism development in Brunei.	16.6	41.5	33.8	5.6	0.9
4. I am happy with the way my community is planning for tourism.	8.4	35.1	37.4	16.8	1.5
5. The people of Brunei have received adequate education with regards to:					
a) the benefits of tourism.	11.0	29.2	18.5	35.9	3.7
b) the negative aspects of tourism development.	6.2	25.6	27.1	32.9	5.2
6. I believe that tourism development increases the quality of life in an area.	17.2	53.3	18.9	6.9	1.3
7. Tourism will perpetuate the master/servant relationship between tourists and the host nation (Brunei).	10.3	31.4	34.0	13.5	9.5
8. The indigenous group itself should control tourism in Brunei with an indigenous theme.	22.2	47.5	23.4	4.7	1.5
9. Tourism bodies should exert a high degree of control over culture to prevent loss of cultural identification amongst Brunei's youth	43.4	41.9	8.2	4.7	0.4
10. I am willing to invest my talent or time to make Brunei a great tourist destination.	17.2	46.9	29.0	4.7	0.9

\*n=465

**Section C: Perceptions on tourism development and planning in Brunei from the socio-cultural aspect (cont). \*n=465**

<u>Questionnaire statement</u>	<u>Agree Strongly%</u>	<u>Agree %</u>	<u>No opinion%</u>	<u>Disagre e%</u>	<u>Disagree strongly%</u>
11. Tourism will enable cross-cultural exchange to be conducted between indigenous and non-indigenous people in Brunei.	19.1	58.5	17.8	3.0	0.4
11. Better distribution of the benefits of tourism will be achieved through community involvement in tourism development.	20.2	61.1	14.6	2.6	0.2
13. Representations of Brunei's traditional lifestyle will become staged and inauthentic in this industry.	7.3	27.3	33.1	26.0	4.9
14. The high number of foreign workers working in this industry will limit tourist contact with locals.	17.0	26.9	27.3	26.0	1.9
15. Tourism development will increase negative socio-cultural aspects such as:					
a) Crime rates	5.6	30.1	22.6	34.2	5.2
b) Drug abuse	5.2	27.7	24.5	33.3	5.6
c) Alcohol consumption	9.7	34.6	19.6	28.6	4.9
d) Prostitution	8.6	27.3	25.2	28.4	7.1
e) Environmental degradation especially when they outnumber residents	9.9	31.6	26.0	24.5	4.3
16. Brunei's cultural heritage will become diluted because of increased foreign influence and presence in Brunei.	6.0	21.7	21.7	40.6	8.8
17. Tourism will lead to cultural rejuvenation and interest in traditional Brunei-Malay lifestyle, culture and arts.	19.1	62.4	11.6	4.7	1.3
18. I believe that tourist movement should be limited to certain areas only to preserve our natural environment.	16.6	42.4	15.1	20.2	4.9
19. The adoption of new cultural patterns will lead to loss of traditional Malay culture and dignity.	8.2	27.3	21.1	33.5	8.0
20. The national philosophy of MIB will not be affected by tourism development.	17.8	43.9	22.4	12.0	3.0

They should talk to us, the vocational and technical schools. Planning and doing are two very different things and the implementation stage is very difficult. I believe that they need us because we provide the training in hospitality and tourism. Education is needed to increase tourism awareness. So it is good that ongoing media news due to the APEC Summit Meeting is creating awareness.

Local Bruneians must be educated about the importance and benefits of tourism. There must be positive dedication and an able body of agencies responsible for tourism to help locals become more interested and involved in tourism thereby helping us to become more proactive in this industry. Although we may attend seminars and take part in promotional activities outside the country, nothing means anything nor has any effect if all the aspects (such as education and increasing the belief of the younger generation to participate in this industry) are minimised or ignored. People need to be more optimistic about the great potential that this industry has, so that it can become an important source of revenue for this country.

There is benefit if tourism education or knowledge is disseminated via the media. It will be even better and more effective if dissemination of knowledge to locals who live in rural areas is organised via seminars, talks, public announcements, and workshops by the relevant authorities in Brunei. The government should also elect an institution that will direct and implement development solely for tourism.

In summary, there are calls to propose more in-depth discussion and consultation between all the relevant parties involved. This will assist in the process of educating the general population about tourism in Brunei. Unfortunately in Brunei, the channels of communication are not very conducive to creating an environment whereby mutual agreement and

consultation may reach consensus in decision-making. This has led to a situation whereby the less powerful actors such as hospitality training institutions cannot contribute their knowledge in developing tourism within the Bruneian context.

Almost a third of respondents at 32.9% disagreed with the idea that local Bruneians have received enough information on the negative aspects of tourism development. Only 25.6% of respondents indicated that they agreed with this belief. This shows a real concern amongst the population that they do realise that tourism also has its own specific disbenefits, which the government has not made aware to the public.

Just over half of respondents at 53.3% believed that tourism development increases the quality of life in an area whereas only 17.2% were in strong support of this notion. However, as experienced in many countries that have already established tourism, an increase in the quality of life will also correspond to an increase in the cost of daily consumables. This is yet to happen in Brunei and will undoubtedly lead to the question as to whether the increase in cost of consumables versus the increased quality of life is truly justified.

Tourism was previously seen as a post-colonialist activity and this is reflected in the respondent rate of 31.4% who agree that tourism will perpetuate the master/servant relationship between tourists and the host nation (Brunei). With regards to indigenous group activity in tourism development and planning, almost half of the respondents at 47.5% agreed that the indigenous groups in Brunei themselves should control tourism in Brunei with an indigenous theme. However, this may be difficult to achieve in reality because of the inexperience and lack of tourism know-how of these groupings.

Bruneian culture is diverse and rich which is a source of pride to its population. It is an element that they are fearful of losing or changing which leads to cultural dilution. This is proven in the research finding as nearly half of respondents (43.4%) agree strongly with the notion that tourism bodies

should exert a high degree of control over culture to prevent loss of cultural identification amongst Brunei's youth. A similar finding was indicated for those who agreed with this notion at 41.9%. This would entail the government initiating cultural awareness programmes to students and the youth to instil a sense of national pride in promoting their cultural identities.

Tourism should benefit all and it is encouraging to find that 46.9% of respondents have indicated that they are willing to invest their talent or time to make Brunei a great tourist destination. This means that the multiplier effects of tourism will filter through to a wider audience. Agreement is high at 58.5% as the respondents hope that tourism will enable cross-cultural exchange to be conducted between indigenous and non-indigenous people in Brunei. They also agree at 61.1% that better distribution of the benefits of tourism will be achieved through community involvement in tourism development. Respondents (33.1%) also show a lack of opinion towards the possibility that representations of Brunei's traditional lifestyle will become staged and unauthentic in this industry.

The high number of foreign workers working in this industry, which may limit tourist contact with locals, appears to have elicited almost equal numbers of respondents agreeing and disagreeing with this notion at 26.9% and 26.0% respectively. A respondent suggested that:

From now on we have to limit the number of foreign workers in Brunei. This is because tourists will not be able to keep in touch with the locals directly. They would not know who the real Bruneians are.

Respondents agree that tourism development will increase negative socio-cultural aspects such as crime rates (30.1%), alcohol consumption (34.6%), and increases environmental degradation especially when tourists' arrivals outnumber residents (31.6%). They however disagree with the notion that increased drug abuse (33.3%) and prostitution (28.4%) rates are affected by tourism development.

With regards to social-cultural dimensions of tourism, many respondents agree that certain measures must be established to prevent negative impacts from occurring. A respondent wrote:

Obviously tourism will lead to inauthenticity of culture and traditions. However, at the same time we also have to help conserve our culture. On the other hand, if we have a choice to present our culture to tourists without having to sell our courtesy and culture for money, then certainly we should take such a method at hand. Nonetheless, the trend of the tourists industry world-wide is 'on selling their culture' so why then should we not follow them?

This comment is contrary to the prevalent belief that indicates that respondents (40.6%) disagree with the notion that Brunei's cultural heritage will become diluted because of increased foreign influence and presence in Brunei. They believe that tourists will not have a great negative impact on the socio-cultural environment in Brunei because they are 'short-term' visitors who come to Brunei as a 'pit-stop' destination only. Linked to this is the notion that tourism will lead to cultural rejuvenation and interest in traditional Brunei-Malay lifestyle, culture and arts of which 62.4% are in agreement. Some are however concerned that the visible artefacts of culture such as arts and handicrafts may be diluted to suit tourist consumption. It was suggested that secondary school leavers received training in arts and craft courses to keep the traditional industries alive and to become an important source of local suppliers for tourism souvenirs.

Only 42.4% of respondents do agree that tourist movement should be limited to certain areas only to preserve our natural environment. Many also argue that other forms of tourism should be developed instead of just eco-tourism so as to widen the range of tourism products offered in Brunei. Brunei's policy on banning alcohol is also seen as a threat to market competitiveness. A respondent suggested that:

Brunei should establish a tourist zone where certain facilities can be made available which will be solely for tourists that will not be in conflict with local restrictions such as serving liquors/beers. I am sure that this will create a win/win situation for everybody.

Only 33.5% of respondents have indicated disagreement with the idea that the adoption of new cultural patterns will lead to loss of traditional Malay culture and dignity. Lastly, 43.9% of respondents agree that the national philosophy of MIB will not be affected by tourism development.

As illustrated in the previous sections, there is a high level of uniform consensus in the community perceptions towards tourism development from a socio-cultural perspective. This is related to Bruneian cultural and collective tendencies, which means that they share similar opinions that do not vary greatly from each other. This is expected to appear in the analysis and discussion of community perception towards tourism development and planning from a technological dimension.



#### **4.6 Perceptions on Tourism Development and Planning in Brunei from the Technological Perspective**

The technological dimension of tourism development and planning in Brunei have also yielded interesting findings as illustrated in Table 3. Most respondents (91.4%) confirmed their belief that local Bruneians should be more actively involved in tourism business activities. Those who agreed (46.7%) ranked more than those who agreed strongly with this statement (44.7%). Some respondents have suggested that 'employment should be given to the locals only' so that the objective of generating jobs for Brunei's youth is realised.

It is interesting to observe that almost half of the respondents (46.5%) disagreed that the number of trained locals in this industry is adequate. The respondents also indicated that 28.2% of them held no opinion concerning this issue. A low percentage of respondents (9.9%) agreed that tourism training in Brunei for locals was adequate.

A large number of respondents (46.7%) also disagreed that the number of service-training institutions in Brunei is adequate. It is interesting to observe that 27.3% of respondents held no opinion on this matter. A further 10.5% of respondents disagreed strongly with this statement. Respondents also agreed that there is lack of tourism planning expertise in Brunei (45.6%) whereas an additional 18.1% agreed strongly with this statement. Only 28.4% of respondents held no opinions on this issue.

**Table 3 Section D: Perceptions on tourism development and planning in Brunei from the technological perspective**

<b>Questionnaire Statement</b>	<b><u>Agree Strongly</u> (%)</b>	<b><u>Agree(%)</u></b>	<b><u>No opinion</u> (%)</b>	<b><u>Disagree</u> (%)</b>	<b><u>Disagree strongly (%)</u></b>
1. Local Bruneians should be more actively involved in tourism business activities.	44.7	46.7	7.3	0.6	0.0
2. The number of trained locals in this industry is adequate.	4.7	9.9	28.2	46.5	9.5
3. The number of service-training institutions in Brunei is adequate.	4.9	9.2	27.3	46.7	10.5
4. There is lack of tourism planning expertise in Brunei.	18.1	45.6	28.4	5.2	1.7
5. There is a lack of tourism co-ordination and communication between the private sector and local authorities in Brunei.	19.6	47.7	23.7	7.3	0.6
6. There are insufficient human resources to fully develop the industry in Brunei.	17.8	52.3	16.1	11.0	1.7
7. Technical expertise should be made available to help local Bruneians to develop skills to become involved in tourism management and development of tourism.	41.1	49.2	6.7	2.4	0.0
8. There must be greater provision for tourism education courses for locals by both private and public sectors.	43.4	49.9	4.9	0.9	6.2
9. Men are more suited to work in this industry than women are.	5.4	8.2	21.3	43.0	21.5

(\*n=465)

Communication, collaborative and co-operation amongst the players in this industry is limited, inefficient and ineffective. There is a lack of tourism co-ordination and communication between the private sector and local authorities in Brunei as observed by 47.7% of respondents. A further 19.6% of respondents agreed strongly with this statement although some respondents (23.7%) did not have an opinion at all on this issue. Some respondents note that the decision-making is primarily conducted by the government, which illustrates that tourism is a government-led industry and may fail because of bureaucracy and red tape that is characteristic of government bureaucratic systems of governance in many countries. Respondents called for explicit calls for better communication amongst tourism stakeholders.

There must be frequent dialogue between government and non-government sectors to shape the orientation/blueprint of tourism development in Brunei; it must not simply be seen as a commercial commodity that may bring economic advantages but rather it should be seen as something that is suitable and does not contravene with the nation's aspirations and philosophy.

More than half of the respondents (52.3%) agreed that there are insufficient human resources to develop the industry in Brunei fully. This is supported by 17.8% of respondents who strongly agreed with this statement. However, 11% of respondents indicated that they disagreed with the statement whereas 16.1% held no opinion on the matter.

Almost half of the respondents at 49.2% agreed that technical expertise should be made available to help local Bruneians to develop skills to become involved in tourism management and development of tourism. Another 41.1% strongly agreed that this technical assistance and expert know-how should be made available to Bruneians.

Many agreed (49.95%) that there must be greater provision for tourism education courses for locals by both private and public sectors. Their view is

supported by 43.4% of respondents indicating that they agreed strongly with this statement. A respondent commented that:

I am grateful for this questionnaire. At least now I know something about tourism development.

The research has not only served to gain an insight into community perceptions but has also succeeded in educating some members of the community. There are other courses which have been directed to create greater tourism awareness and training which have been periodically offered to members of the public. However, the marketing of such programmes and courses may not be effective thus restricting the dissemination to a wider audience. Others have suggested that as effort should be directed to inculcate tourism education from secondary school and that special emphasis should be given to train school leavers who lack high academic qualifications to fill in the local labour market in the tourism and hospitality industry in Brunei:

Locals should receive adequate education about the benefits and negative aspects of tourism. Tourism providers should comprise of local Bruneians and they should give courses and training courses in tourism and related subjects. Hopefully in both long and short term, we can ensure that the benefits of tourism on the economy are really felt by the local populace themselves.

With regards to the notion that men are more suited to work in this industry than women are, 43% of respondents indicated that they did not believe this to be the case and thus disagreed with this notion. A further 21.5% showed that they disagreed strongly with this statement. A similar number of respondents (21.3%) held no opinion on this matter.

The data were thematically coded and illustrated to a variety of issues of concern amongst the community. These issues were grouped into political, economic, socio-cultural and technological categories and are summarised in the Table 4.

**Table 4 Respondent Assumptions on the Tourism Industry in Brunei**

<b>Dimensions</b>	<b>Assumptions on Tourism</b>
<b>Political</b>	Tourism development as a source of national pride Stable political environment is safe and attractive for family holidays
<b>Economic</b>	Promotes national and economic growth Creates employment and reduces unemployment Great need to reduce foreign labour participation in this industry Stimulates the under-developed and uncompetitive private sector Economically benefits a select few only Economic gains are small due to seasonal nature of tourism Widens scope of employment
<b>Socio- Cultural</b>	Cultural commoditisation is acceptable May affect and compromise MIB principles in practice May contribute to the quality of life in Brunei May increase undesirable and immoral behaviour through exposure by foreigners
<b>Technology</b>	Inadequate tourism education and vocational training Lack of trained workers Requires local with tourism expertise and knowledge
<b>Environmental</b>	Minimum environmental side-effects Inadequate environmental assessment and monitoring
<b>Tourism Management</b>	Inconsistent implementation of tourism management policies Inefficient channels of communication between stakeholders Community at large is not actively involved at decision-making level

The researcher's presentation of hard data in this study is useful and necessary because it provides strong evidence to support or refute the data found in the qualitative fieldwork which will be discussed in the following chapters. The respondent rate was satisfactory as 465 useful questionnaires were obtained. This large respondent number provides a reliable database, as the objective of this research was to gather community perceptions towards tourism development and planning in Brunei.

#### **4.7 Summary**

Overall, the survey results are satisfactory because of the high respondent rate of return achieved (465 useable questionnaires out of 500). The results were meaningful and insightful as they reveal current trends in tourism management in Brunei. Data elicited from the analysis of respondent comments in the open-ended section proved to be illuminating and satisfactorily supported the data presented above albeit in an ad hoc manner. Current community tourist perception is revealingly exposed. The author found that the answers justify her assumption that tourism development and planning is a vague concept to many members of the general public. It was clear that the respondents had a basic knowledge of the critical issues affecting tourism development and planning in Brunei. At best, most have a piecemeal knowledge of this industry in Brunei.

The analysis proved that respondent knowledge of tourism dimensions and aspects vary amongst respondents. In general, their knowledge appeared fragmented perhaps due to typical factors such as personal levels of education, attitudinal outlook, motivation, background and so forth. The attitudes and values of the respondents are explicitly revealed which show that the community do have definite opinions of tourism practices in Brunei. The study has revealed a high level of consensus amongst the respondent population. A cross-tabulation was carried out which revealed that this high level of consensus was consistent across all ages, race, ethnicity, gender and education.

To the western perspective, this is highly unusual because in the western world, there would be less consensus due to the wider scope of differing opinions

across these socio-demographical dimensions. The researcher concludes that the level of consensus is due to the Southeast Asian values that emphasise respect and acceptance of executive power, in this case the government. In addition, this may be due to the effect of institutionalisation in Brunei whereby the population has doggedly followed government directives unquestioningly.

Most show concern for the critical issues in tourism, which Brunei may face, which indicates a somewhat pessimistic view of its long-term success. The findings are consistent with the research findings of studies of resident perception to tourism development in other host destination countries. Indeed, the findings obtained from both the interviews and questionnaires are supportive and complementary to each other.

The author found that there is a glaring absence of knowledge and concern for effective tourism stakeholder management in Brunei. Greater community knowledge of tourism policies is more likely to empower the community to have a firm voice in this industry and thus lead to a multiplier effect, which will eventually benefit the community at all levels including grass roots level. The author concludes that the understanding of the respondents is delineated to perceiving this industry as being confined to a government-private sector affair. Tourism policies are not communicated to the general public and this problem is compounded by the fact that it is still very fragmented and thus lacks coherency and comprehension. The author argues that critical issues affecting tourism development in Brunei will not be addressed, evaluated and rectified thereby creating an uncomfortable inertia that perpetuates the shortcomings of tourism.

The main concerns exhibited appear to focus mainly on operational issues pertaining to the content of tourism namely the more visible touristic products on offer in Brunei such as the lack of tourist attractions and its dismal maintenance due to lack of financial resources. Perhaps one of the most important issues is that of inconsistent implementation of economic development plans. Respondents believed that there is low commitment to promote growth in this industry thus causing this inconsistency. Respondents

therefore called for commitment and pro-activity of the relevant tourism authorities and stakeholders.

The survey has demonstrated that there is great need for the community to receive adequate education pertaining to tourism whilst illustrating that it can have a positive contribution in terms of the country's socio-economic development. The research findings will either be supported or refuted by the findings found in the in-depth interviews. This will be discussed in the next chapter.



## **CHAPTER 5**

### **DATA PRESENTATION AND KEY FINDINGS:**

### **TOURISM MANAGEMENT IN BRUNEI AND ITS ISSUES**

#### **5.1 Introduction**

The research findings of the questionnaires have been illuminating concerning the development, management and planning of tourism in Brunei. As aforementioned, the researcher believed that tourism in Brunei has the following characteristics: small size, government-led, heavily fragmented and segregated with weak business linkages and limited community-based tourism development processes. It is hoped that the data found in this qualitative section will help expose the nitty-gritty of this industry from a specific stakeholder perspective.

This section aims to describe and analyze the true nature of tourism management and development planning in Brunei. The first five research objectives specifically mentioned in Chapter Two will be addressed, namely: to analyze the tourism industry and prevalent tourism management practices in Brunei; to examine the extent of community participation in the tourism process; to establish the views of various stakeholder groups as identified by the tourism policy makers on tourism community participation and tourism management leading up to Visit Brunei Year 2001; to determine the difficulties in implementing effective tourism management in a small Islamic country; to clarify the expectations of the various interest groups and reconcile their needs into a coherent, comprehensive and competitive tourism strategy for Brunei.

This study also aimed to provide critical answers to questions pertaining to tourism management in Brunei as outlined in Chapter 1. The author attempts to answer these questions using data elicited from documentary analysis (newspaper, electronic forums, internet articles etc.), in-depth interviews and non-participative observation in various meetings held on tourism development and management in Brunei. This chapter concludes by highlighting the key findings related to the research question.

## 5.2 The Nature of Interviewee Profiles

As discussed in the previous chapter, an analysis of respondent demographic profile shed light onto the nature of their gender, age, ethnic grouping, education levels, district lived in (either Brunei-Muara, Temburong, Tutong or Belait) and the tenure of living in that district. This exercise is also relevant to this particular aspect of the research. However, due to strict reassurances concerning the anonymity of the interviewees, the demographic profiling of these participants is limited to: gender, age range, private or public sector employment, tenure of government employment if applicable, education level, ethnic grouping, and religion. The other reason for this anonymity is that there may be possible repercussions of interviewee's candid perspectives on tourism reflecting back on that individual.

There were in total 25 interviewees who generously participated in this study. As discussed in the research methodology section, this number is not a random number but was dependent on the number of people willing to participate within a certain time frame. Solicitation of the interviewees was based on the 'snowball' technique of a known stakeholder who then recommended another ten people perceived to have stakeholder interest in tourism. The ratio of female to male participants is 1:4. This is unlike the 1:1 ratio found in the research questionnaire participants. This means that this qualitative research is affected by gender and that perspectives are heavily male dominated. There are bound to be differences in their values, attitudes, degrees of importance and significance attached to personal opinions. It is possible to deduce that tourism in Brunei is a male-dominated judging by the number of perceived male stakeholders in the industry. The significance of this will be discussed later.

With regards to the age range of participants, this range from 28 to 65 years of age. Only nine participants came from the private sector whereas the rest worked or had worked in the public sector. The interviewees came from the following sectors: government, media, education, business (hotel and travel agencies) and finally members of the community. It is interesting to note that

four of these nine were businesswomen. This is of interest because in Brunei, it is generally held that women are more active in business than men. Perhaps this is also applicable in the tourism industry but it is not within the scope of this thesis to provide conclusive evidence to this assumption. Men however, are more predisposed to work in the civil sector. Those working in the government sector have been working for the government from the start of their careers. These career bureaucrats have been employed as civil servants ranging from three to forty years. In one case, it was until the retirement age of 55 years old.

The researcher found that thirteen interviewees had received overseas education from diploma level to postgraduate degree level (including doctoral level). This means that many of the respondents are highly educated and are already exposed to western ideas. The others received local education from Primary Three and upwards.

With regards to the ethnic grouping, only one participant was Chinese and the others were predominantly Malay. There were three participants from the Murut, Kedayan and Dusun indigenous Malay tribes. One participant was from an Iban tribe. Only three interviewees were non-Muslims so these data are mainly from a Malay Muslim perspective.

As aforementioned, the researcher did not actively set out to get this sample. However, the sample used is significant because it represents a web of stakeholders who are perceived to have interests in this industry. All participants felt that they have strong interests in this industry and have in one way or another contributed or are contributing to this industry in VBY 2001. The researcher found that amongst these participants, there is genuine awareness of tourism and its implications because they understand or have jobs related to it.

This sample's classifications present an adequate range showing the spectrum of degrees of concern within the community for tourism development, planning and management in Brunei. The interviews were

conducted in both Malay and English reflecting the bilingual nature of most of the respondents. Some interviewees were more coherent and intellectual than others but all had very clear central concerns.

### **5.3 Presentation of Data Findings**

The in-depth interview questions are all inter-related so there are blurring boundaries between one issue and another. The researcher has attempted to present her findings thematically according to the questions posed but to some extent, there has to be some necessary overlapping in the questions which leads on to inter-related and interconnected data findings. The research findings have been thematically categorised where applicable into seven sections. These relate to: planning, policy and development issues of tourism in Brunei, the economic role of tourism, community attitudes and community involvement, socio-cultural and political processes and issues in Brunei affecting this industry, tourism-related education, tourism-related employment and issues, and finally, environmental issues.

#### **5.3.1 An Analysis of the Tourism Industry and Prevalent Tourism Management Practices in Brunei: Planning, Policy and Development Issues**

##### **a. Comprehensive, Coherent and Critically Focused Tourism Development and Planning in Brunei?**

A tourism strategy should be coherent, comprehensive and critically focused. It should be coherent because it should contain plans for implementation, which is sound and rational, and allow for consistency in its implementation. It should also be easy to understand by the parties who are involved in creating a high quality tourism product for Brunei. It should be comprehensive in the sense that it allows for all-inclusive planning by the planners who have consulted and discussed their plans with other parties such as the industry players, academics, hospitality providers, transportation representatives and most importantly, the community.

It should encompass the various functions needed to create a tourism product such as marketing, research and development, continuous improvement on product and services, benchmarking and so forth. It should be critically focused on the important issues that affect this industry, such as legislation, the MIB concept, socio-cultural factors amongst others. This section discusses whether the 3 Cs (comprehensive, coherence, critically focused) is applicable in Bruneian context.

Tourism in Brunei is public-sector led and private-sector driven. This means that it will have the problems associated by being a public-sector driven initiative as well as being an industry situated within a weak private sector. As this industry is still in its infancy stage, it is found that tourism development and planning strategies in Brunei have not been comprehensively considered, workable and coherent and do not critically address the issues that must be typically overcome in establishing a vibrant tourism industry. All this naturally translates into massive operational problems for tourism practitioners and intended benefactors. This will be discussed in greater detail in the next section.

Tourism is a very public and people-based industry. There is very heavy reliance on people as the service providers for other people. Awareness of national tourism strategy by the host nation's stakeholders' is therefore essential in moving this industry in synergy and tandem. This requires information dissemination of the policies, aims and action plans as well as the mission statement to be adopted by all involved. This information is usually presented in the form of a Tourism Masterplan or a Tourism Development Plan which is made accessible to all who wish to have access to it.

The researcher has found that in the Bruneian context this is not the case. Most of the interviewees admitted that they have no access to the Masterplan thus making it impossible for them to read it. However, most have heard of this document except for one person who was totally unaware of this national strategic document. Only three of the interviewees out of the 25 had direct access to the Masterplan and this was only because of their official capacity

as national tourism planners in Brunei. It was found that the earliest year in which interviewees first heard of tourism development in Brunei was in 1990 and the latest was in 1998.

The researcher also found that a majority of the interviewees had not been invited to participate in or contribute towards its formulation. This finding is supplemented by a comment made by one interviewee from the community who stated that it is probable that the Masterplan was not distributed to a wider circle because the tourism planners did not see the need to do so as those in the wider stakeholder circle had not been consulted in its formulation in the first place.

#### **b. Ineffective marketing practices**

Marketing of tourism has also been cited as an issue of concern leading to incomprehensive, incoherent and unfocused tourism management. This challenge within this process is related to four areas: marketing of the idea and tourism plans to the stakeholders, marketing to the intended tourists both locally and in the international area, marketing capability of the tourism planners and developers and lack of effective monitoring processes of marketing activities.

The marketing of the idea and plans for tourism to the stakeholders is seen as 'a failure' by some interviewees. This is illustrated through the aforementioned lack of publicity and accessibility of the 1998 Tourism Masterplan. This is a factor that has impeded dissemination of tourism information to those in the community and in the private sector. For example, the Temburong district was already preparing for Visit Temburong Year 2000 before they even knew of government plans to embark upon a nation wide tourism impetus. Not only does this illustrate the failure to market this activity to the nation at an early stage before 'springing it on the community', but also shows the level of unsynchronised planning that exists at governmental level and extends to grass-roots level. One should attempt to market tourism to the relevant

stakeholders to enable each the time to assess the situation and make adequate preparations for this event.

The lack of all-inclusive planning in this industry is because the industry players themselves are at odds with one another. There is 'failure to talk to one another or even consider the needs and thoughts of others'. This resulted in failure to reach a compromise or a midpoint whereby they can help each other to 'catch up' so that industry synergy is created which will create the right momentum to foster growth in this industry.

Marketing of tourism to the intended tourists both locally and in the international area is also a significant concern amongst the interviewees. Marketing to the locals is an important function because they are the doers and service providers of this industry. Not many interviewees, in fact only two, were aware of the plans to develop this industry before 1990. Most knew about it in 1997. The community-based interviewees admitted to knowing about these proposed plans for development in 1999. This is two years before the big tourism launch for VBY 2001.

In strategic terms, this is not enough time to make sufficient preparation for the presentation of high-quality tourism infrastructure and products. There is also very little time afforded to train and mobilise the right workforce. The problems related to tourism-related employment and training of the workforce will be discussed at greater length in a later section.

The Masterplan is also a marketing tool to sell the ideas to others. The Masterplan was considered a costly affair by some interviewees which cost around B\$300,000 (approximately £100,000). Some interviewees have voiced their concern that the cost of paying for such an expensive commissioned document is not justifiable if the right people do not use it because the tourism planners have failed to circulate this to a wider circle. One interviewee recommended that the document be made available to interested parties for a fee that would at least recoup the cost of its commission.

This lack of access to the Masterplan is indicative of the national habit of keeping public information 'secret' or highly contained. This public document should not be made 'accessible to a few of the elite' but must be provided to those who wish to know about tourism in Brunei especially prospective investors in this industry. If local investors are excluded from gaining knowledge from this Masterplan, then it may be concluded that other foreign potential investors also do not have access to this document. The potential for foreign direct investment into Brunei tourism industry would thus not be realised.

A few interviewees have referred to marketing of Bruneian tourism within the international arena. This is related to the marketing capability of the tourism planners and developers and the apparent lack effective monitoring processes of this marketing function.

There were mixed signals from the interviewees concerning the marketing endeavours that have been carried out leading up to VBY 2001. Some believed that the government was 'doing an excellent job' whereas others criticised it for being 'too few and far in between', 'too internally-focused' as the marketing advertisements were shown on local television and not broadcast widely overseas and 'too little too late'.

Some interviewees also had a chance to participate in various tourism marketing forums or were able to observe such marketing activities overseas and in the local arena. They gave a critique of their observations and pronounced that these marketing activities had received lacklustre review and interest from the attendees, which consisted of 'buyers' (i.e. tour operators and travel agencies) and the general public. The enhancement of the marketing strategy was according to one interviewee 'overdue' and suggested a more aggressive form of marketing.

It was found that interviewees perceived that awareness of Brunei as an attractive tourism destination is limited as international marketing awareness endeavour is severely limited by low budgets. An hotelier complained of the



limited budget given to promote Brunei compared to the RM25million and S\$20 million awarded to the Malaysian and Singaporean tourism authorities respectively.

Even the marketing endeavours carried out by the national airline, Royal Brunei Airlines were criticised by one interviewee. He complains of stiff competition between Royal Brunei Airline's own travel agency and the other travel agents, which leads to failure to produce a concerted marketing effort to place Brunei on the tourism hot spot list. Being a national airline it is the most logical marketing agent, which should be utilised to reach a wider international audience through its transportation of passengers from its global destination base.

On Royal Brunei Airlines, do they play any sort of media tape to tell you that in Brunei you can do certain touristic activities and that there are certain hotels you can stay in so if you have the time, why not stay in Brunei? That's what I'd like to find. I travel on Royal Brunei Airlines and they don't play those sorts of promotional videos. They are playing tapes for all over the world. Visit Brunei Year is in just a few months time and shouldn't they be playing just on Brunei? They have a section on Brunei, which is just about two to four minutes. After that, it focuses on other countries to which they fly. They should concentrate on Brunei. Everybody has a role to play and if everybody plays that role it would be the perfect plan.

The above comment signifies the depth of ineffective marketing of one particular agency, which has been carried out that, has failed to capitalise on marketing the tourism product to a wider audience. Marketers of the tourism product are not restricted to formal tourism players but also extend to the community. This will be discussed in the section concerning community involvement of tourism.

However, it was found that overall, the effectiveness of marketing endeavours carried out by the Tourism Department is impossible to evaluate, as there is no formal mechanism for monitoring success rates or failure rates. In an area where continuous improvement and monitoring is vital, important statistics, documents, evaluation reports are not made available to the general public. These explicit or implicit reports may exist but there is no effort to compile the separate pieces of information into a whole document. An interviewee from the business sector stated that although a monthly hotel occupancy rate form is submitted to the national tourism organisation, there is a lack of feedback with regards to the information given.

### **c. The implementation process**

The process of adopting the recommendations and proposals made in the Masterplan has been a slow and arduous process. An interviewee admitted that Brunei is not acting on these recommendations and thus has fallen behind the schedule of implementation. Some interviewees have admitted that they do not constantly refer to the document's recommendations as a guide. Rather, it was felt that as they were directly involved in this industry, they would be able to navigate along any developmental processes as they possessed the required industry knowledge.

The problem is in reconciling the conflicting interests and in creating a balance of trade-offs. Many interviewees strongly suggested that fundamental changes be made within its tourism planning and management spheres but given the contextual situation of Brunei, with its small Malay Muslim population, governmental inflexibility would undoubtedly exacerbate the bottle-neck of proposed changes to the system.

Tourism strategic management and implementation is an interactive and on-going process. It relies on thorough research and development, continuous improvement of product and service, benchmarking and constant competitor analysis. These functions cannot be done easily in Brunei because of the lack

of skilled tourism practitioners who can implement flexible strategic changes swiftly to cope with turbulent tourism market demands.

The disparate nature of tourism strategic development in Brunei is apparent through the analysis of its origins or specifically, the origins of its authoritative department, which is responsible for its development. Previously, it was under the Ministry of Finance until 1996 where many felt that it was inappropriately placed. It was only in 1996 when the Ministry of Industry and Primary Resources was established that tourism finally had a firm department that could control, monitor and develop it comprehensively. The transferral of this duty to develop this industry shows that the government has had in the past a very lackadaisical and perhaps ambivalent attitude towards its development.

Other examples have been cited which point to a lack of comprehensive planning in Brunei. This includes ineffective or lack of tourism policies governing this industry. The lack of a concerted and co-ordinated effort to develop this industry has been shown over the years when various tourism policies have been developed which fail to directly involve the true stakeholders of the industry.

Another example given by the interviewees is the lack of tourism policy development and an associated body or association that can create, co-ordinate and implement tourism policies is a massive barrier to developing this industry. At the end of 2000, the members of a properly functional Tourism Authority / executive board were yet to be assigned. The researcher was told on a few occasions that this body would 'soon' be established. It is very likely to consist of high profile senior government officials and prominent businesspersons.

However, an interviewee (a senior government officer) stressed that in tourism, 'the typical bureaucrat has to think and act like a businessman, which is very difficult especially when they have no experience of businesses. They are 'administrators not business players in a very competitive industry'. They

simply do not have the time to read the Masterplan and more worrying is the fact that they are simply not interested in this industry.

Many have other different official portfolios that are more demanding and more relevant to their official positions. These officials are more often than not 'told to sit on board' thus implying that they cannot readily decline an invitation to become a board member. The researcher found this to be interesting and revealing because not many people are aware of the selection process for membership to official high-ranking committees in Brunei as there is a lack of transparency in such processes in government. The interviewee continues to explain that their range of expertise and experience is not related to tourism. This particular interviewee understands that this will lead to very limited growth and lack of proactivity in this sector. He concluded that tourism in Brunei required clear leadership as a firm helmsman to guide 'the tourism boat' and not people who are 'spread too thin over too many things'.

Leadership concern in tourism strategic management is thus an important construct in this equation. The need for competent leadership is featured significantly in the interviewees' perspectives. The number of interviewees who have touched on this issue gives evidence to its magnitude in Brunei tourism. Many suggest that the government take onboard those with reliable knowledge and interest and clear leadership skills, people who could 'understand the intricacies of tourism' and 'not be afraid to rectify the situation if it goes wrong'.

Another point, which illustrates the lack of all embracing and through planning is the differences held between private and public sector interviewees. There is disagreement concerning the level of governmental support awarded to the Brunei Association of Hotels (BAH) and Brunei Association of Travel Agents (BATA). One tourism planner conveyed that there was strong governmental support for these associations but interviewees from these groupings believe differently. Some interviewees have stated that it is sometimes 'useless to talk to the authorities because nothing gets done so it's back to the drawing board'; or, that 'it takes too long

to get a response from the government' because they are also limited in their powers of administration as they have to be accountable to other departments and ministries as well.

Using the hotel industry as a valid example of governmental 'short-sightedness', some interviewees, in particular the hoteliers woefully complained of the low occupancy rates that ensued after the SEA Games and APEC were over in 1999 and 2000 respectively. These hotels were built in anticipation of the high international visitor levels for these events and were fully occupied during those times. The concern then was on what would happen after these events were held.

Immediately after these events and throughout 2001, the 'ghost hotel' phenomenon occurred when the anticipated tourists' arrivals failed to materialise and come to Brunei. The hotel rooms suffered massively through lack of visitor patronage and room occupancy rates fell drastically. Some hotels have reported that they achieved low daily occupancy rates (between 0% to 30%). This clearly highlights that the hotel industry in Brunei is in over-supply at current rates but in short supply when international events are being hosted in Brunei. This example also indicates governmental and private sector inability to overcome these operational problems when they occur and that they lack consistent contingency planning.

Ineffective communication channels also appear to be on the agenda. It was found that despite claims that decisions were communicated to the parties responsible for implementation; many are of the view that the process of tourism policy formulation and implementation still requires more open channels of communication. Thus a new mechanism for consultation is needed.

Theoretically, tourism development in Brunei is guided by the recommendations stated in the Tourism Masterplan. However, as aforementioned, many interviewees do not have access to this publication and thus are not aware of government directives in tourism. Even the very few

which do have access to the Masterplan have raised questions as to its feasibility. This challenges the notion that the 3Cs are fulfilled in Bruneian tourism context as even the relevant stakeholders are excluded from being effective and efficient contributors to the overall tourism chain of management.

Tourism should be planned, developed and managed in a coherent manner. However, as confirmed by many interviewees in Brunei, this is not the case. As one interviewee stated 'we do things differently here'. There is a tendency to implement policies suddenly without apparent prior preparation and it is usually on very short notice. As illustrated by an interviewee, interest in developing this industry was at the preliminary stages carried out in an ad hoc manner:

I think they should have started to develop tourism seriously since its conception in 1990 and it should have been done in a more cohesive manner. The forestry department wanted to develop it earlier but it was as usual on an *ad hoc* basis. There were coordination problems, and there was the problem of convincing others to get their support. The Ministry of Religious Affairs, Development and Finance should actually have been involved a lot sooner.

This comment illustrates the prevalent belief that coordination problems are rife and detrimental to this industry. It is also compounded by lack of political will power to execute tourism policies. It also highlights an opinion relating to a call for greater involvement of the Ministry of Religious Affairs in tourism. On the other hand, there are those who oppose this idea because 'religion and business should not be mixed together'.

Another factor, which impedes strategic implementation of these plans, is budgetary constraints. Financial resources to develop this industry are solely decided at the Prime Minister's Office, and rarely at ministerial or departmental levels. Those in the private sector acknowledge that they are 'heavily reliant on

government funding' and are 'under-funded' but access to much needed financial backing is an extremely difficult and long-winded process. According to one interviewee, this takes 'months and months' whereupon 'by that time, the window of opportunity has closed' for the tourism businessperson. This makes the flow of funds to create a synergistic and flexible environment in this private sector extremely difficult. This budgetary constraint has also been cited by the community-based interviewees and will be discussed at a later section.

The researcher found that there is a high level of resignation felt amongst many of the tourism players that tourism as a business and as an industry will remain lacking with regards to easy start up options and financial backing. An interviewee argued that the financial institutions in Brunei are themselves part of the problem in exacerbating this situation. He maintains that the banks in Brunei, despite claiming to be pro-business in reality are very reluctant to lend Bruneians the necessary capital to start up any business because of a long history of bad debtors. He expands on this by explaining that it is usually the 'ones with the money who can be the big players in tourism' and that the 'small players will always remain disadvantaged'.

Strategy execution is dependent on a knowledgeable pool of dedicated tourism implementers at all levels, from grass roots level (community level) to the highest echelon (national tourism organisation). Many acknowledge the enormity of the scope of work to be done by an under-staffed and inexperienced Brunei Tourism Department. Some interviewees called for the establishment of a fully manned Tourism Department or a Ministry of Tourism to monitor and manage this industry efficiently and effectively. As emphasised by an interviewee:

We just have a Unit, the officers are based in Bandar, but where are the officers in the rest of the districts? Tourism is not restricted to Bandar you know. They rely on the District Officers and the District Office to do their tourism jobs for them in the other districts. Their job is to simply assist the Brunei Tourism Department, if they want to, they help, if not they don't. The District Office's main

responsibility is not to develop tourism here. They have other priorities, not tourism.

That is why I ask whether we are truly ready for VBY. At least have a visible department or a ministry to champion tourism. If we really do prioritise this industry, if we really do believe in its viability then let's have a proper department for it or a Ministry.

The above comment succinctly highlights the grave need for greater tourism assistance at district level. The District Office is responsible for overseeing the development of the particular district. This includes anything and everything which the government decides to embark upon. An interviewee implied that many government officers at district level are not equipped for this job. The interviewee added that as they did not have knowledge of this industry, they were unable to cope as they lacked the necessary training and know-how.

He admitted that 'the meaning (of tourism management) is lost to us and thus if we do not understand it, naturally those below us will not. It's not our job to do this but somebody has too. There is anybody else to do it. We are just told to do things so we do it'. This comment is symbolic of the unilateral management that is practiced in government. Government officers cannot discard government directives and do not have the opportunity to decline this added responsibility. Unfortunately, there is no support facility or clear guidelines for the information distributor.

The assistance must come from those with industry knowledge who may then train others to become more equipped to drive this industry forward at district level. It is perceived that Brunei is not ready for such a big endeavour because the government has overlooked the need for a properly functional and powerful national tourism organisation.



#### **d. Stakeholder analysis**

A stakeholder analysis is highly recommended and essential in implementing tourism. However, this is a weak practice in Brunei. The researcher found that the web of stakeholders in Brunei with justifiable interests in this industry is very limited and narrow. It was found that even those explicit and obvious stakeholders and industry players do not have a firm knowledge of the identities of their own complementary partners in tourism.

As illustrated in the literature review, tourism stakeholder analysis can yield at least 43 active stakeholders from tourism planners to environmental groups. However, in Brunei, this is not recognized as such. Most people do not see the complementary tourism industry relationship between the hotels and cottage industries (such as food producers) as being interlinked. Rather they are viewed as separate identities and isolated businesses. This is due to the prevalent weak business linkages in Brunei which does not foster growth and a symbiotic relationship and existence.

Even those who theoretically have vested interests in this industry, but are not recognised as such, fail to identify themselves as valid tourism stakeholders because they may be too limited in recognising their product or service identity. For example, a restaurant is not simply a restaurant serving food and beverages; rather it could also be in the business of offering relaxation, ambiance and good local organic cuisine and drinks for the tourists. The solution here is perhaps to revise its mission statement and objectives and include its potential participation in the tourism industry within company strategy.

The data also showed that the number and extent of nature of stakeholders in this industry is also limited. Representatives for industry and other departmental sections or departments were not involved in the decision making process nor, were they involved in any other committees. Those interviewed were asked to give ten other names of people whom they felt had a right to consultation and this proved to be limited. Those whose names were

given had obvious vested interests in developing this industry. Their roles were limited to business or institutional matters.

This illustrates that the fragmented and segregated tourism industry in Brunei is such that even the main industry players are not truly aware of the other's roles in the industry. It is likely that those who are aware of the roles played by others are not aware of the depth of interdependence between the actors who in one way or another contribute to the overall service quality of the tourism experience. It is relevant here to cite the example given by an interviewee concerning the multi-linkages existing within this industry:

The tourist's holiday experience starts from the moment he purchases the holiday package from a licensed ticket agent. The flight on Royal Brunei Airways was excellent because of the good service received despite being a 'dry' airline (no alcohol is served on board the flight). However, he then experienced abuse from a sullen immigration officer, who told him to go back home to his home country for no apparent reason. The taxi fare to his chosen hotel was outrageously expensive at B\$100.00 (£35.00) for a two mile journey. The unsuspecting tourist can get fleeced here.

In fact there are regular fights between taxi operators who are all vying for the same tourist. The hotel, which he had booked into, was not a five star hotel but rather a three-star hotel according to international standards. We just do not have an international hotel classification system here in Brunei. The tour package around the city was enjoyable apart from the unpleasant mountain of garbage along the one of the main tourist attractions, the Water Village, and the ill-maintained Jerudong Park (the only theme park in Brunei). That's what we find; tourists tell us that it is a pity that there is a lack of maintenance for such a beautiful place. Overall, the tourist found the Bruneians as a pleasant race but was confused when he saw that most of the service providers (e.g.

front desk managers, waiters and waitresses, tour guide and shop assistants) were not Bruneians but mostly Filipino or Indonesians.

Since he is only staying in Brunei for a very short time only, as a transit visitor, his contact with the locals is limited. The overall product delivery is essential in getting that tourist to recommend others to come to the country. However, if something doesn't come up to his expectations, we simply aren't going to get the repeat visitors or new ones for that matter.

This comment aptly showed the interlinked industries from the ticketing office, the airlines industry, the taxi services, the hotel sector, the travel agent and the restaurants that both reinforce and support each other in this industry. The greatest resource here, which links all industries together, is the people who serve as the hospitality agents without whom the tourism experience and overall service quality would not be achievable.

It also highlights other problems of the industry namely ill-trained and discourteous government representatives with whom tourists need to come into contact with, the reliance on foreign labour to serve this industry and also the challenge of forging mutual relationships with the host people due to limited contact time. These problems have been frequently referred to by interviewees and will be discussed in later sections.

Operationalisation of this industry is compounded by lack of cohesive and consensual endorsement or adoption of tourism policies by those involved in this industry. This is because of an unfortunate bureaucratisation whereby the overlapping responsibilities of tourism development, planning and management are spread over various ministries namely the Ministry of Finance, the Ministry of Industry and Primary Resource, the Ministry of Culture Youth and Sports, the Ministry of Home Affairs. The level of involvement of these stakeholders is regarded by some interviewees as being unnecessary.

The Ministry of Religious Affairs is glaringly obvious in its presence in tourism development activities. As mentioned earlier, some interviewees believed that this ministry should be involved in this industry whereas others firmly opposed this idea because 'they have to act like a business when they clearly are not'. Perhaps they do not see tourism as an activity that is not permissible thus their level of involvement is voluntarily limited.

It was also found that it was problematic to analyse and evaluate the extent to which stakeholder recommendations were actually considered. Many interviewee felt that 'their voices were not heard' even when their opinions were sought by the NTO. This has lead to evident frustration with the current situation which have resulted in various parties 'blaming each other' when problems and conflict arise or when such issues are not resolved quickly.

Bearing all the issues and concerns of developing tourism in Brunei, this industry under current Bruneian context is not seen as being sustainable because of the problems of its implementation. As exemplified by an interviewee:

Tourism is not sustainable in Brunei at the moment. I see that it is not properly planned. People see tourism as if everybody can handle tourism. As you can see in Brunei, nobody is an expert in tourism. They have qualifications in economics. Even if you identify tourism, there is a lot of work. In terms of environmental issues, the economics of it, and so forth, the developers. They don't see it as being sustainable.

The above comment has been expressed by many interviewees who value proper tourism management and would like this industry to be managed by external tourism consultants. Effective and efficient management of this industry would lead to better economic benefits for Brunei and will be discussed in the following section.

### 5.3.2 The Economic Role of Tourism in Brunei

The researcher found that there is consensus amongst the interviewees that first and foremost, tourism development in Brunei is regarded as a means of economic diversification from the oil and gas industry. Tourism is seen as a necessary short-term soft option for economic diversification and that it will be good for Brunei in terms of local employment generation and increased income from foreign exchange.

Many interviewees also believe that due to current economic recession in Brunei, it will boost nationalistic pride and help bolster local morale in that 'Brunei boleh' ('Brunei can do it!'). Confidence and expectations are high for these 'quick fix' options in Brunei especially where livelihoods depend on this industry. This is however negated by a high level of wariness or scepticism by the others especially those from the community and the educators, many of whom are aware of its potential pitfalls including its weak tourism infrastructure, unrealised and unrealistic expectations, the threat of sustained financial leakage, inefficient transportation system, infrastructure and the provision of tourism-related goods and services.

There is valid concern from interviewees that Brunei may not be sufficiently ready for tourism due to its weak tourism infrastructure. Even the issue of tourism being a necessary activity in Brunei was raised as tourism-related facilities, manpower, transportation, venues and attractions are limited. It is a fear that Brunei will suffer acute embarrassment because of under-preparation of resources to develop this industry at present.

This is related to another concern from the interviewees who emphasise that despite tourism being lauded as a developmental soft option for Brunei with its relatively easy start up costs compared to other industries such as manufacturing, it may not be such a necessary option as projected by the government. It was suggested that perhaps the better option is to fully embrace the chance for Brunei to become an Islamic financial centre, embark on manufacturing activities or to develop its agricultural industries to allow for less dependency on imported food goods.

As discussed earlier, financial leakage can occur in any host economy actively undergoing tourism development. This is because the materials used for everything related to tourism infrastructure and its service provision may not be available locally but may be reliant on imported goods and services. In the context of Brunei, one can assume that this is already an unfortunate reality for the industry as much of the tourism products are based on imports which is draining away the cumulative benefits from the economy.

The researcher observed that many interviewees did not fully understand the concept of financial leakage. The researcher frequently had to explain the definitions in laymen terms to the interviewees without being too economic or 'leading' in the sense that this might unduly influence the perspectives from the interviewees. In some cases, some were unaware of this concept such as those interviewees from the community. The researcher deduces that this is because of their level of education and lack of understanding of basic principles of economics. Although the question on financial leakage is highly relevant in this study pertaining to tourism in Brunei, the researcher felt that this was one of the less successful questions because not many people have a firm grasp of this concept.

Some interviewees held that there is no financial leakage in Brunei. Even if there is financial leakage occurring in Brunei tourism, the economic benefits will far outweigh the level of leakage occurring. This however is simply a conjecture from most of the interviewees in the private sector who are more than willing to see this industry succeed.

A very acute observation raised by only one interviewee (the most qualified academically) relates to this matter. He surmises that if the one million tourist mark be achieved, it is debatable if tourism revenue can exceed the cost of financial leakages through the importation of touristic consumables for the international discerning tourists which cannot be supplied locally. He pointed out an associated economic concern relating to rice as a consumable product. Rice is a staple food in Bruneian culture and it has always been an imported good. Being a staple diet, the government has ensured that this commodity is

heavily subsidised. Restaurants and other eatiers in preparing the local cuisine using rice as a main component for this expected one million tourists is likely to literally 'eat away' the heavily subsidised profits for rice. The side effect may be an increase in the cost of rice per kilo for the local population.

The researcher felt that since this invisible and detrimental financial leakage is already part of Bruneian economy that has not been fully assessed and monitored, Bruneians have accepted it as a norm and have developed a lack of concern for it. The leakage will continually drain away the cumulative economic benefits of tourism from this small country for many years to come unless drastic action is adopted to curb this outflow.

Until 2002, the Brunei government has levied enormous taxes on all imported cars. This affects the transportation system and infrastructure for tourism in Brunei. For example, travel agents who offer tour packages in Brunei frequently supply the tour package using their own mode of transportation namely the air-conditioned coach. This is an easier option in terms of cost efficiency, safety and comfort for the tourists and insurance coverage purposes. One travel agent stated his dissatisfaction because the high taxation means that he cannot purchase new coaches readily to transport his tourists around. He suggested that the government give tax incentives, tax breaks or tax exemption for purchasing transport used in tourism businesses.

Many interviewees have also commented on the lack of maintenance and lack of variety of components of tourism-related infrastructure. Jerudong Park is the only theme park in Brunei. It is also the only free theme park in the whole world. It offered technologically advanced and state of the art rides such as roller coasters and 3-D rides. Once it was a source of national pride but it has been reduced to a source of 'embarrassment' for some travel agents. It was found that on the days on which travel operators brought tourists to the location, the park had to be closed because the lack of maintenance has made the rides unsafe. It was believed that this ill maintenance was due to severe lack of funding.

Another example, which illustrates the lack of maintenance, is the traditional Water Village whereby environmental pollution has not been monitored and had lead to degeneration of this historic and culturally significant village. Again, there appears to be inadequate budgetary access to help clean up the environment, which is made worse by an unhealthy habit of littering the water by village inhabitants and the general public.

Tourism is also seen as a spatial activity centred mainly in Bandar Seri Begawan and Temburong's eco-tourism parks. These areas are the most developed in tourism infrastructure. This means that in economic terms, jobs will be created mostly and tourism revenues will be reaped mostly in these districts. Overall, the economic benefits will go to these two districts. The economic effects will be minimal on the Tutong and Belait local economy. This is one concern that has been raised by those from the community.

An issue raised by many is the unfavourable business climate in Brunei. Despite calls to bring in more local tourists, the small population and domestic market means that tourism cannot survive based on local tourism alone. Brunei's tourism product is overpriced and unfortunately suffers from a lack of price competitiveness when compared to other Southeast Asian regions that have similar tourism products. This translates into unsatisfied visitors who expect and demand to have their price-value expectation fulfilled and even exceeded.

There were even examples of allegations of unfair practices within the industry whereby the national airline is accused of monopolistic behaviour by extending its products to incorporate a travel shop. This travel shop is a small travel agency that offers similar products to those offered by the other 43 registered travel agents. This naturally adds to further intensify the competition within the travel agent segment as these unfair practices are undermining the profitability of other travel agencies. This claim however has been denied by the airline company itself.



The relatively expensive cost of Brunei's tourism product and its small niche market translates into comparatively small tourism revenues. This revenue is spread between the accommodation, souvenirs, entertainment, sightseeing, food and beverages, retailing, amenities, events, transportation and other industries. It is debatable if the economic benefits can spread far and in an even manner, much less to the community.

Interviewees have also mentioned the lack of locally crafted souvenirs. It is hoped that tourism-related employment will be created within the traditional arts and crafts sector that will be the sole producer of high quality tourism goods and souvenirs. However, if the current practice of selling souvenirs prevails, which is not locally made using local sources; hence it is unlikely that a great economic impact will be felt.

### **5.3.3 Community Attitudes and Community-Based Involvement in Tourism Planning, Development and Management in Brunei**

Effective tourism stakeholder management implies the involvement of the community in tourism planning, development and management. It is widely accepted that the community has a pivotal role to play as the main doers and benefactors of tourism activities in any host country. The success or failure of any host destination in this industry is largely dependent on the willingness and readiness for its inhabitants to embrace the changes needed in developing this industry. The community must therefore be in a right frame of mind to will itself forward and create and implement the necessary complementary tourism activities to achieve national goals in tourism.

The research set out to explore if in the Brunei context the above points were realised or fell short of expectations. The findings seem to indicate that the latter is the unfortunate truth as evidenced by the richness and depth of insights from the community which painted a less than desirable picture of tourism management in their eyes. The community-based interviewees, who comprised of ethnic Malays from the Brunei-Melayu, Murut, Dusun and Kedayan groups, presented their perceptions of this phenomenon in honest

terms that the researcher found deeply significant and meaningful. An Iban perspective was also elicited.

As mentioned earlier in the literature review, there are six broad strategies that relate to how NGOs support community involvement in tourism. These strategies relate to policies and plans that aim to: provide information and increase awareness in the communities, build adequate capacity and increase confidence amongst the communities, establish effective networks, encouraging responsible tourism practices within the industry, promote and support responsible tourism behaviour and practices among visitors into the host community; and finally to implement conservation and development plans. These strategies and their related activities have been implemented to a certain extent in Brunei and to varying degrees of success as illustrated by the findings of the research.

The range of issues covered by respondents relevant to community attitudes and community-based involvement in tourism planning, development and management in Brunei is wide-ranging. First of all, the readiness of the community to make Brunei a successful host destination. It was recognised by the community-based interviewees that the community is willing and ready to participate fully in this industry because it 'a source of national pride' to them. Their eagerness stems from their desire to showcase local customs and traditions and does not appear to be profit-oriented.

Although 'high levels of community involvement and commitment in tourism planning, development and management' have been widely claimed by government officials and the media, representatives from the community believe that this is simply lip service. The data findings appear to concur with this claim. The data findings show that there are several constraints to their full participation. As an essential actor that adds value to the tourism product, the community has not received the adequate level of education pertaining to tourism. This responsibility rests with the tourism planners within their roles as educators and marketers of tourism development and planning policies.

It was found that despite the efforts to educate the community and increase their awareness of this industry, the tourism planners and developers have not reach a wide audience. It was proposed that the community receive tourism education and training from an earlier stage instead of being concentrated in a few months leading up to VBY 2001. The community received education on the positive effects and potential benefits of tourism such as job employment and economic benefits which will help to complement their monthly income. They also received instruction and guidance on the items, which they can produce to sell to tourists such as local handcrafted goods for souvenirs and on the activities, which they can hold to showcase their local culture such as performing cultural dances and songs.

It was left to the community's discretion on what to produce for VBY 2001, which was then endorsed by the national tourism planners. An interviewee counted four occasions in which he participated in meetings held with official government tourism authorities and the District officers in charge to discuss community tourism plans. All these took place in 2000 which is according to some interview participants, insufficient time for adequate preparation for this event and that many more meetings should have been held to solve any other conflicting issues or problems experienced by the community.

A criticism of the education and tourism awareness process was that the community did not receive training on how to market their products (e.g. local foods, arts and crafts souvenirs). This was essentially in terms of product packaging and pricing and promotion of these goods. The producer also determined the quality of the products individually. The guideline, which they received, was that the goods must be of suitable quality for sale to tourists and packaged 'nicely'.

According to one interviewee, perception of adequate quality is very subjective but he is careful to make only high quality goods because he wouldn't feel 'right' about selling low quality products as it is personally unacceptable to himself. Furthermore, he is aware that it would not encourage repeat purchases if he sold shoddy goods and thus there was no 'word of

mouth recommendation' by the tourists to others. He outlines the personal pride that he feels when foreigners buy his products as a showcase for his heritage and culture.

This signifies to the researcher that there is a strong sense of ethics actively being exercised by the community-based seller. However, this ethical selling behaviour is negated by some who claim that because there are inadequate levels of souvenirs to sell with proper product quality and standards, some sellers have resorted to producing these items overseas and simply labelling them as being 'Made in Brunei'. According to one interviewee, it does not really matter where the souvenir is made, it is more important that the product is readily available for the tourist.

The researcher realises that this action will prevent a wider multiplier effect from being dispersed throughout the economy if the opportunity for local made products is given to foreign vendors using foreign sources. It appears that for some operators, personal benefits and gains made in this business are more important than improving the livelihoods of others by spreading the multiplier effects.

On the other hand, an interviewee stated that he felt that the tourism planners and developers have succeeded in 'over-emphasising the negative aspects of this industry which have actually put them off it' or that 'the message sent to them was wrong because it was made to sound as if they (the community) could earn lots of money from tourism' whereas tourism is by nature a seasonal and fickle industry and is completely dependent on tourist arrivals.

Education and tourism awareness is therefore an important aspect which leads to improved living standards. A requirement of success is that the community receives adequate education about the benefits and disbenefits of tourism. The researcher has found that the tourism education for the community is an important issue, which affects community tourism development in Brunei. Tourism education empowers the community to be proactive in participating effectively in this industry to realise the potential

benefits of tourism and to minimise its disadvantages. Interviewees have repeatedly raised this theme in the research.

As discussed previously, doubts were already raised regarding the readiness of Brunei to be a host nation, for example, its lack of infrastructure in Brunei. An associated issue is whether or not the communities in Brunei especially those in the more rural areas are ready and willing to participate in its development. There are others who believe that community-based tourism cannot be applied effectively within the Bruneian context. Those who are involved in tourism planning in Brunei generated this viewpoint. It was felt that the community 'should only have limited say in tourism development, planning and management at the current stage of tourism in Brunei' and that they 'can only have a restricted role to play' because they 'are not capable of undertaking these strategic management processes'.

Some interviewees believe that the community at large has failed to see identifiable patterns for tourism development in Brunei. Some even expressed the opinion that the community cannot comprehend the depth and complexity of this industry, which unfortunately constrains their level of involvement in developing this industry. That is why their level of participation is seen to be low because they have 'failed to see the benefits of tourism thus have not exploited the possibilities as much'.

The reasons given for this belief is related to several issues. One of which is that the community have traditionally been a government-led and following official government policy is an institutionalised process. They are unused to taking charge of their situation because they have very little autonomy to do so which makes them inexperienced at self-development. This is a very relevant issue because for most Bruneians, it is generally accepted that government directives, policies, practices, even if they are inappropriate for the community, must be followed. This filters down to the Brunei cultural trait of accepting leadership without question. However, this can sometimes lead to conflict and disharmony in the community.

Another related issue is the channels of communication between the tourism planners at national level, at district level and at community grass-roots level. Amongst the participants of the in-depth interviewees who come from the community stakeholder grouping, a majority have expressed frustration at the lack of mutual consultation and communication between the local community and the government officials.

In one particular interview, the researcher found that the interviewee felt a huge sense of powerlessness and dissatisfaction because they felt 'sidelined' by formal tourism planners. It was agreed by some interviewees that an assessment as to whether the government is responsive to the needs of the community is difficult to gauge and that sometimes the government has been very slow in identifying the needs of that community.

Some believed that the government officials actually fail to do what the community wants or needs. The lack of a public or professional forum or arena in which members of the community may voice their concerns about tourism development is also an issue. Throughout the interview, the interviewee's unhappiness manifested itself in his facial expressions and body actions. Overall, the researcher felt that his expressions were most eloquent and knowledgeable amongst the other interviewed community members because of his professional qualification and high personal education level.

This lack of mutual consultation and communication is neatly illustrated by what has happened in the Temburong district. According to one interviewee, the year 2000 was already targeted as Visit Temburong Year. The community in the Temburong district had already established a tourism committee in 1998 to develop tourism at a much early stage before being informed of the plans for Visit Brunei Year 200. However, because the committee felt that it was somewhat inappropriate to develop tourism out of tandem with the government, this plan was postponed to coincide with VBY 2001 and they attempted to ensure that these activities were in line with and appropriate to the plans for VBY 2001. It was felt that the project implementation had to be decreased as a necessary step because they 'did not want appear to be

overly enthusiastic, ('terlalu berlebih-labih') when the government project was just a year ahead of their own initiative at district-level.

The potential backlash for being too enthusiastic was a critically decisive factor for the community in withholding the development of their area. The interviewees would like to be accountable for the area's growth and development but are scared ('takut') to do so. The desire for empowerment and ownership cannot be reached because of this factor. They did not want to appear insubordinate as this would entail community condemnation and perhaps even official reprimands at District level.

The composition of those entrusted with the job of community-based tourism implementation and planning is also a reason for the belief that community empowerment in tourism cannot be achieved. The Penghulu and Ketua Kampung (village representatives and leaders) are the representatives who direct and supervise community plans for tourism under the guidance of the District Office.

These men have been officially appointed by the government to become their own respective village representatives and leaders. They are mostly retired civil servants or teachers who, like the majority of Bruneians, do not have the necessary tourism knowledge and expertise or experience in managing tourism activities. This makes it sometimes difficult for tourism planners to convey the significance of tourism and also to transmit tourism knowledge to them. The argument here is that if those at community level who are entrusted with this job of promoting their community cannot complete their duties, then the whole plan will achieve low success rates.

On the other hand, one interviewee emphasised that this is not just a community-leadership problem but a problem at the interface level as well. Here the interface process refers to the communication process between the national tourism planner to the district office and finally to the community leaders and other members. The ideas, plans and processes for tourism development may not be fully understood by the middlemen, in this case, the

district officers. Naturally, there will be some loss of information transferral between these two parties. Therefore there is a loss of meaning and significance of the contents that must be disseminated to the wider public.

The district officers as middlemen are then expected to translate these instructions and relevant knowledge fully to the community leaders and public. Their tourism awareness is a 'subjective process based on their understanding of what has been related to them'. Hence, in the interaction process between the district officers and the community members, there will be further loss of knowledge transferral to the community. As revealed by an interviewee, 'their understanding of tourism is also limited so to pass it on to the community would also be of little value'. He drew attention to the fact that they are not 'trained to undertake tourism-related activities so to expect them to train and give effective guidance to the community would be like the blind leading the blind'.

This fact is well known amongst the community members who are worried about the lack of guidance from the government in this activity. This has made them feel uneasy and worried because they lack the confidence in the government to deliver its tourism promise of expected economic and social benefits.

One community interviewee, a respected Ketua Kampung (village leader) discussed the scope of information and awareness-building activities of the national tourism organisation. He remarked in December 2001 that he had only been invited to attend four meetings in the past year concerning this industry development and the ways in which they as a community can contribute. These meetings were hosted and chaired by the BTDU. No other external parties i.e. members of the tourism industry were present during these meeting.

As an on-going process, four meetings are not enough. There should be more meetings between the BTDU as coordinators of this nation-wide project and furthermore, there should also be industry representatives present during the



meetings. The industry players can then help clarify goals and objectives, provide assistance and guidance in setting up tourism activities to the community leaders. They can even set up small-scale collaborations or ventures with the community members themselves.

He readily admitted that he was looking forward to see the tourists because of the opportunity for marketing and selling hand made souvenirs which he had crafted personally. His sales venue would be the tourism exhibitions which the village has decided to hold during VBY whereby they will showcase their local heritage. He also had a contingency plan to sell his goods. If the tourists did not actually come to Brunei in the high numbers which had been forecasted, he hoped that he would be able to sell his crafted goods to the local population. However, he was somewhat sceptical about the potential of the domestic tourism sector as he was conscious that not many Bruneians themselves are aware of the tourism activities in Brunei.

The researcher found this particular interviewee to be fairly knowledgeable in his grasp of tourism as an activity. This was because the interviewee had participated in two study tours in the past few years, which had been organised by the District Office to regional countries (e.g. Malaysia and Indonesia). These tours are routinely organised by the District Office if annual budgetary allowances permits such outings. Those lucky enough to be invited are usually the village leaders. Although the primary aim of the tours was not discussed, the researcher suspects that these study tours was perhaps to create solidarity amongst the selected village representatives and the district government officials.

These study tour parties are almost usually male. However, a secondary effect of the tour was that men were able to experience being a tourist and can see ways in which they can improve their tourism facilities for tourists and perhaps to learn how 'not to do things' and thus to avoid unnecessary problems from arising in future. Their perceptions and experiences of the study tours have a direct impact on how they will shape the direction and nature of tourism product offered by their respective communities. As there

are almost no females invited on the study tour, their perceptions will be shaped by their masculine identities and beliefs. Even at community level it seems, tourism development is gender-biased.

Although tourism is supposed to bring about youth participation and community-wide cultural rejuvenation, the data findings appear to be the opposite for Brunei. It was found that most of the active tourism participants in the community appear to be from the older generation. According to one interviewee, youth participation in tourism is limited to 'handling the heavy equipment' and performing the cultural shows whereas the more senior members of society carry out most of the planning processes and implementation. One complaint related to increasing youth participation in this industry was their perceived lack of interest and that it was not attractive enough for the younger generation. It may be that community-based tourism in Brunei is an old age pensioner past time!

An interviewee who challenges the assumption that the community is keen to participate in tourism activities provides an example to substantiate his observation. Being an active member of the community through direct participation as a village representative, he observed that in many community-wide events, the attendees are the people who are usually the planners and managers of these events. He stated that most other members of the community preferred not to attend the village functions. He felt that in tourism, this would also be the same case, in the sense that the tourism planners, managers and active participants of this industry at community level would also comprise the same group of people.

The study also found that the relationship between the travel agents operating in Temburong and the local community is minimal. This is a point of contention amongst the community members who are angry that the travel agents refuse to work with them or even give the locals employment. It was found that the some tour guides are non-local Malays or even foreign workers. The interviewees regarded these tour guides as outsiders ('orang luar') who were not representative of the people from the area. Furthermore, it is alleged

that the non-locals do not have the rich ecological knowledge which are possessed by the locals themselves. This is a prime example whereby tourism has failed to generate the expected benefits for the local communities.

In Brunei, it is found that the predominant viewpoint is that locals especially the less educated ethnic and indigenous groups stand to lose out in tourism. The worry is that they may fall victims to unscrupulous travel operators and to other dangers of tourism caused by the destruction to their environment, lifestyle and culture. However, the author has found examples to refute this claim.

The interviewee from Temburong, in his capacity as a tourism committee member there was able to jumpstart building up a tourism business base in his own village by providing transportation services to the tourists on his newly crafted boats. Tourists were able to pay a transportation fee to tour the less accessible villages around Temburong. In this sense, there is a positive contribution to his lifestyle because he is able to gain some financial benefit from tourism development.

Another interviewee pointed out that one of his employees is enjoying a thriving home stay business in a remote village. His customers are from the employer's steady stream of tourists who have purchased the tour packages. His employee's decision to establish a home stay arose from the difficulty encountered when he was looking for locals to supply this hospitality service for his clients. The added bonus to this was that the interviewee could maintain the quality and standards of the home stay experience because there is already a beneficial and mutually rewarding relationship that has been established between the travel agency in its role as supplier of customers and the proprietor of the home stay.

The interviewee has also managed to create an edge over the others because of his efforts to create industry linkages between the locals and his firm. The interviewee's local partner is also offering a 'taman' (botanical garden) whereby herbs and plants used in traditional medicines and other uses are

cultivated. Here, the tourists are able to view the exhibited products, enjoy the live demonstrations of traditional herbal manufacture and even go 'herb' or 'plant-picking' in the garden. The focus here is on providing a relaxing and learning environment for the tourists.

Due to the steps taken by this particular interviewee in establishing and nurturing relationships with other tourism service providers, a small multiplier effect has been created in this instance. Despite the widespread fear and anticipation of locals being victimised and marginalised in tourism development, there are examples in Brunei which show that good practises do exist and provide others with lessons to follow.

The impacted communities, who believe that if they can benefit from tourism, will be more favourable towards this industry and thus be more proactive. On the other hand, there are those who do not see the benefits and naturally do not care to participate in it. Some interviewees also mentioned that there are some in their communities who 'cannot be bothered' ('Malas tah ku ingau') and those who 'just look and see' or in some case, do not even bother to watch the development of this industry. In Temburong for example, the people who are involved in tourism are only a selected few and it was their own interests in making arts and crafts which spearheaded this movement.

Some interviewees also deplored the lack of outside interest, the lack of community-wide participation and the complacency of some to 'just do nothing'. Some even lamented that 'the Penghulu and Ketua Kampung (village leaders and elders) have not shown real interest in this industry despite having been given some training or educational awareness on it'.

There is concern that if the appointed leadership is unable to cope with the responsibility of tourism development in their community, those who are interested in implementing tourism within the community are already being set up to fail. There is also regret that the enthusiasm which is needed from senior government officers in meetings is not transparent to the village heads which in turn transmits the signal to the latter that tourism really 'is not something to

be so excited or serious about'. This illustrates the importance of dedicated leadership at community level with the enthusiastic drive to promote tourism in the community.

The lack of faith from the community is also an important issue. An interviewee succinctly expressed why his faith was realistically low for this industry:

We do not have faith in this industry. It takes time to show to people that there are real benefits to be had in this industry. We cannot prove it to them just yet. For us, those who are active in tourism, if we stop doing this, it would be an embarrassment to us; we have to keep on going. We can only wait and see. If it does bring the benefits to us, Alhamdulillah (Thank God).

The above comment also illustrates the importance of striving for goal achievement despite the potential for failure because they would 'lose face' or suffer embarrassment if they discontinued their collective efforts. This concept is important in Brunei society.

The more educated community members realised the value of tourism awareness and knowledge but questioned who was really in charge of 'educating them on the benefits of tourism'. The community based interviewees wanted to educate others but had reservations on their legitimate rights to educating others and lecturing others on tourism benefits. The basis of power for this legitimacy was a concern for some interviewees.

The researcher was also again surprised by the 'fear factor', which emerged from the discussions. This was highlighted on three occasions when the interviewees stated that they were scared of being 'imprisoned' for being too critical or of being too 'subversive' or if they became too 'forward' in expressing their opinions on tourism. The researcher feels that this fear is misplaced and unsubstantiated and therefore must be removed from public opinion. This fear is not conducive to candid communication on what is right and what should be done in the host community with regards to tourism community development.

Some interviewees have observed the lack of visible preparations of VBY 2001 in the village homes, in the long houses. The hopes and aspiration of those communities who have decided to embark on tourism activities for VBY 2001 will be dashed as 'the preparations are made and nobody comes over to visit'. As pointed out by an interviewee, 'Kecewa jua masyarakat atu' (the community would be most disappointed').

An effect of the potential increased arrival in Temburong is an increase in transportation in the form of 'tamuai' or the long boats. In the enterprising spirit, some individuals have started making these 'tamuai' for commercial transportation because there simply are not enough boats to bring the people.

On the other hand, those in the industry themselves felt that 'the community understand tourism a lot' but are also 'very shy' about it. 'Shy' in this sense means that they are afraid of making the first bold step towards developing it themselves. According to one interviewee, the Ketua Kampung and the elders whom he had contacted directly were excited about tourism and about the prospect of earning extra money. The interviewee stressed that in his personal discussions with the community, he had pointed out that tourism is not something that will 'change their lives and allow them to quit their job' but will help get them extra income. He explained that he covered the seasonal issue with the community members. His invitation to participate along with him as a business venture to that particular community was only received by one family. This family started to act as hosts to tourists and has since then created a mutually beneficial relationship with this particular interviewee.

The interviewee contributes extra effort that is needed to set up anything in preparation for guests' arrivals as being a main contributor to their reluctance to become active in this industry as home stay providers. He felt that people were simply comfortable and they did not want to change because it was too much hassle for them and that they had too many excuses to start up home stays. However, he felt that it would not be appropriate for him to force their participation as it is their immediate environment and that one should respect that. He continues to elaborate that in this instance, he does not believe that

there will be a tourism impact on them as it will be limited contact to the certain few members of the community who are willing and able to set up home stay businesses.

An interviewee raised the issue of appropriateness, time scale and suitability of tourism development for the community. As an on-going process, building tourism awareness should have been conducted more than five years in advance of any major tourism launch. For example, the tourism drive in Malaysia was started five years prior to the launch of Visit Malaysia Year 1990. However, he pointed out that despite marketing campaigns that portrayed the indigenous people in Malaysia in the first VMY campaign the benefits of tourism did not actually reach this impacted economy rather to the developers. This exploitation is one, which the community is keen to avoid. Tourism is not just for the enjoyment and satisfaction of a few but this should extend to the local people as well. This will naturally result in responsible and sustainable tourism whereby there is little hostility between stakeholders as their needs and wants are reconciled.

An operational challenge illustrating an obstacle to effective community empowerment in tourism is related to a legal issue. Those from the community believed that the indigenous groups should be allowed to capitalise on their rural location and beauty and heritage. For this, they need to have legal rights to do so. An interviewee brought up the subject of project and license approval processing in Brunei. He who aptly questioned the legality of establishing tourism, which is community, controlled and owned when such approvals made by them will be rejected due to financial and legal grounds. Associated with this is the slow approval processes undertaken by the relevant authorities which excludes community applications. It appears that there are policies enforced which prevents community involvement and participation in tourism which must be addressed and rectified by tourism planners.

The budgetary constraints discussed previously also feature heavily in the community-based interviewees. The researcher feels that it is necessary to

include the comments made by an interviewee who outlined some of the problems related to developing tourism at district level as experienced by local community members with regards to gaining financial assistance in state aided tourism:

Sometimes, when we go to them asking for help on various issues on tourism development, especially about the tourism activities, which require financial support, they are tied up by bureaucracy and other conditions. They say that their decision is dependent on this and that; various conditions have to be fulfilled before they can help us. Our agreement with Brunei Tourism Department is not very active; they just tell us to wait. We keep on waiting for their decision. For example, budgeting. We have a budget for the districts, but it is as yet to be received. BDEC (Brunei Darussalam Economic Council) can help in tourism to upgrade a few things namely infrastructure here in Temburong. These were tendered to be completed by this year-end but in reality, these things have not even been started for example, toilets for tourists. However, the budget is here, but nothing has been done. VBY is just a week away.

We have B\$25,000 to spend on VBY here in Temburong. That is just on paper. They have not given it to us as yet. They expect us to pay for it first. In Temburong, we do not have that kind of money. We cannot buy them. You cannot expect us to pay for these things and reclaim the costs from the government. It is not feasible. It boils down to the preconceived idea that we are incapable of proper budgeting and spending of district finance. Why not allow us some money in the first place? We can submit to them a list of items to purchase detailing the costs, and when we have bought them, we send it to them as proof of purchase. They expect us to pay for it out of our own pockets and then claim it back. How can we do that? We are not rich people here. We are volunteers. Even though we have been given \$25,000 if it is not in



our hand, then that means that it is not there in reality. How then can we prepare?

If we buy those things, it is not confirmed that we will be reimbursed because we do not have the agreement in writing with us. It is only with the District Office. Thus all this management, or the lack of it, makes us trust them even less. We have less faith in them. This is the phenomenon that we are facing in tourism. It is a big question as to whether, we in the tourism committee can further move forward under these conditions?

This implies that tourism management, development and planning flows in a unilateral direction only, from top to bottom management. There is evidence that there is very little scope for the community to take control of this industry at district level as their actions are limited by government bureaucracy.

The realities of tourism for the stakeholders in Brunei have many implications. It has been in its infancy stage for a long time and is destined to remain the same if drastic action is not taken to overcome the losses incurred in the process of developing this industry. Are the costs justifiable under the current situation? This begs the question: what is tourism for the development and the well-being of the people of Brunei? This is one such question raised by the interviewees who fall into the category of 'less empowered stakeholders'.

The real measure of success for tourism development in any host nation is whether or not tourism benefits its local community by improving or enhancing its quality of life. Bearing in mind the operational problems that the communities have encountered in developing tourism, some have questioned if tourism development is truly going to benefit the community or if it will only benefit 'the elite few' or the 'fat cats' of the industry. There is evidence that there are problems in instilling community confidence and thus commitment in participating in this industry that will have a detrimental impact on its survival. The previous mistakes of other Southeast Asian nations may be learnt. That is the beauty of being a late entrant into this market.

#### **5.3.4 Socio-Cultural and Political Processes and Issues Affecting the Bruneian Tourism Industry**

One issue, which repeatedly arose during the interview, was the impact of tourism on Brunei's fragile socio-cultural milieu. This is expected from such a nation that emphasises strong cultural adhesion that is the backbone of a collective society. Morals, ethics, religion, tradition all impact on society and its culture. This is a very highly treasured possession in Brunei and in the past Bruneians has been very resilient towards cultural exchange.

One example is the government's decision to protect its community from the potential negative effects of the Internet (e.g. access to inappropriate websites) by prohibiting it and then limiting it in the past. The government took the stance to protect society instead of viewing the Internet as an educative tool and communicative medium. However this service is now easily available for the general public. Ironically, this same tool is used to put Brunei on the map as evidenced by the websites dedicated to tourism promotion hosted by the industry players in this country (e.g. the national tourism organisation, travel agencies, hotels and other businesses).

A community member acknowledged that acculturalisation, is a two way process with either host nation impacting a cultural influence on the tourist or vice-versa. The danger is that if harmful, the effects will destroy the society. In protective and traditional society like Brunei, this is unwanted and undue influence. It may lead is to a change in thinking from traditional values to more modern perspectives i.e. the creation of a mode of thinking that is different to existing and accepted societal thinking and norms.

The change will occur more from a mental perspective as opposed to being visibly manifested though simple things like having a preference for western clothing. This change may manifest itself attitudinally as the typical Bruneians may become more 'materialistic'. He also felt that perhaps, as a result of a payment system to view the 'cultural other', indigenous groups such as the Murut or Iban may 'expect payment for every single thing that they do' if

tourists enter their house. This defies the innate hospitality of the people to do things for the honoured guests and may prove to be a concept that is detrimental to its social interactions with others.

However, it is accepted that culture and its components namely, values, norms and traditions are understood to be enduring components of society. Certainly Malays have set cultural patterns that may be difficult to change. In the Temburong district for example, an interviewee commented that the community there would not tolerate unrespectable behaviour from tourists. He quoted an incident whereby a tourist was politely asked to cover up his legs as he was only wearing shorts because *it* would 'tarnish the respectable image' of Temburong and its people.

#### **a. The Relationship between MIB and Tourism in Brunei**

The values of 'Melayu Islam Beraja' ('Malay Islam Beraja' or 'MIB') are held to be the glue which sticks Bruneian society together. It is applicable in all forms of governance and was officially endorsed as a national philosophy in 1984 as decreed by His Majesty the Sultan of Brunei on Brunei's First National Day. The central tenets are that Brunei shall forever be Malay dominated and governed country that upholds the principles and values of Islam at its core. However intrinsically understood this concept is, its conceptualisation is quite vague and lacks concrete definition.

MIB is accepted as a guiding principle in Bruneian society. They recognise its value in national government but some have conflicting views about its applicability in tourism. As illustrated by an interviewee:

I am not trying to be critical but I have heard of statements that the Brunei government is trying to be more Muslim than the Saudis because of the alcohol ban and things like that. In Oman and Malaysia you can drink. These countries are very successful in tourism. Of course there are certain social issues in their countries

like here as well but the thing is it can be done. You can integrate both tourism and religion. But at the moment it is just closed off.

Another interviewee however suggests that 'MIB is the operating system' which tourism planners and developers have to act in and that it can help to develop tourism and not limit tourism. He explains in depth that a motivation to travel is to see beauties, which are God's creations which should be the case in Brunei. However, he does not consider a need to spread MIB principles and values to non-locals. Rather, the acceptance and understanding of tourists of this concept as a focal principle in Brunei's life would suffice.

However, most interviewees do not have a concrete understanding of this concept. It is 'simply a way of life' which defies conceptualisation but has far reaching consequences on daily life. This belief is illustrated by the following comment:

This relationship (between MIB and tourism) to me is not clear, it's vague. Do we want the tourists to come here and follow our MIB lifestyle or leave them with their own culture? Our tourism theme is MIB and may actually be a barrier between them and us. They come to us to relax, to have pleasure; surely we shouldn't force them to do this and that. However, there are certain measures that must be tightened according to MIB.

Food, alcohol, liquor, nightclubs and so forth are of course controlled items. But if we were to have the MIB theme endorsed in our tourism, we should make it very clear to tourist coming over here. Tourism must only follow MIB principles; it should be maintained as such. However, people may feel that to become involve in tourism is very limited due to such restrictions but these tourism activities can only proceed if we uphold these principles.

The above comment refers to a common suggestion to ensure that Brunei's tourism industry is managed in a permissible or 'halal' manner. However, there

is a dilemma between accommodating tourists desires and wants whilst preserving the local identity and sensitivities of this culture.

The potential for abuse of power was also discussed. There are others who believed that some top officials have used the MIB principles to exert executive power over the people. The MIB principle entails respect for leadership and acceptance of their vested powers and endorsed legitimate actions. However, this does not allow a leader to abuse their powers to gain from tourism. This is related to the high potential for powerful business or government persons to benefit the most from tourism revenue thus minimising community wide economic benefits.

Many Muslim interviewees agreed that the Islamic principles override everything in life which reflects the religiosity of this nation. The philosophy and its adherence depend on the person's religiosity. If this idea has deep significance to his or her life, it is natural to have this cornerstone as a point of consideration in tourism.

### **5.3.5 Tourism-Related Education in Brunei**

The education process at first glance appears to have worked successfully but public opinions differ. In reality, the great public awareness campaign has not generated as much awareness as it was intended as previously discussed in community involvement in tourism.

Many interviewees recognise that tourism and hospitality training and education for locals in Brunei is limited. The issue is not simply delineated to the availability of the provision of tourism and hospitality training but also to being the provider of training. This industry requires efficient and effective trainers but the number of fully qualified trainers in Brunei is very few. As explained by a tourism educator:

It is surprising when people ask me what I do; I tell them that I teach tourism studies. They ask me why I need to teach tourism.

They laughed. It is not a proper subject. Some think that tourism is just serving, not really working, just being a travel agent, and being in the hospitality industry. You can work as a planner, it is more than that. They should be taught that tourism involves more than what they believe, e.g. as a zoner, as a manager. They should be taught these things.

This neatly illustrates prevalent views that tourism and hospitality is regarded as a simple activity as opposed to being a proper 'academic' subject. Tourism in this context is not an academic subject but rather a vocational one. This has yet to be understood by a majority of people in Brunei who has a basic preconception of tourism that involves the provision of services in hotels and restaurants which is 'something that anybody can do'. This is incorrect. Proper hospitality and tourism-related skills such as front desk, reservations using the ABACUS system (international travel booking system) requires basic training and accompanying skills which must be learnt either through in-house training or from formal institutions such as the MTSSR.

Many interviewees have stressed that it is essential for any host community to receive training on the service industry so that they may learn to become more hospitable and thus maximise tourist satisfaction. Some interviewees have also raised the recent spate of publicised bad conduct of some airport immigration officers who have tarnished the image of the country by their unprofessional and discourteous behaviour towards visitors to the country.

It was widely acknowledged that tourism education should ideally start from the elementary school level to familiarise the younger generation with the concepts of tourism such as sustainable growth for future generations, ecotourism, the benefits of job employment within this industry and so forth. This would be a precursor in changing the mindsets of local Bruneians to this industry who will then grow up to practise responsible tourism either as a host or as a tourist.

Tourism education providers must also ensure that the quality of recruits into the courses is of the right calibre. This implies standardised recruitment and selection procedures at national level for all vocational schools that offer tourism and hospitality-related programmes as proposed by an interviewee. As observed by two interviewees, in the past, different selection methods have been used for student selections which have not lead to significantly improved and competent graduates.

The research has also found that initially some industry players regard local-trained tourism or hospitality graduates to have lower standards of training and skills. When the local institution for tourism education in Brunei, the MTSSR, first started its programmes, there was little support from the industry, namely the hotels. This was because the industry believed that 'kampung-style' or 'village style' training would be given for the locals. This is a bad reflection on the MTSSR as 'kampung-style' training implies sub-standard, basic and unsophisticated levels of training and skills. This highlights the belief that the industry regard the standards of tuition provided is of low quality primarily because the locals would receive training under a local lecturer. In MTSSR however, there are international members of staff who also provide some of the training.

This negative assumption has created two unfortunate scenarios: lack of faith in local teachers and also lack of faith in the end product itself i.e. local trained students. As an interviewee pithily observed, local trainers tend to have greater interest in their jobs because they are responsible for the development of their own nation whereas some international trainers may not have the same motives and are working in Brunei simply because of the high wages afforded to expatriate trainers.

A counter-argument was provided by an interviewee who adamantly denies that 'kampung-style' training was given to locals. According to the interviewee, the foreigners employed by the hotels in Brunei usually have very little training in hospitality. Rather the locals have greater skills and have received more

training than the former. The foreigners usually only receive in-house training whereas the locals receive both in-house training and vocational training.

He quoted examples whereby MTSSR students undertaking their industry work placements in hotels were shocked by the bad housekeeping practices actively adopted in quality hotels in Brunei. These include the use of bed linen with holes on newly made up beds in hotel guest rooms.

The APEC Summit in 2000 also helped to provide high levels of hospitality training for the students. To cope with the hospitality demands of hosting such an event, intensive training was given to volunteers and students at MTSSR covering front desk, housekeeping, food and beverage, cookery and so forth. The training was provided by the Canberra Institute of Technology (CIT), an Australian educational institution with the cooperation of the MTSSR. Some interviewees have observed that the on-the-job training opportunity given to the local students under APEC was invaluable and have enriched their levels of skills training quality. Some interviewees believed that these local students are highly marketable as potential employees in international hotels outside the country as their skills would be on equal if not greater par than their counterparts. The acceptance of many local hotels and restaurants in readily absorbing the graduates from these courses marks a change in attitude as the industry gradually recognises the high level of skills given to locals in the local institutions.

There are still others who do not share this belief and who still regard the level of education provided and the calibre of the graduates from these courses to be of low quality. This is despite the students receiving active training and industry work placements in established hotels and restaurants throughout the country. Their training is also undertaken within the training restaurant in the MTSSR itself. Furthermore, many industry players believe that the number of local trained graduates cannot fill industry needs within the foreseeable future because of the limited number of annual student intakes and graduates on these programmes.



An interesting issue that was found related to the attitudes of foreign workers themselves when they are placed in a position to educate the locals. Some interviewees have observed that conflict tends to arise when local tourism or hospitality students are sent to hotels or restaurants for their six month long industry work placements. This is when the locals mix with foreign workers. There is an apparent gap in expectations between the supervisor of the hotel and the expectations of the students and the vocational trainers as well. There is also a cultural gap that exacerbates the situation. This is where the breakdown of communication arises which leads to conflict and unsatisfactory work performance from both sides. According to an interviewee, these conflicts have resulted in fighting (e.g. verbal fights to flinging pineapples at the opponent) between the foreign staff and the local students which required immediate resolution.

This is because the students are seen as direct competitors for foreign jobs in Brunei. The foreigners who are directed to train and supervise the students do so unwillingly because they do not acknowledge this role as part of their job description nor their job specification. They are wary of locals because they are threatening their jobs which will force them to find re-employment elsewhere.

The wide range of expectations held by the different actors in their roles as tourism educators or tourism education recipients need to be reconciled to ensure that there is constructive synergy that leads to mutual harmony, the achievement of goals and objectives and more importantly, create a fruitful environment for continuous learning and training regardless of nationality and locality.

#### **5.3.6 Tourism-Related Employment and Gender Issues in Tourism**

According to the Masterplan, an estimated eleven thousand jobs will be created in tourism that is directly related to the tourism industry. Many interviewees acknowledge its strong potential as an employment generator but question if this figure is sustainable and achievable.

Prevalent attitudes towards working in the tourism and hospitality industry pose as major setbacks in cultivating long-term local employment for Bruneians. This industry is perceived to be undesirable for females due to typical work shifts which involve night shifts and travelling. An interviewee discussed the fact that it is necessary to employ foreign labour in the hotel industry because many parents believed that hotel work is not 'ideal' for their daughters. This limits the local labour pool if young women are prevented by parental disapproval from effectively participating in this industry. He emphasised the need to educate the parents, so that they do not 'panic' when their daughters are on the evening shifts. The interviewee also envisioned a change in attitude within the next two to three years whereby more parents will allow their children to work in the hotels. He also noted that it was only five years ago that Bruneians were first seen as doormen at the local hotels whereas previously, 'they would not open and close doors as it was too embarrassing'. Another interviewee highlighted some of the downside to working in this industry for the local employee:

Most of people think that tourism jobs are not prominent long-term jobs for example stewards, stewardess and working as travel agents. Most of them retire early, the women get married. I can see that now the older people are now encouraging their children to work in this industry as they see the potential and opportunities. I don't think they are so many problems as before. Maybe some of the typical fathers only. My sister worked in RBA as a Public Relations Officer, which involves travelling. My father told her to stop working.

The above comment highlights several issues: the short-term work prospects within this industry, changing attitudes to job employment in tourism and gender-biased work practises whereby women are expected to retire after marriage and childbirth. These issues are relevant to the way tourism is managed and planned in this country.

Another problem in fulfilling the objective to generate local tourism employment is that the private sector perceives that locals are ill-trained, and ill-equipped to do the jobs in tourism thus forcing them to continue to rely on imported foreign labour. This practice is not in favour of government initiatives that aim to reduce foreign labour dependency in Brunei by limiting foreign work quotas. As commented by a travel agent:

The government, especially the immigration department, must recognise that we do need foreigners to do this work. Sometimes. Because we don't have the people. Sometimes others can do this work e.g. Thais because they are prepared to work longer hours. Let the people who are willing to do it, do it. At the moment, we can't get work quotas. It's very strict here. At the moment we have six thousand unemployed, they tell us that out of this number, they are sure we can find somebody to work as tour guides. The sad truth, is there isn't.

Comments made by the interviewees revealed that apart from this negative perception, there are also poor management-labour relations concerning workers' rights and wages enforced within this industry. Industrial relations in Brunei are known to be poor and this provides evidence that this is also true of this industry. An hotelier believed that many locals are reluctant to work in hospitality services because they are not entitled to many welfare benefits, which is awarded to those in the government sector. There also appears to be a 'hire and fire' policy whereby incompetent workers, irrespective of their nationality, are subject to immediate redundancies without effective compensation or notice, according to interviewees in the industry. This is not acceptable to many Bruneians who tend to prefer the security afforded by long-term employment.

Although many interviewees deny that there is any gender bias in this industry and that employment is not restricted nor limited by one's gender, ironically the views expressed contradict this belief. An interviewee who provides tourism training and education accepted that most students or the students enrolled on

the hospitality course are female and that only four male students participated on the course in the first year. By 2000, the number had risen to seventeen males undertaking the course, which indicates increased qualified male participation within the industry.

Others suggest that women should be placed in housekeeping, cooking, and laundry or chambermaid positions. The roles which women are expected to fill in this industry is similar to the roles traditionally played in a domestic situation. This attitude appears to be a dominant perception between both male and female interviewees. This is a very revealing discovery which serves to show that Bruneian society is very much a traditionally gendered society whereby societal thinking still sees the woman in the kitchen or serving in similar domesticated roles in the industry.

A reason given as to why men cannot be employed to serve the domestic duties ranged from men's natural strength over women's, to the working hours and even to their looks. The interviewees believed that men were more capable of doing heavier work such as being a concierge, door-man and so forth. Women were 'much weaker' and thus should not be burdened by doing heavy-duty work. Workings in shifts were also quoted as reason as to why women should ideally remain in domesticated roles. For example, chamber maid work and cleaning duties are mainly carried out in the mornings and afternoons; these duties do extend into the night shift but is less frequent. The woman as a chamber maid is able to tend to her family when her shift is over in the afternoons. The implication here is that the woman's domesticated role is not just limited to her external work environment but she also has to serve these roles in the home.

An interviewee raised the issue of appearances in this service industry. He commented that 'most people do not want to be served by men, they prefer the pretty, soft looks of a woman serving them...it's nice that way. Men simply cannot do the jobs that women can do because they cannot do it as well as women can. They just do not look nice anyway; it looks strange.' Women, it appears are relegated to remain in low paying jobs serving domesticated roles

as laundry help, chamber-maids, house-keeping personnel and so forth. To the researcher, this also means that to a certain extent, there is some degree of exploitation of women in Bruneian tourism which has also been found in other investigations concerning gendered tourism practises.

The researcher also found that the participation of women in tourism-related governing committees under the direction of the Penghulu or Ketua Kampung is also minimal. Therefore even at community level female participation in tourism planning and development is negligible. Perhaps if women participation was more encouraged and allowed the face of community-based tourism may have different component in it.

### **5.3.7 Environmental Issues**

Tourism by nature is a highly visible industry. The benefits and ill effects of tourism development are clear to see such as environmental degradation. Thus it is natural that this issue would arise in any topic of discussion in tourism. It was found that many interviewees exhibited concern for the environment, which is the single largest resource used in this industry. An issue related to proper maintenance of the environment and that industry players must 'take care of the environment and not enter this industry motivated purely by the idea that there is so much profit to gain'. Furthermore, 'one has to take care of the environment for future generations and not destroy it for personal gains' because this inevitably shortens the life cycle of the industry.

Tourism as an activity is seen as 'a responsibility for all' on a nationwide basis as opposed to falling on individual or corporate shoulders. The participants of this survey acknowledged this responsibility but what is absent is the accountability towards the environment. Much of this focus on accountability and responsibility is on being responsible for the people whereas more emphasis should be directed towards the environment which is the same resource that is being heavily exploited. Most people viewed sustainable tourism practices to constitute towards being responsible to a certain degree

but in a country that lacks environmental awareness and pro-environment friendly practices and customs, this is a massive challenge in practising meaningful and significant tourism activities, which does not endanger its host environment or people.

The researcher found that there was a high level of concern for environmental protection from those who lived near areas which are actively promoting eco-tourism. There is awareness that once the environment is destroyed or damaged, it will take years for the damage to be rectified thus making the area unattractive not only to the local inhabitants but also to tourists.

However, a perspective from an interviewee who lived near the airport commented that she did not want the airport to be expanded, as it will affect her community area by increasing the level of noise pollution. Another environmental issue that was highlighted focused on public littering. It is found that most interviewees regard this habit distasteful and harmful to the environment and will negatively affect the tourism product especially for eco-tourism. However, people still do litter in public places. It was recommended that socially acceptable and environmentally responsible behaviour should be instilled within the community to ensure that the environment is not polluted but maintained. This example highlights the need for increased tourism awareness activities within the community.

With regards to environmental policy, there is a severe lack of holistic environmental protection policies to cover this precious resource. A travel agent highlights her concern for poaching and illegal logging activities, which is destroying the fragile fabric of the environment and thus jeopardising the eco-tourism industry. She pointed out that policies regarding forestry and wildlife protection in Brunei is carried out by two separate departments in separate ministries namely the forestry department and the museum department respectively. Hence there is a lack of monitoring and enforcement power over environmental protection issues because these two departments do not co-ordinate their efforts collectively.

An interesting issue found in the study relates to environmentally conscious tourists and responsible tourist behaviour. One interviewee explained how she actively promotes her western tourists to pick up litter during their jungle adventure treks and during their home stays. The educated tourists are perceived to be more environmentally aware and responsible. Her aim is to provide quality visitor and host interactions which creates better and mutual understanding thus enriching the experience for both parties. She is highly aware of the dangers of exceeding the environmental carrying capacity or load whereby excessive human intervention through repeated visits to the local ethnic community will jeopardise the lifestyle of the people. The researcher felt that this environmentally conscious decision to focus on quality and not quantity was not as widely adopted by other industry players who seemed to be more money oriented and less concerned with environmental issues.

In summary, the researcher believes that the environment is not a particularly important issue to many participants. The researcher is left feeling that despite their concern about the environment, concern about the potential economic benefits that may not be realised is a more over-riding issue. This is because general environmental awareness in Brunei is systematically lacking and that Bruneian society has changed such that there is greater emphasis on improving one's quality of life through value-added activities such as tourism or business.

#### **5.4 Summary**

The data analysis showed that many interviewees were highly critical of the issues addressed in planning for tourism development in Brunei. They also exhibited concern for it planning, development and management. It was found that many interviewees were concerned with several issues: the actualisation of income generation, safeguarding Brunei's cultural identity, potential for financial leakage, and fair distribution of financial gains for the community,

environmental protection and the dangers of ineffective and inefficient tourism strategic management.

Overall, the research data findings were felt to be rich enough to gain an exploratory insight into the intricate and misunderstood tourism industry in Brunei. The conflicting perspectives between tourism practitioner and the community member were neatly exposed by the honest opinions given in the quest to find the truth and realities of tourism and its meanings to the individual.

In 1998 up until 2001, this industry has been hailed as a good means for economic diversification. However, the researcher has noted that in January 2003, tourism has been downgraded to the status of a 'cluster industry' only in Brunei as opposed to being a major income source for this country. This is because of the apparent lack of success which the industry has achieved in 'Visit Brunei Year 2001' which fell very short of its targeted 1 million visitor arrivals. The researcher's conclusions on Brunei's tourism development is that the year long project did not bring about the expected material gains and multiplier effects nor did it significantly improve the quality of life for Bruneians as a whole. Tourism in Brunei has suffered from the side effects of many disastrous external negative geopolitical phenomena which are beyond its control. This includes for example, the threat of terrorism which affected international travel and increased market competition from other neighbouring countries. Research needs to be undertaken to fully justify this conclusion quantitatively but this has been what has been reported in the newspapers in Brunei.

The above data suggests that there is plenty of scope to create a balance between suitable and acceptable trade-offs to invigorate this industry. The researcher concludes that partnership amongst all explicit and implicit stakeholders in tourism development in Brunei is essential to ensure that this infant industry matures further. Much has to be done to ensure that tourism is a competitive and sustainable industry that truly justifies government investment. However, this requires effective and proactive government policies



formulated through mutual consultation with stakeholders and implementing the necessary follow-up measures such as benchmarking to ensure that tourism objectives are monitored and realised.

The high degree of consensus found during the qualitative research is also reflected in the quantitative study. This justifies the validity of the study because both implicit and explicit stakeholders share the general perception of tourism development and planning in Brunei. The congruent findings will be discussed in the next chapter.

## **CHAPTER 6**

### **DISCUSSION OF KEY FINDINGS**

#### **6.1 Introduction**

This chapter presents a discussion on the key findings as expounded in the previous two chapters. For the purpose of this discussion, the same themes used in the previous sections will be used to illustrate the extent of corroboration or refutation of the data findings found in both questionnaire and in-depth interview research methods. In Section 6.2, the richness of the data is further supplemented by other evidence from: conversations with people, an analysis of documentary evidence from the Internet and the press, on-line forum participant opinions and other observational methods of study such as 'unobtrusive observation' during a community-government agency meeting concerning tourism development and planning.

The concluding portion of this chapter is Chapter 6.4 whereby the implication of the research findings presents a need for a model of tourism management for Brunei which must respect its inherent problems and limiting constraints.

#### **6.2 Analysis of Key Findings**

Overall, the researcher felt that there was high congruency between the data obtained from the questionnaire survey and data obtained from interviews. Supplementary evidence also tended to corroborate the findings. The findings indicate that the participants of the study were able to identify the issues relevant to tourism development, planning and management in Brunei. The issues raised and addressed have centred on the same dimensions as previously discussed in Chapter 5. These dimensions are: planning, policy and development issues of tourism in Brunei, the economic role of tourism, community attitudes and community involvement, socio-cultural and political processes and issues in Brunei affecting this industry, tourism-related education, tourism-related employment and issues and environmental issues.

To the western eye, this high degree of mutual agreement is unusual because of the emphasis on the individual. However, in the Bruneian context, this degree of congruency is not only the norm but it is also expected. Being a member of this society, the researcher would have been very surprised if the results did not show high levels of corroboration and congruence in societal thinking regarding such a national campaign. The researcher concludes that this is a typical feature of a highly traditional and cohesive society such as Brunei.

The consensus between the questionnaire respondents and the interview respondents appear to be generally high and very few items appear to be in direct contradiction to each other. It is essential to discuss the corroborated and contradictory findings and elucidate possible explanations for these findings. These will be presented in the following sections.

#### **6.2.1 Planning, Policy and Development Issues of Tourism: Coherent, Comprehensive and Critically Focused Management?**

This study sought to find if tourism planning, development and management are coherent, comprehensive, and critically focused processes. The researcher found conclusively that this fragile and sensitive process is lacking in Brunei. There are simply too many obstacles and challenges in this industry at the present time, which act simultaneously against each other resulting in a worsening of this already ill-managed industry. Many participants are aware of the constraints to developing this industry and have expressed their dissatisfaction of these limiting constraints.

The researcher has found that common practices in national management were prevalent and widely spread in tourism management and development in Brunei. This naturally affects the direction in which this industry is run. The author conclusively found that efficacy and efficiency are glaringly absent or inadequate in tourism management. Efficacy refers to proper consultation and communication, co-ordinated and synchronised departmental and ministerial action to achieving national goals. Dimensions of effectiveness refers to the

degree of consultation and coordination with other government ministries, degree of representation in policy-making committees of stakeholders, adequacy and reliability of information and its dissemination to the targeted audience, and extent of analysis of policy consequences in terms of its suitability, acceptability and feasibility.

There is a lack of fair and proper representation by the stakeholders in tourism management, development and planning. Even amongst the stakeholders who are represented in this equation, there is very little consultation carried out amongst themselves. With regards to the representation of selected stakeholders at high or middle levels is also limited. The interest groups that are actually called to become involved may not have the necessary skills or knowledge of tourism development. Furthermore, the roles that they have to play may not be clear to them in both short and long term because they do not understand the tourism vision of the nation.

More worrying to the researcher is the complete lack of tourists' input in the development, planning and management processes of this industry. Tourists as a valid stakeholder grouping were not consulted in development of the Masterplan nor did the researcher's own search for explicit and implicit stakeholders yield any references to this particular group. This is a very important point, which must be considered. When an industry is geared to providing good service and good experiences to its targeted market namely the tourists, then surely, there must be more effort put into formalising their involvement in tourism development initiatives. Tourism development should satisfy both parties: the host nation and the tourists themselves. More importantly, it should satisfy the former.

The researcher was not able to find any examples of tourists' involvement and consultation on a nation-wide level apart from the cursory 'recommendations and customer feedback' questionnaires produced by hotels for their own use. This data is not supplied to any other agencies such as the marketing group in charge of promoting Brunei or to the national tourism planners. There is no

formal forum for tourists to express their opinions that may be valuable in shaping this industry and providing greater service to the target markets.

The study conclusively shows that there is a lack of concerted and co-ordinated response to building this industry between the relevant ministries, the private sector and the community. Many interviewees emphasised the need to create greater links with the government bodies involved in tourism. It is not clear why the relevant ministries are unsupportive of this industry. Perhaps the question of the ownership of a good plan is disputed. As reiterated by HM the Sultan, tourism development is a national vision thus there must be synergy between the relevant parties to ensure that this mission is achieved in a timely manner. However, in their interest of potential disbenefits of tourism spreading to Brunei, some Ministries appear to be extremely reluctant to assist in its development. The rationale being that the costs of tourism such as alcohol consumption by tourists may spread this habit to the Bruneian Muslims.

It has been claimed that tourism development has been a victim of the 'too little too late' syndrome. This is unfortunately true as proven in the study. In some cases, the lack of preparation prior to VBY 2001 was glaringly obvious in certain tourism spots. For example, it was only in January 2001 that the construction work to upgrade the airport departure lounge was initiated. All upgrades to infrastructure should have been finished by the start of VBY 2001 instead of the opposite.

According to the DEPD (Brunei Economic Bulletin, January 2003), the announcement to implement small scale tourism infrastructural upgrades and renovations on existing infrastructure was announced in October 2000. This was only two months before VBY 2001. There are two stages to this implementation scheme. The first stage involved 25 small scale tourism infrastructural projects which were advertised for tender. A total of 170 tenders were received from 46 different contractors. The awards of the tenders were given and construction began on January 2001. All 25 projects were completed by June 2001. The second phase of this scheme saw the proposal

of 10 projects of which only seven have managed to progress into the second stage of development which is the final stage before they are advertised for tendering. This example clearly shows that there is a very large time delay in which the government can actually plan, coordinate and implement public policies and schemes. This was very ill-timed because Brunei was already half-way through VBY 2001 by the time all the projects were completed.

Brunei's discrete tourism policies have great implications on the sustainability of the industry. However, people do not commonly know the policies for this industry and the policy-making process appears to be shrouded in secrecy. There should be greater transparency in the way this industry is managed and to enforce strict guidelines and mechanisms for monitoring tourism planning and development. There should be clear directives to the implementers who will disseminate the information to a wider audience such as the community or to other government departments. They must interpret the policies or goals correctly to ensure proper dissemination. This means that proper channels of communications are needed as well as good supporting systems that can assist in coordinating and communicating ideas to the target medium.

A central tourism body with adequate executive power to govern, manage and control this industry is also needed to help shape tourism policy planning. However, there is no such body yet established in Brunei. The objective here as observed by a member of the public seems to be 'to implement tourism now regardless if the country is ready or not and think of the consequences later'. This is regrettably what has appeared in the study that tourism developers and planners have not been afforded enough time to mull over the implications of this industry and to analyse its feasibility in a cash-strapped country needing a quick fix to its economic situation.

As mentioned by a tourism practitioner, the lack of clear tourism policies and directives have produced many grey areas that are naturally prone to mismanagement. The researcher construes that very little research was conducted to address the problems and issues pertaining to tourism in Brunei before those responsible for tourism development finalised their decisions. As

presumed by the researcher, the data have indeed shown that there is very minimal community involvement in tourism. The researcher concludes that the cause and effect of government policies is widely ignored which leads to many more problems. It appears that the lack of time in which to strategically prepare for tourism implementation is a strong cause for inefficient and ineffective tourism planning, development and management.

Reliable statistics on tourism development, planning and management are also very scarce. These are needed to ensure that the national goals on tourism are being realised and at what costs. There is no proper marketing and competitor analysis undertaken even though there is awareness that this is a crucial step to achieving success. With regards to the marketing of Brunei, a member of the public commented that: 'it is high time tourism officials stop go gallivanting without apparently having a fixed agenda. Rather he suggested that 'The money will be better spent if the key catalysts in this game, who are foreign travel writers and wholesale and retail agents and airline representatives are brought here to show what Brunei has to offer'.

In the Bruneian context, it was thus revealed that the challenge of effective marketing is also a huge problem to the small businesses in this industry. Indeed, there is a huge global market that may be tapped but the costs appear to be too high for most businesses here. The scope for exploitation by the computer management service providers over the tourism-related businesses in this matter is also a relevant worry.

The use of the internet as an effective marketing tool was also broached by other observers. One travel agent mentioned that the problem with upgrading their systems to enable on-line purchasing and interactive websites was in the cost of its maintenance, the technological expertise necessary to set up the websites, and the security of ensuring safe on-line purchasing facilities and transactions. The travel agency which he worked for in a better financial position than the others hence they have been actively advertising themselves through the electronic medium. A major setback was the fact that the

computer management services company, which they have recruited to design the marketing software package for them wanted to continue its maintenance and future upgrades as well processing their on-line orders. This condition was not acceptable to them because of the security involved in keeping company financial records private, safe and secure.

As mentioned earlier, Brunei was also marketed together with Sabah and Sarawak as an exciting Borneo package. It was hoped that this symbiotic relationship would help increase visitor arrivals into the region as a whole. The idea was that Brunei would not compete with these two eastern Malaysian states but it would be offered as a complementary package. This strategy aimed to create a symbiotic and mutually beneficial relationship so that all parties benefit. However, it was alleged by both the media and the travel agents that Sabah and Sarawak tour agencies were actively persuading its customers to bypass Brunei because it was 'boring' and lacked tourism interest. This is an example that confirmed public and interviewee belief that the tourism in Brunei cannot survive without external reinforcement from these two Malaysian states. The problem is in achieving their belief and trust in Brunei.

The researcher was fortunate to be able to attend the annual international trade exhibition, the World Travel Market (WTM) in London in 1999. This was the first time that the BTDU had organised the Bruneian contingent on its own. In previous years, the Bruneian delegation was organised by the RBA. During these years, the travel agent representatives, hoteliers and tourism authority were invited to join in as part of their marketing exercise.

This was the launch of the Bruneian slogan 'A Kingdom of Unexpected Treasures'. The researcher felt that the inexperience and lack of pro-activity of the officers in marketing activities was evident. Perhaps in order to create a more forceful first impression, the Bruneian delegation could have presented themselves in cultural or national costume dressage to invite potential buyers into the exhibition booth.



Tourism is a tough industry whereby it is necessary to use hard selling tactics to gain the precious tourism dollars. International travel exhibitions are events that pit one destination against another and where customers have a dazzling array of tourism products to choose. Thus it is essential for any tourism representative to pursue an aggressive selling and marketing strategy to entice custom.

In relation to this, the researcher observed a lack of aggressive marketing by the participants. Other delegations were more pro-active in getting the customers to enter their exhibition booths whereas the Bruneian travel representatives appeared to wait for customers to come to them. The researcher feels that cultural traits impart a role on this issue. Bruneians are naturally 'pemalu' meaning reserved. This socio-cultural trait may be a factor that has lead to this typically 'soft-sell' attitude towards selling their tourism products. The researcher strongly suggests that these participating officers attend marketing or presentation skills workshops to ensure that they can create a more impressive. They should improve their marketing skills and be more aggressive in their selling tactics.

The researcher also noted from her own observations and comments from the travel representatives that there were few discussions about the order or structure of proceedings in which travel events are organised. For example, the press interview session. In a presentation event, there are operational and logistical issues that must be addressed to ensure its smooth running. There are people whose job is to man the floor, serve the drinks, guide the guests to their reserved seats and so forth. In this instance, the researcher felt that there was no obvious job delegation amongst the participants when it came to the press interview session on Brunei tourism. The researcher observed that rather than building a support system harnessing the energies of the attendees and to work together as a team, members of the business representatives were generally not asked to play a role in such events. Rather the whole operation was orchestrated by the BTDU.

This was telling in the sense that the researcher felt that there was a lack of team-work and team spirit amongst the delegation. The researcher strongly feels that if more effort was applied in bridging this gap in communication, the delegates could have formed a better and more organised crew that would enhance the interview session itself. The point that the researcher feels is relevant in this instance is that more interactivity is needed amongst the delegation members that will help to communicate goals and objectives clearly and also assist in building team work.

In 2001, the researcher first noted a handful of London buses decorated with an advertisement for VBY 2001 at the rear side. Other Asian destinations had their advertisements on the wider sides of these buses. Again, this reflected the lack of funding allowed for tourism marketing by the government.

Since 1998, Brunei tourism has had two different slogans namely 'Emerald of the East' and 'Kingdom of Unexpected Treasures'. The changes in the slogans reflected the changes in marketing strategy. A problem brought on by the changes, which a travel agent representative complained about, was the cost in printing additional material that reflected the current slogan. He complained that it was only after costly mass production of the pamphlets using the slogan 'Emerald of the East', that he was made aware of the change in marketing slogan. This was indicative of the lack of communication between the BTDU and the industry players in relaying changes in marketing strategies to ensure that there was a concerted action in the achievement of national and private objectives. The travel agent also complained that it made his company look outdated because his leaflets were still using the previous slogans.

The issue of on-line marketing was also recently highlighted by the launch of the Jerudong Empire Hotel's website (Borneo Bulletin, May 2003). This super sophisticated website was designed by an international firm which had on-line booking and reservations facilities. There are many web management companies in Brunei that could have been appointed by this hotel but the

choice went to an international firm thus decreasing the multiplier effect to other local firms.

The researcher also considers RBA's entry into on-line marketing in late 2000 as being untimely late. The quality of the website is not as good as that of other airlines. The researcher feels that this should have been launched earlier to ensure that there was greater prolonged coverage of the upcoming VBY 2001 and thus create stronger market coverage of this event.

In a recent newspaper article (Borneo Bulletin, 19<sup>th</sup> May 2003), the lack of marketing success achieved by the Bruneian delegation in the travel and trade exhibitions was highlighted. Here, the BTDU officers were accused of having 'semi-holidays'. However, the researcher notes that in recent months, the BTDU is actively pursuing other markets. Brunei has already changed its strategy as reflected in the choice of international travel exhibitions, which the tourism authorities and travel and tourism representatives attend. For the first time in May 2003, it participated in the leading travel industry event for the Middle East and Pan-Arab world (Borneo Bulletin, 19<sup>th</sup> May 2003)

A young hotelier also considered the environment for nurturing team work, equal participation, reciprocal communication, consensual decision-making and mutual respect was absent in BAH. The hotelier also felt that the monthly meetings were more of a 'high-tea' gathering rather than a formal meeting for discussion on relevant issues. During these meetings, the 'patronising attitudes' held by the older and more senior industry players meant that they were not willing to listen to its younger members. The discovery of this point highlighted that even inter-industry relationships and politics are detrimental to the effective growth of this industry. Tourism strategic management lies on the basic premise of continuous product enhancement and development, which draws upon the creativity, and appreciation of individuals.

This is not the scenario in Brunei. Bruneian society operates a seniority system whereby age is a precursor to leadership. Here seniority still rules. Thus senior leaders are expected to have wisdom over their charges. In many

cases, the suggestions of the younger members are not heeded because they are deemed to be lacking in the wisdom and knowledge that comes with age. The researcher is aware that a socio-cultural norm in Brunei frowns on a younger person directing an older person because it is seen as being disrespectful. Although this is the only verbal comment received in this regard, the researcher suspects that this is not an isolated incident. This may be occurring in other tourism related organisation as well. However, this is outside the sphere of the research but presents great scope for further research.

The problems experienced by the official hotel and travel agent associations in Brunei are also recurrent themes broached throughout the research. The industry voices acknowledge the need for collective representation through BAH and BATA and realise their importance within the industry. These are however, both considered to be ineffective and inefficiently managed organisations. An interviewee remarked that this was simply a gathering of industry representatives who lack collective power to change laws relating to tourism in Brunei. According to another interviewee, their voices are never heard despite voicing out their critical concerns to the BTDU.

With regards to the alcohol issue, many people believed that there were higher hotel occupancy levels when liquor was still permitted. This is however not the case. During the time when legislation was considered still lax on alcohol, the economic environment was more stable. Furthermore, this was the time of the now bankrupt Amadeo Corporation that brought in many foreign businessmen and expatriate workers into the country. However, with the fall of Amadeo and the Asian economic crisis, hotel occupancy rates plummeted.

The national airline is imbued with internal management crises. Since 1995, there have been numerous managerial reshufflings. As a result of unstable internal company environment, it was believed that RBA's management staff were scared to make definitive decisions because they feared being next in the 're-shuffle' line. A national airline without strong leadership for many years

of its operation has lead to very severe company losses. The public does not know the true extent of profit losses but evidence from the constant board re-organisations indicates that the losses are massive.

There were also loud concerns expressed by those in the travel agency industry of RBA's unfair and monopolistic practises. One of RBA's subsidiary companies is a travel agency and there is justifiable concern that RBA has an unfair advantage over its competitors because it has greater access to the international market. They are perceived to be under-cutting the market thus creating a highly competitive market for both inbound and outbound tourism amongst the travel agencies.

Throughout the research study, the researcher came across many frustrated comments amongst the industry players who were trying to implement successful marketing plans for their businesses. To these people, the realisation that Brunei can never be a global player in tourism is real. There is 'no hope for Brunei' to compete against countries such as Thailand, Malaysia and Singapore.

During the SARS epidemic, crisis management of this industry has been ineffective. The tourism related industries have received very little government help in the form of financial aid or assistance unlike in other countries. It was only in May 2003 that the BTDU decided to look into ways of promoting domestic tourism to boost tourism revenue. During the SARs epidemic, an hotelier glumly admitted that all hotel bookings made by its overseas customers have been cancelled. This is because most of the travellers would have to pass through SARS affected countries to get through to Brunei.

Herein lies a window of opportunity for RBA to recapture the travel market. Brunei does not have any SARS cases. It should now be marketed as a safe country where travellers can experience the Southeast Asian hospitality without severe health risks. RBA can market itself at strategic locations to help bring in travellers to the region. Furthermore, tourism representatives from Brunei should be present at major RBA destinations for example London.

In 2002, a Malaysian tourism office was opened to market Malaysia to the Bruneians. This had the full support of the MIPR and BTDU. However, the question remains as to why this action was not reciprocated in a similar manner. Brunei should open up tourism offices in major SEA regions because most of its travellers originate from this area.

Tourism in many countries is a private sector led industry, which is guided by strong non-governmental tourism organisations. In Brunei however, there is a discrepancy between private and public sector thinking on this matter. The government believes that the tourism industry cannot survive without strong governmental support at the present situation. In the long term, this industry will have to be private sector-led. The researcher concurs with this belief but is very sceptical as to its survival in both the short and long run without governmental support.

This assumption is based on the following scenarios in Brunei, which will be described accordingly. The private sector is very weak and will require constant strong support from the government. As highlighted in a recent newspaper article (Borneo Bulletin, October 18<sup>th</sup> 2002), both foreign and local businesses are relocating abroad to more profitable pastures. Brunei is typically suffering from 'malaise' of 'new' independent states. It has a very short history of independent governance from British protectorate in 1984. Therefore it is very natural that its national style of governance will not be as advanced, as that of other more established nations. This inexperience in effective governance has a direct impact on the wealth and health of its private sector economy as over the years. There has been government effort to provide many attractive business incentives to investors such as tax-free profit gains but this has been negated by counter-effective policies, which have been enforced and has helped to create and exacerbate a slow business climate.

These 'business-unfriendly policies' such as long and bureaucratic application approval processes to various departments and limits on foreign labour

quotas have lead to dismal business interest of multinational firms and local firms alike in investing in Brunei. Indeed many actual potential investors have cited red tape, lack of local entrepreneurial spirit and bureaucracy as obstacles in business market attractiveness. This negative image held by the business community is exacerbating the already weak privates sector. A 'catch 22' situation is created because they simply do not have faith in Brunei's economy and their lack of business participation translates into fewer job employment prospects for local Bruneians.

Another factor that has led to a stifled private sector is that previously Brunei's paternalistic government has provided enormous benefits to its government employees. These perks are more attractive than those offered in the private sector. Associated with this is a cultural element, which also imparts a negative impact on the private sector. Asian values include strong family loyalty, which is a cultural norm. This loyalty means that as government employees, the benefits and perks are also given to the children such as free education and effectively free hospital treatment. Hence many people tend to apply for government positions. This effectively decreases the number of participants within the private sector that minimises their bargaining powers to lobby for pro-business government incentives and policies.

Although conclusive research has not been conducted to private sector, on the onset, it appears that the minority Chinese population heavily dominates the business scene with Malays serving as sleeping partners. Certainly, the larger shops in Brunei are owned and run by a handful of Chinese families. An unintended ethnic and racial cleavage has favoured Malay employment in the government sector, which effectively excludes them from the privates sector that serves to disadvantage the Malay community at large. This is also another factor, which limits the private sector.

The problems that have been found relevant to the planning, policy and development issues of tourism in Brunei are wide ranging. They conform to the multitude of problems faced by those at the infancy stages of tourism development. The findings are summarised in the Table 1.

**Table 1. Summary of Data Findings from the Study Incorporating both Qualitative and Quantitative Research Methods**

<b>Planning, policy and development issues of tourism in Brunei: coherent, comprehensive, and critically focused?</b>
<p>Intensely public-sector led and not private-sector driven</p> <p>Very weak private sector</p> <p>Inaccessible Tourism Masterplan- lack of reference</p> <p>Last minute activity</p> <p>Unclear policy/ decision-making process</p> <p>Discrete policies on tourism</p> <p>Under-utilisation of resources</p> <p>Unsustainable</p> <p>Uncoordinated management</p> <p>Lack of communication between BTDU, inter-industry players and community</p> <p>Lack of stakeholder management</p> <p>Inexperienced tourism practitioners at NTO level</p> <p>Civil servants in charge, not industry representative</p> <p>Powerless BAH and BATA</p> <p>No Brunei Tourism Board</p> <p>Under funding</p> <p>Heavy reliance on the District Office to develop tourism</p> <p>Lack of support system for work delegation</p> <p>Top-down management</p> <p>Lack of marketing : to domestic and international tourists, lacklustre success in travel exhibition</p> <p>Lack of research and development</p> <p>Lack of statistical data</p> <p>Inconsistent implementation of tourism management policies</p> <p>Inefficient channels of communication between stakeholders</p> <p>Leadership problems</p> <p>Community at large is not actively involved at decision-making level</p> <p>Ministry of Religious Affairs to increase involvement</p>



### 6.2.2 Economic role of tourism

As indicated by the research findings, most Bruneians understand the potential economic benefits of tourism. As a 'quick fix' option, tourism is being sold to the locals as a necessary means of economic diversification, primarily to generate local employment and gain foreign exchange. Most Bruneians generally accept this rationale as it is seen as the least expensive and most justifiable means of diversification because of the low start up costs involved and the already existing infrastructure.

Despite the acceptance of this rationale, the study has shown that many are concerned that economically, Brunei will not be able to achieve much in the current context. A comment posted by an anonymous commentator on an on-line forum called 'Hear Your Say' on the nationally endorsed Brudirect website, the electronic version of the national newspaper Borneo Bulletin, woefully declared in 2001 that with regards to tourism development 'we have gone from not being much at all to trying to become global masters at anything and everything it seems. Our time and money should be on developing those industries, which don't involve negative aspects and not on things which we know we cannot pull off.'

The researcher found that many participants perceive that there are some tourism activities, which have been limited without consideration of prevalent market and monetary forces because of the lack of statistics on this industry. Some have questioned if this industry truly justifies the financial costs poured into it or the overall effort put into it in human resource terms. The human resources come from the locals for whom the benefits of tourism should affect.

In January 2001, the Working Capital Credit Fund Scheme was launched as part of a short term recovery package as strongly endorsed by the Brunei Darussalam Economic Council (BDEC). Here a budget of BND 20.0 million was earmarked for Phase 1 of this Fund Scheme to be made available to local SMEs. By December 2002, only 2 projects out of the 108 loan projects were

tourism-related. The total BND555,000 loan amount for the two tourism-related projects came from non-local Islamic banks.

The researcher proposes that all tourism-related projects be financed from local Islamic banks in Brunei such as the International Development Bank of Brunei (IDBB), the Islamic Bank of Brunei (IBB) or Tabung Amanah Islam Brunei (TAIB). This arises from the need to promote local banks in Brunei and also to promote investors to conduct business using Islamic banking and finance which prohibits usury or interest. In this way, the researcher believes that the tourism-related activity will be 'halal' provided it does not go against any religious principles.

Tourists / visitors are more likely to go on package tours which are very seasonal thus there will be limited contact with the local community. Brunei is being packaged as a short excursion (2-3 days) and is often packaged together with visits to Sabah and Sarawak under a Borneo tour package. As noted earlier, the attitudes of tour operators in these countries are undermining the success of tourism in Brunei because they do not recommend their tourists to go to Brunei and have literally 'bad-mouthed' Brunei. (Borneo Bulletin, July 2001). This makes the Bruneian product appear of little value and importance.

One plausible explanation is that the value of the Borneo package is diminished due to perceived low quality tourism attractiveness of the Brunei product. This in turn will lead to fewer customer recommendations to purchase the Borneo package thereby jeopardising tourism income in both Sabah and Sarawak. Another possible explanation is that these two Malaysian states view Brunei as unnecessary competitor and would like to eliminate this stiff rivalry. The effect that this has on Brunei is that much of the potential tourism revenue is shifted away to other desirable destinations.

The package itself was not beneficial for the local community in Brunei because of the limited time the tourists were able to spend in Brunei. This means that the brief time in Brunei meant fewer chances for the tourists to

make tourism purchases such as souvenirs, fees to tourist attractions and so forth. Hence the potential for tourism dollars receipt from these Borneo travellers is kept low. Furthermore, the choice of tourism places, which are on offer on this package, does not allow for meaningful cultural exchange between the local Bruneians and the foreigners. Hence the potential multiplier effects in terms of social exchange and economic rewards are low. The action of these foreign tour operators are seen as 'back-stabbing' and does not create for a meaningful and beneficial relationship for those involved.

An underlying reason, which is not popularised, is that Brunei had to do something that was non-gas or oil related because of a vast misappropriation of government funds in the 1990s. This meant that the government had to do something drastic and fast. Tourism is considered by far the easiest option. To some foreigners, however, this is not a necessary option for Brunei. As evidenced by a comment made by a foreign tourism national tourism officer, she admitted that many 'do not really understand why Brunei is developing tourism because it has other means of revenue' and that Bruneian tourism faces very stiff competition from its other ASEAN counterparts who have to be very aggressive in promoting tourism because they truly have no other option unlike Brunei.

Her comment highlighted the following to the researcher: the first, tourism is seen as a last resort by some countries that are not as well endowed with natural resources as Brunei. Singapore for instance is severely limited by its lack of natural resources such as land, water and its dense population. The Singapore government's move to capitalise on its population and entertainment has reaped massive rewards. It is the highest grossing tourism destination in the ASEAN region because it offers a wide range of tourism products from cultural, shopping, conference tourism and so forth. They also offer excellent tourism facilities, attractions, and transportation and services, which altogether forms a well-oiled tourism chain specifically catered for the discerning tourist.

The second point is that even Brunei's own counterparts are more realistic in their expectations for Bruneian tourism to succeed. This is because it will have the problems linked to immaturity, which is made worse by stiff competition from other better developed host destinations such as Thailand and Malaysia, countries offering eco-tourism and cultural tourism. In this respect, the economic rationale for developing tourism in Brunei is not truly justified because of the immense economic problems it will incur in the development process of this industry.

The findings have shown conclusively that there is public scepticism related to the development of this country. In Brunei, the researcher believes that despite the lack of economic success which has been achieved, the industry has a chance to grow provided certain economic changes are made by the government. However, these changes cannot guarantee its success, but only to increase its chance of success because ultimately it will be dependent on tourists' arrivals from both domestic and international segments. A summary of data findings from both research methodologies used is presented in Table 2.

**Table 2. Summary of Data Findings from the Study Incorporating both Qualitative and Quantitative Research Methods**

Economic role of tourism
Necessary soft economic diversification option
Local employment generator
Unrealised income generator
Multiplier effects not filtered throughout the economy or community
Lack of maintenance of tourist places
Lack of tourist attractions
Lack of local produce for tourism consumption
Stiff competition from abroad
Financial leakage
Financial constraints
Fragmented tourism development in districts- spatial economic benefits
Unfavourable business climate
Unfair practices
Promotes national and economic growth
Creates employment and reduces unemployment
Great need to reduce foreign labour participation in this industry
Stimulates the under-developed and uncompetitive private sector
Economically benefits a select few only
Economic gains are small due to seasonal nature of tourism
Widens scope of employment

**6.2.3 Community Participation and Involvement in Tourism**

As mentioned earlier in the literature review, there are six broad strategies that relate to how NGOs support community involvement in tourism. These strategies relate to policies and plans that aim to: provide information and increase awareness in the communities, build adequate capacity and increase confidence amongst the communities, establish effective networks, encouraging responsible tourism practices within the industry, promote and

support responsible tourism behaviour and practices among visitors into the host community; and finally to implement conservation and development plans.

Throughout the fieldwork, the researcher attempted to seek examples of good practices, which illustrate that there are some forms of community based tourism participation and involvement in Brunei. The researcher was able to find very few examples and this was shown in the data findings that conclusively proved that community based tourism participation and involvement is unfortunately wanting in Bruneian context. It remains a rhetoric and political agenda used by the government used as a publicity tool to gain more co-operation and perhaps even acceptance from the community. The researcher feels that Brunei has a very long way to go before it can claim to be a host destination, which is truly responsive to community needs and wants.

As illustrated by the data findings, the community does support the industry as a matter of national pride. The researcher feels that that this support is important but the willingness to participate is not very high. The support is there because it is national duty to support government initiative. The willingness to become involved in this industry filters down to national attitudes towards this industry.

The researcher is left with a strong feeling at the end of the study that the majority of the respondents, especially from the community have a negative attitude towards this industry. Some do feel that this is simply another new 'fangled' activity being implemented because amongst the ASEAN countries Brunei is one of the very few who have yet to endorse and exploit this industry. As this is seen as a last minute activity, many believed that this would bring in more problems because the proper infrastructure is not pro-tourism. The end result would be unachievable and impractical. The present context of Brunei means that it is already set up to struggle and perhaps fail in the long run.

The members of the community are also wary of the 'carrot at the end of a stick' approach to selling tourism to the general public. It was found that the necessary tourism awareness and education schemes are inadequate and should have been implemented sooner rather than mainly in the year 2000.

Brunei should take heed of good practices of community-tourism development from other ASEAN nations such as Thailand. As remarked by a senior tourism adviser from Thailand:

In Thailand, we do seek community involvement at all levels. We conduct feasibility studies and we work closely with the Masterplan. We conduct community education courses by showing a promotional video to students. We also conduct workshops for community leaders to show them the benefits of tourism.

Thus the word of advice should be actively considered: utilise the Masterplan, promote community awareness and seek mutual communication and involvement at grass roots level. Brunei is a small country with a peaceful collectivistic society; one can assume that to elicit community involvement in order to promote empowerment should be less problematic than implementing such policies within a region such as Malaysia with its high population density and varied ethnicities.

However, despite the efforts to enhance tourism community awareness, the Thai senior tourism adviser admits to experiencing problems in promoting community involvement in tourism locally. Some Thai communities have expressed hostility towards tourism development 'as they have seen the socio-cultural impact in their society'. Simultaneous to the increase in quality of life experienced by these communities is a rise in price of local commodities.

The community does not trust the government to realise fully its promises to the community in generating jobs, improve its quality of life and in creating sustainability. The quality of life is not restricted to socio-economic definitions

rather it is much broader. Quality of life as a measurement spectrum has various dimensions which encompass: social opportunity, personal health, personal development in time and leisure, purchasing power of goods and services, quality of working life, personal safety and justice and finally, the physical environment. The community feels that deliverance of such a promise is slim or limited to a select few 'fat cat' elites. There is also concern that the multiplier effects will not be filtered throughout the community because the industry and the private sector tends to prefer out-sourcing rather than using local goods, products and services in this industry. The data shows that one main concern held by the community is the scope for exploitation by those in the travel industry. There is apprehension that the financial gains, which may be accrued, would only benefit the privileged class. The community may be excluded from this potential 'windfall'.

Indeed, the industry seems to be controlled by an elite class with ready access to finance and the related knowledge to exploit this industry such as technical knowledge, marketing skills, human resources and so forth. They appear to be apprehensive about the extent to which they are able to or are willing to accept the community's involvement in tourism development and planning. The travel agents for example are more motivated by profit margins whereas the community is more motivated by eagerness to have a say in the direction of growth and hence achieve tourism empowerment and also to gain a better quality of life.

This is made difficult because the struggle to achieve tourism empowerment requires strong visible and enthusiastic leadership at community level. For some areas, this is absent because of leadership inexperience, inertia or simple lack of participation in this industry. In these cases, not much can be done at community wide level.

The researcher found that the community's hierarchical strata are very male-oriented. At a meeting conducted by the Head of District Office and the village leaders and elders, the researcher was amongst one out of three women in attendance. The researcher was informed that numbers of female participants



in community tourism development are very minimal and if at all present, their roles appeared to be limited to junior levels. For example, they do not appear to be involved at decision-making level. This may be explained by the fact that women in Brunei Malay society reach a glass ceiling in both the private and public sectors very quickly. The researcher is not aware of any women elected as Ketua Kampung or as Penghulu. It was found that the roles of women in village or community life are limited to non-decision making roles (such as Treasurer, Secretary). It is beyond the scope of this study to analyse if gender has an impact on the direction of tourism planning, management and development but the researcher strongly suspects that it might have an impact on this industry if female participation were accepted, increased and acknowledged.

The researcher realises that the community as a whole is disadvantaged right from the start. They have limited access to everything that is needed for tourism development and management such as strong guidance, finance, skills, training, education, marketing savvy and so forth. The researcher believed that current community development has to be re-structured differently. The way forward to community empowerment and ownership is through establishing partnerships or joint ventures with other tourism developers (e.g. travel agents, hoteliers).

The communities in Brunei, especially the indigenous groups are restricted from full involvement and benefit from this industry because of various reasons such as: financial access, marketing know-how and direct access to the tourists' market. By establishing joint ventures or partnerships, the benefits of economies of scale are afforded to the community. The minority group i.e. the communities then can cash in on their business expertise, financial resources, tourism knowledge and so forth.

Financial remuneration is another issue that has to be addressed. Traditional cultures are priceless commodities but the problems arise when it becomes a product for sale and a showcase. The question is can or should market forces, especially global western forces put a financial value to experience the

culture? The public feels that it is up to the BTDU to set the prices but the BTDU has emphasised that it is up to the communities to charge fair prices for the services which they provide e.g. cultural shows, photographic opportunities with traditionally dressed tribesmen and so forth. Naturally, there are problems related to the latter. The prices may be fixed by somebody who has very little knowledge of costing principles and this may lead to underpricing of cultural commodities. The communities wanted 'fair financial returns' for their hospitality but this is a subjective concept and it will differ between each individual. This may lead to conflict amongst community members.

There was very little dissemination of information given to communities which would have been fruitful in helping to decide the tourism options on which to embark upon. Communities were not presented with options to set up small-scale ventures to compete for business nor were they presented with the choice of working or collaborating with the private sector i.e. industry players.

The researcher draws on an example of the beneficial and fruitful partnership created between the locals and a major industry player in Malaysia. The trishaw operators of Malacca in Malaysia are sponsored to provide a city tour for the guests of an international hotel every weekend.

Another good practice that the hotels can adopt that has created a strong linkage between industry players in Malacca may also be adopted in Brunei. Every Saturday, a prominent hotel in Malacca offers a complimentary city ride on the city's trishaws. At the appointed time, all of the city's trishaw operators congregate at the hotel and offer their services, which are paid for by the hotel, regardless of the number of hotel patrons. The trishaws themselves becomes a tourist attraction as they cycle thorough the city in a long colourful impressive chain. The trishaw operators themselves act as tour guides of this city.

This action actively seeks out the cooperation of the rickshaw operators by the hotel, realises the multiplier effect and leads to a mutually beneficial relationship between the parties involved. It also helps to create a pleasant

and non-conflicting atmosphere between the hotel and trishaw operators. Brunei does not have a trishaw system but it does have 'tamuai' (boats) which can give tourists a ride around Brunei's historic Water village.

However, on the flip side, the researcher is aware that there may be resulting conflict in communities with various indigenous groups in it such as Temburong. The potential for making money may be exploited by one indigenous group in particular leaving the other groups disadvantaged in terms of development. The quality of life of the more developed community will be higher and better. This may also accelerate the rate of societal and communal decay in that indigenous grouping as contacts with tourist change their way of life and means of traditional living. This relates to changes in socio-cultural values which will be discussed in the next section.

Overall, the study shows conclusively the numerous problems illustrated in Table 3 that have led to low community confidence and involvement in the industry. Thus radical changes must be made to induce higher levels of ownership, empowerment and belief in this industry and this must be conducted by both government and industry representatives.

**Table 3. Summary of Data Findings from the Study Incorporating both Qualitative and Quantitative Research Methods**

<b>Community attitudes and community involvement</b>
Tourism development is a source of national pride
Inadequate level of education given
Low awareness
Low tourism entrepreneurial skills
Low marketing skills
Tourism should be governed by strong morals and ethics
Lack of youth participation- old age pensioner activity
Not truly prepared for VBY
Problems encountered in effort to increase community involvement
Sense of disempowerment is frequent
Poor communication channels
Little mutual consultation and communication
Leadership, expertise and experience problems at top level
Interface problems
Male dominated/managed sphere
Low involvement/ lacklustre community participation
Scope for uneven community development leading to conflict amongst ethnic groups
Small multiplier effect due to low relationships between industry and community
Lack of faith
Struggle for power for legitimate action in tourism development
Elite-dominated development
Budgetary constraints

#### **6.2.4 Socio-cultural and political processes and issues in Brunei affecting this industry**

The researcher feels that Bruneian society is a vulnerable traditional society and is susceptible to change due to the impact of tourism in terms of its values, culture and norms. Although it appears that the community and participants are aware of the disruptive influences of the effects of tourism, the researcher believes that the Bruneian community believes that the effect will be minimal. The researcher believes that this is debatable. A summary of the findings is provided in Table 4.

'Cultural deterioration', cultural corrosion and the commoditisation of culture are likely to happen. The researcher came across an example of deliberate cultural change of indigenous tradition as shown in the previous chapter. According to the interviewee, there appears to be a deliberate effort by the cultural authorities to change the authentic culture, local values, belief and practices of indigenous tribes to become more Islamic as these practices were held to be paganistic or animistic. However, the tribe leaders are making a stand in preserving their culture for themselves. There is a defiant pride and interest in local ethnic communities in preserving their true culture. The researcher feels that if the current coercion to change continues the above dilution, debasement, corruption, compromise of culture will occur faster not only because of governmental pressure but also due the promise of cold hard cash through its mass production and presentation on the stage for the cultural tourists.

The official endorsement for tourism development is to promote national awareness and pride in Brunei's heritage. It is perhaps a deliberate exercise to enhance one's national consciousness. There is evidence that this has occurred because of the comments made by some respondents who state that 'Brunei yakin' (Brunei is confident) or 'Brunei boleh' ('Brunei can do it'). If we have managed to successfully hold the SEA Games in 1999 and APEC 2000, then Brunei can hold its own as a desirable tourist destination.

The researcher also acknowledges that the perceived culture clash with tourists going to Brunei may not even occur if the tourists came from a similar culture such as Malaysia. Certainly the culture clash will not happen if the tourists came from within the country. It is very likely that any form of cultural exchange, either positive or negative, will mainly occur when the tourists are westerners.

The author finds it intriguing that the concept of MIB is not clear in the minds of interviewees despite its acceptance as a national guideline in Bruneian society and lifestyle. This may be because this concept has not been fully explained in concrete terms to the general public. It is a very subjective concept and thus has an impact on how people see its effect on tourism.

Most participants allude to its relevance in this industry as a tool to negate or minimise the potential bad side effects of tourism development in Brunei. There is some contention amongst some participants who are split between the need to implement tourism within MIB guidelines or to reach an acceptable trade-off between MIB and the needs and wants of tourists which Islamically are regarded as 'forbidden' or 'unlawful'. These forbidden or 'unlawful' activities and tourism consumables include entertainment, discos, free social mixing, alcohol and so forth.

The researcher personally feels that the tenets of MIB are certainly applicable to Brunei's tourism. There must be control over this industry and as the government as a guideline to governance has already used MIB; the researcher feels that it can also be extended to tourism. Under the Islamic ethos, various actions which constitute as sustainable, community-based and responsible tourism practices are applicable and encouraged such as environmental protection, prevention of excessive waste, creating open channels of communication and consensus decision making. Many argue that Islamic principles limit tourism because it forbids alcohol. A counter-argument is that the peaceful and responsible tourist is more likely to create better tourism through socially responsible behaviour, which is achieved through banning intoxicants such as alcohol. The researcher believes that by abiding

by the MIB principles, the tourism practitioners will know what is right and wrong thus in tourism, moral and ethical behaviour is kept in check.

The researcher strongly feels that the 'unlawful' tourism consumables should not be provided by Muslim owned tourism service providers such as hotels or restaurants but may be provided by non-Muslim proprietors. These consumables should also not be accessible to Muslims but legally permitted for non-locals or foreign non-Muslim tourists.

The Brunei government only recently banned alcohol in 1991. As a concession to non-Muslims, it allows the importation of restricted amounts of liquor into the country, which must be declared at immigration points. The maximum is a dozen cans of beer and two bottles of spirits or wine. Public consumption of these drinks is also controlled. For example, non-Muslims can consume liquor with their meals on a 'BYO' ('bring your own') basis at an international hotel provided they do not dine inside the main dining area but this is restricted to those who dine al fresco by the pool.

In societal and cultural terms, some undesirable changes have already been seen. Negative behavioural patterns amongst some locals brought on by increased tourist presence in Brunei are already occurring in Brunei. The researcher draws on the experiences of female tourists who felt that their holiday in Brunei was marred by the unwanted attention that they received from Bruneian men whilst on holiday in Brunei ([http://www.brudirect.com/DailyInfo/advertise/have\\_your\\_say/brunei.htm](http://www.brudirect.com/DailyInfo/advertise/have_your_say/brunei.htm)).

Western tourists are seen as 'novelties' in Brunei because previously, their numbers have been low. The current tourism drive has encouraged others to visit this country, and with that, the natural curiosities of its locals are piqued.

The typical Bruneian woman dresses conservatively and this is a vast difference to western attire. Although tourists are requested to dress conservatively in Brunei, it does not mean that they are not subject to local 'gazing'. It is ironic that the tourists who comes to Brunei to gaze on the 'cultural other' are being treated as the objects of interest as well. This

incident has had a very negative outcome on Brunei tourism because it means that there will not be any repeat visits to the country by the visitors nor have they passed on good 'word of mouth' recommendation to other tourists.

The researcher draws upon the observations made by a Malaysian in a casual conversation on tourism. Her reflections on the direction of tourism development in Malaysia was tinged with regret and shame because of the loss of cultural identity experienced by those who are in direct contact with the foreign tourists, for example the local Malays on the most southern island of Tioman. The Malays here were 'more western than westerners in their mannerism, attitudes, conduct and beliefs'. She noted with regret the islanders' lax morals on matters such as modesty, wealth and alcohol.

She was concerned that so much cultural degradation has occurred within a short space of time since Malaysia first hosted its highly successful Visit Malaysia Year in 1991. This was a heavy price to pay for tourism dollars and she wished that the Malaysian government was as Islamically oriented as the Brunei government. This was 'a failure of the Malaysian government to safeguard the culture, morals and integrity' of the Muslim Malay population in Malaysia.

The researcher feels that the Brunei government can learn from these lessons to ensure minimum cultural dilution of the local Bruneian. The Islamic states of Trengganu and Kelantan have been very successful at their tourism brand and products, which they offer with a Muslim theme. For example, the hotels do not serve alcohol, the lounge music are of melodic Quran recitals or 'nasyid' (religious songs), the international and local cuisine is all 'halal' (permissible) and the facilities such as swimming pools can accommodate the family unit or have different times for usage by either male or female patrons. This is to ensure that there is no free mixing between both genders. Muslim couples are also asked to carry their marriage certificates to ensure that they can lawfully share an accommodation together.



Ethnic tourism is another form of tourism that is based on presenting an ethnic group's traditions and cultures to the outsiders. As indicated by Smith (1989), the young generation take pride in activities, which celebrate their ethnic community's traditions, commemorate their national identity and culture and increase their sense of belonging within that particular community. In this way, the celebration keeps the traditions from dying out with the older generation and is maintained for future generations. The researcher believes that the younger Bruneian Malay generation have less interest in practising their cultural values and are losing their Malay identity. The researcher believes that the ethnic tourism market should be expanded in Brunei because of the positive outcomes it has on reviving ethnic cultural values and practices amongst the youth population.

The threats of external negative impacts from world events have affected this industry in many countries. Brunei is not exempt from this threat. Recent unfortunate events such as the threat of terrorism has dramatically decreased the level of tourism activities as tourists fear to travel to countries considered at risk. Brunei has recently been declared a high risk destination by the Australian authorities after the Bali bombing which occurred in October 2002. This has effectively tarnished the image that is being sold to tourists of Brunei as a safe and peaceful country for vacationers. This 'high-risk' label is baseless, as Brunei has been extremely vigilant with regard to deviant Islamic teachings and fundamentalists.

A political issue is safety in international travel. Before global events, which have impacted on the tourism and travel industry, it was accepted that the locals could bank on the image that Brunei is 'safe'. After all its name means 'Abode of Peace' but the recent global terror attacks have placed Brunei in the minds of tourists as an 'unsafe' place to visit purely because it is an Islamic country. For example, the Australian government has short listed Brunei as an insecure destination after the Bali bombing in late 2002, which effectively killed its inbound tourism from the Australian sector.

These events are not within Bruneian control and the only strategic thing, which can be done, is to carry out quick and effective 'crisis' management. However, this is something of which the inexperienced tourism developers of the country have only minimal experience, and one which will be needed in future should further global events impact on this fledgling industry.

The tourism product offered in Brunei is cultural and ecotourism. The researcher was also interested to see if the marketing of these products were compliant with cultural norms and MIB principles and were consistent with illustrating the types of tourism activities offered. The researcher concluded that there was little evidence that the images produced illustrated any visual stereotypical sexual or ethnic connotations which may be perpetuated within tourism marketing and advertising activities. Certainly, there was very little evidence of portrayals of men and women in the advertising. Rather this was limited to picturesque scenes showing the tranquillity of Brunei and also happy scenes of Bruneian children in traditional garments.

**Table 4. Summary of Data Findings from the Study Incorporating both Qualitative and Quantitative Research Methods**

<b>Socio-cultural and political processes and issues</b>
Source of national pride
Protection of cultural elements important
National philosophy (MIB) as a tool and obstacle to this industry
Involvement of the Ministry of Religious Affairs is needed
Islamic based tourism to be encouraged
Selective host destination: specific tourists wanted
Stable political environment is safe and attractive for family holidays
cultural commoditisation is acceptable
May affect and compromise MIB principles in practice
May contribute to the quality of life in Brunei
May increase undesirable and immoral behaviour through exposure by foreigners
Change in culture and values
Halal issue is important to safeguard culture
Sense of Tawakkal is apparent amongst Muslims

### **6.2.5 Tourism-Related Education**

The data found that most participants believe that there is a severe lack of tourism and hospitality training institutions in Brunei (Table 5). There are very few properly qualified academic and tourism educators in Brunei. There is also concern that there are few places which can offer practical industry training to those who are keen to work in this industry.

However, in early 2001, a move, which signified betterment in tourism and hospitality apprenticeship training scheme, was made by Sheraton Hotel and the Sultan Saiful Rijal Technical College. This is symbolic of two things: the first is a change in employer attitudes towards hiring locally trained, qualified and skilled Bruneians. The second signifies a change in local attitude towards working in this industry. According to the Commissioner of Labour, the hospitality and tourism industry-training scheme has attracted more than 2000 applicants who anticipate working in a future booming tourism industry. Competition for the apprenticeships and work placements is tough because on the job training schemes and sponsorship are limited amongst the hotels that have agreed to participate on these programmes.

That was the scenario in early 2001. As VBY 2001 progressed, it became very clear that it was not going to generate that many jobs because tourists have not come to Brunei in the expected numbers. These changed local attitudes again from being positive to negative within a very short time. The negative perception of locals towards having a career in this industry is made clear in a recent newspaper article (November 2002), which highlighted the complete lack of student intake in Brunei's first tourism training hotel. This serves to illustrate that people post VBY 2001 do not perceive this job sector as a viable means of livelihood.

There is a misconception amongst members of the general public who regard vocational and technical education as being inferior and has a low status. They view this education as being reserved for those who have failed their secondary education and cannot cope with academic subjects. It is not

understood that vocational and technical programmes emphasis heavily on undertaking practical on-the-job training and ‘hands on’ activities that are industry-focussed for employment purposes.

The researcher strongly suggest that the tourism and hospitality trainers and educators be involved and consulted because they are responsible for producing the right calibre workforce to service this industry and thus prevent an over-reliance of imported human resources.

**Table 5. Summary of Data Findings from the Study Incorporating both Qualitative and Quantitative Research Methods**

<b>Tourism -related education and training</b>
Inadequate levels of provision
Limited decision-making roles of tourism educators and trainers
Education should start at younger age group
Cross cultural miscommunication between foreigners and locals
Lack of pro-activity and empowerment
Negative local attitudes to training and education by industry players
Inadequate tourism education and vocational training
Lack of trained workers
Requires locals with tourism expertise and knowledge

### **6.2.6 Tourism-Related Employment and Issues**

In 2001, the country experienced an unemployment rate of 5.6% which is 8,600 persons (Brunei Economic Bulletin, January 2003). There were high hopes that tourism, which had been forecasted to generate six thousand jobs across the industry, would be filled by the unemployed population. However, as VBY 2001 progressed, it became apparent that the negative perceptions of the community as a whole concerning the labour prospects of this industry would be true. The public views on this issue are summarised in Table 6.

There are many postulations concerning the causes of unemployment in Brunei. The first hypothesis is that the private sector does not view the locals as being appropriately skilled or having the proper attitudes to working in the private sector. This has been proven in the research. Some commentators perceive the locals as being choosy and that their non-committal attitudes to work were unfavourable and unconstructive within the private sector. Locals do perceive working in this sector as being a temporary side job until they gain employment within the government which offers greater welfare benefits than the private sector. The private sector also perceives foreign workers to be more productive and cheaper labour than locals.

The data suggest that the community perceive this industry as a low-income industry, which will provide seasonal work. It is also one, which has undesirable work conditions such as late hours, which for some is inappropriate especially for the female workers. The industry still has to rely on a massive foreign labour workforce to service this sector because the locals are still under-trained and under-qualified. This scenario is however changing as many more students of hospitality and tourism are entering these programmes in the hope of a viable career. The immaturity of this industry also made it unlikely to be able to generate and fill six thousand jobs in tourism and tourism related industries (e.g. cottage industries).

Women are traditionally seen as exploited human resources in tourism. In Brunei's case, the researcher was able to find several positive practices that

have benefited women. Women run many of Brunei's soft and cottage industries because such industries are easy to set up within the home situation. These cottage industry operators have greater choice in selling their wares to whomever they wish. Hand crafted souvenirs such as 'kain jongsarat' (hand woven cloth with gold-thread) are sold directly from these companies to the hotels. The company itself, not the hotel buyers, fixes the prices. In this way, there is little exploitation by the purchaser over its supplier. Other handcrafted delicacies also fall into this category such as home-made prawn crackers.

However, on the flip side, with regard to the traditional art of producing 'kain jongsarat', the artisans have to be trained for years in this art form before they can set up their own companies. There are limited local Bruneians interested in this art form and they usually demand higher wages and commission rates for its production. This still creates an employment gap which must be filled by foreign skilled workers, most of whom originate from Indonesia.

There are various job placement schemes operated by different agencies in Brunei. The Labour Department runs the Apprenticeship scheme, whereas Training in the Hospitality and Tourism Industry has been spearheaded and coordinated by the DEPD. These schemes were introduced to change the mindsets of the youth in Brunei by familiarising them to the internal working life of the private sector whilst upgrading their skills and ability to match industry requirements.

Throughout the research, many have expressed doubts about the sustainability of the industry and have recommended that Brunei embark on alternative means of economic diversification such as establishing an Islamic financial centre, becoming a service hub, developing the fisheries and agriculture industries where the jobs may be generated for the unemployed.

**Table 6. Summary of Data Findings from the Study Incorporating both Qualitative and Quantitative Research Methods**

<b>Tourism-related employment and issues</b>
Low income work
Gender bias
Seasonal work
Short term work
Undesirable work conditions
Low welfare benefits given to locals
Changing local attitudes towards tourism employment: from negative to positive
Foreign labour dependence
Negative attitude of tourism employers of firing locals

**6.2.7 Environmental Issues**

Environmental concerns feature dominantly in the discussion pertaining to interviewee concerns for tourism development in Brunei. Many advocate that Brunei should take heed of the lessons from others who have suffered from tourism development as a host nation. The priority is to ‘maximise the benefits and minimise the disbenefits’. As expressed by a Senior Tourism Adviser from Indonesia:

The problem with Bali is that our island is sinking. There are too many buildings on the island. We are water-logged. The tourists have made it expensive to live in Indonesia for the Balinese people. We have very high costs of living now. The traffic congestion is also awful.

He also stated that in 1995, the Minister of Tourism advised that ‘Indonesia should be brave enough to stop tourism development due to massive problems in Indonesia especially in Bali’. However, due to the haze and

economic problems post 1997, the number of tourists fell drastically so now the objective is to get the tourists back to Indonesia. The Bali bomb attack on a nightclub in late 2002 has again brought the industry down and is threatening this US\$6 billion per year industry.

His comments are indicative of the environmental challenges and sensitivities of this industry. This is something that is not fully appreciated in the Bruneian context. The researcher believes that the Brunei government should be more active in its environmental protection and improve local environmental awareness to ensure that there is some hope of sustainability for this industry and for future generations. A summary of data findings from the study incorporating both qualitative and quantitative research methods are shown in Table 7.

**Table 7. Summary of Data Findings from the Study Incorporating both Qualitative and Quantitative Research Methods**

Environmental issues
Lack of environmental protection laws and policies
Under-protection of natural resources
Unsustainable
Unwelcome expansion of tourism facilities
Environmental overloading in Bandar-Muara and Temburong
Ill maintained ecological treasures
Focus on responsible tourists and environmentally aware visitors
Minimum environmental side-effects
Inadequate environmental assessment and monitoring



### 6.3 Summary

Various key findings have been illuminated in the course of this data presentation, which provides perspectives into the true nature of tourism planning, development and management in Brunei. It is found that there is overwhelming evidence that tourism practices in Brunei are inefficient and ineffective due to many operational, cultural, ideological problems.

The various shortcomings of tourism development, planning and management in Brunei found include: limited stakeholder management in terms of consultation and participation of a wider membership within and external to the government tourism structure; low community-based representation, inexpert and inadequately knowledgeable tourism planners and developers; insufficient research and development processes due to lack of information gathering; uncoordinated and inconsistent tourism knowledge and awareness processes; little access to financial resources which affects costing and management processes; and, bureaucratic inertia affecting all processes from budgetary approvals, application approvals and communication processes

It was found that the nature of tourism stakeholders in Brunei is restricted to those who have an apparent vested interest in developing a sustainable tourism industry such as hoteliers, travel agents and business people. The study illustrated that community involvement in tourism is very difficult to manage and that the community does not have faith that the government is sensitive to its needs. The study found that uncoordinated and mutually uncommunicative government bodies, departments and private sector groupings all impart a negative effect on the management of this industry. The study gave strong evidence that the Ministry of Religious Affairs has a role to play in tourism which to some is unwelcome or unnecessary as it may enforce more limits on an already constrained tourism environment.

The study has confirmed Scheyvens' conclusion of widespread disempowerment of communities involved in tourism (2002). In Brunei, the

community and industry players mostly experience signs of disempowerment i.e. economic, psychological, social and political disempowerment. The economic disempowerment includes limited opportunities to gain direct financial benefits because the communities do not have the necessary skills to participate. Psychological disempowerment was illustrated through frustration and disillusionment with the lack of success experienced at community level during VBY 2001; whereas, social disempowerment was illustrated through social decay and disharmony as cultural values are changed with increasing foreign contact and conflict arising from jealousy for being relegated to remaining a small town and not benefiting from tourism development (as shown in the Belait example). Political disempowerment occurred whereby the industry representatives and the BTDU fail to involve the Temburong community in tourism decision-making processes that directly impact on their lives. This leaves the community to feel that they have no real say over the activities or the manner in which tourism is developed in their communities.

The research has given evidence that the lack of centralised policy making for tourism has lead to inherent development and co-ordination processes. Policy recommendations made by the various ministries sometimes support the industry but at other times cause conflict with its development such as strict foreign labour quotas. It was also found that those who participate in the tourism steering committees lack the expertise, knowledge, autonomy, finance powers to implement the necessary changes and processes needed in this industry.

If tourism related processes in development, planning and management are to become efficient and effective, the important factors which have so far been constraints in this industry must be addressed, amended, discarded or improved. This requires a more rigorous analysis and revision of Brunei's current contextual situation and to investigate if there are other methods to deal with this challenge that suits Brunei. This is related to the search for an answer, which is ideologically, culturally, morally and ethically appropriate for Brunei.

The researcher concludes that Brunei is indeed a great transit place but what it needs are the longer staying visitors as opposed to transit visitors. The researcher suggests that a market reassessment of the target group be conducted. Perhaps Brunei should introduce Islamic-themed packages to attract Muslim tourists into the country instead of focussing on western tourists. Another option is to introduce more educational or scientific based tourism packages. An interesting option is to market Brunei as a 'dry' tourist destination for alcoholics. The Alcoholic Anonymous association has on average three million members. This is a very big segment that may be exploited.

The researcher wishes to emphasise that she is taking a detached scholastic view of tourism management in Brunei. The researcher feels that it is indeed appropriate that there are certain limitations on tourism in Brunei such as alcohol consumption as of a matter of principle. The Islamic values should not be compromised because of the wishes of a few guests to the country. Market forces always have limitations on any industry especially the fickle tourism industry and tourism firms have always attempted to manage strategically to survive and overcome its limitations. The researcher believes that Brunei can overcome its limitations whilst it holds onto its principles.

The researcher proposes that a locally specific tourism model be developed which is culturally and ideologically dependent. Brunei needs to adopt a model, which the population can instinctively and intuitively relate to, namely Islamic principles. The motive for tourism planning, development and management should also be based on more noble and spiritual ideals namely for success now and in the hereafter. This will be discussed in the next chapter.

Technology will continue to have a great impact on this fledgling industry. As a result of the threat of global terrorism, many travellers have become paranoid about travelling to potentially dangerous countries. Perhaps one day, foreign tourists may gradually become virtual tourists who may prefer to enjoy a safe and enjoyable tourism experience in the comfort of the virtual world. The

technologically savvy tour operator stands to gain by providing this service but the real losers will be the local community in the diminished or even non-existent multiplier effects of tourism. Virtual contact will lead to virtual profits for most.

The female international business traveller is also a segment that the Bruneian tourism industry may cater for. According to industry statistics, the numbers of international female travellers who travel alone or travel in groups have increased. There are already examples of tourism and hospitality-related businesses catering to this rich market. For example, there are some airlines who reserve seats for female travellers for their added comfort and security. The Gallery Hotel in Singapore has floor dedicated for its female patrons which is served by female attendants only. There are international hotels in Saudi Arabia which offer segregated usage of their facilities for their male and female patrons. All of these are designed to capture the female international business traveller.

The actions of the service providers may increase female tourist arrivals but correspondingly, the local population must also be adequately mindful of how to treat female travellers. The actions of the locals in honouring the integrity and sensibilities of the female guests is a huge factor which can either lead to positive or negative impressions of Brunei.

The research findings illustrates that Brunei tourism management and development has its own specific problems which is a direct result of its own inherent characteristics in the political, economic, socio-cultural, technological and environmental dimensions. The uniqueness of its contextual situation requires highly specific and localised solutions which must be found. This will be discussed in the next chapter.

## **CHAPTER 7**

### **THEORETICAL PERSPECTIVE ON TOURISM MODELLING IN BRUNEI**

#### **7.1 Introduction**

This chapter presents the author's theoretical assumptions for the need to view tourism within a specific Bruneian Malay Muslim context. The author discusses the evolution of this ideologically and culturally specific model based on the research findings of the study. This model is not a 'theoretical model' as such but rather of the author's conceptualisation of what is and what should be in Brunei. The following components plays an important role in the advancement of this concept for Brunei: the small size of the sultanate, the predominant Malay Islamic Monarchy (MIB) national philosophy and the relative inexperience and lack of knowledge of Brunei's tourism planners, managers and developers compared to other touristically developed host nations.

This chapter is divided into five sections. Section 7.2 draws attention to the need to develop a perspective on tourism that is easily understood by the people of Brunei. Section 7.3 charts the advancement of this ideologically and culture-specific model in the Bruneian context. It outlines the theoretical underpinnings for tourism conceptual modelling in Brunei which includes the underlying assumptions and values. These include an explanation of how the dominant Islamic faith interlined with cultural traits has influenced the author's deductions on this matter. Section 7.4 discusses the model for Brunei whilst Section 7.5 presents the concluding key highlights of this chapter.

#### **7.2 The Rationale for Tourism Development Modelling in Brunei**

In the course of this study, the researcher was able to observe closely the problems of implementing tourism in Brunei. This industry is sensitive to geo-political issues such as war, the threat of terrorism, regional unrest, the haze effect caused by jungle deforestation through burning and so forth. These geo-political problems are mostly external events, which impact on Bruneian

tourism. These events are beyond Brunei's control, it may however, initiate strategies that will minimise any negative impacts on tourism within the country and on a regional basis. More importantly though are the internal problems of implementation which present even greater challenges to this industry that must be addressed and overcome.

These include as illustrated in the study: segregated tourism development and planning in the four districts; minimum tourism community participation in planning and development; inexperienced and understaffed tourism planners; un-strategic planning which is incoherent, incomprehensive, inflexible and lacks proactivity; the small base of the host nation which restricts tourism development, revenue yield and hence the anticipated multiplier effects into the wider economy; restrictive legislation governing typical tourism consumables such as entertainment and liquor consumption; under-marketing of Brunei as a desirable destination even to the local tourists; limited availability of tourism attractions and venues which themselves are ill-managed and badly-maintained and so forth.

The nature of the host destination determines the nature of the incoming visitor. Brunei is culturally and environmentally rich thus Bruneian tourism caters mainly for two market segments, cultural tourism and eco-tourism. The tourists who are likely to visit Brunei are probably intent on experiencing the 'cultural other' (the cultural tourist) or partaking an ecologically rewarding adventure in Brunei's eco-tourist hotspots (the eco-tourist). Adventure tourism sports tourism and other forms of tourism in Brunei have very limited potential with respect to the current available resources.

In Bruneian context, the researcher believes that the master planning is based on what appears to be a western conceptualisation of this phenomenon. The author draws this assumption based on an analysis of the tourism strategies, which caters towards a mainly western affluent and family-based market segment from Germany, the United States and Australia whose needs are quite specific. These needs include as access to entertainment venues such as night-clubs and liquor consumption. These needs cannot be catered for

easily in Brunei. Either the tourist has to go to neighbouring Malaysian states, Sabah or Sarawak, to enjoy these products, make do without these goods or services or their needs are met by special private arrangement. In many cases, the special needs are accommodated but this sometimes entails going the 'extra mile' in service provision.

The researcher believes in excellent service provision but if the goods and services required do not justify the economic or social cost of delivering the service to the western tourists then it is necessary to reassess the terms and conditions for service and product delivery. It may even be relevant to seek other nationalities that share a similar value system as potential tourists into Brunei as opposed to targeting the present western market. The important requirement is that the law, which is based on specific Brunei Malay Islamic values, is not compromised.

The researcher has deduced that for tourism to succeed in Brunei, tourism practitioners must not blindly follow the proposed western theories and concepts for tourism but must be brave enough to follow their own agenda, to wisely learn from others and to implement their own form of tourism.

In Brunei context, tourism is a newly emerging industry. In promoting the tourism industry, the religious, moral and cultural values of the country will be fully preserved and respected. To support the development of eco-tourism in particular, the over-exploitation of natural resources as well as damage to the environment have to be avoided.

Source: Seventh National Development Plan 1996-2000 (p.71)

In a speech made to mark the 19th National Day of Brunei, the Brunei ruler highlighted that 'the key that ensures the country's competitive edge in the challenging international arena' is to stand in solidarity and patriotism and to rely on Islamic teachings as the main pillar of national harmony and prosperity. This is the way to build a tolerant and respectful nation.

The above statements are symbolic that Brunei has its own specific tourism ideals that emphasise maintenance of religious, moral and cultural grounds. Essentially, the government 's objective is to uphold these dimensions above all. This emphasis on non-monetary issues as made apparent by the absence of reference to profit in tourism development serve as an important basis for constructing an alternative tourism model for Brunei.

The researcher has noted the many painful lessons in tourism development as experienced by other nations. Brunei must learn these lessons well. Many developing countries that have chosen to undergo tourism development have done so in an *laissez faire* manner. This has lead to many problems from all aspects. Economically, for example in Uganda, the anticipated economic gains have not reached the community but gone rather to its fat cat developers. Simultaneously in Uganda, it has led to massive environmental damage that cannot be rectified in the short term.

Socially in Thailand, the tourism sex industry has lead to a tarnished country image and one of the highest mortality rates from sex-related diseases. Culturally in Hawaii, many critics claim that 'cultural dilution' and 'cultural commoditisation' is occurring whereby once sacred ceremonies have been re-designed for public consumption and for a fee. Morally, mass tourism for example, in Spain, has been cited as a prime example for contributing towards moral degradation because it promotes the 'sun, sex and sea' way of life. Ethically, in Las Vegas where gambling tourism is very popular, some may view it an unethical means to gaining one's source of income.

One can easily refer to these examples as good illustrations of the negative aspects of tourism. Tourism in Brunei Darussalam should not and cannot be left unchecked. In the process of this research, the author concluded that despite the best of Government intentions to realise the benefits of tourism, the industry would remain in its fledgling infancy stage if implementation of the Masterplan is not carried out fully or even partially. *Ad hoc* implementation will never lead to community based tourism development nor sustainability for future generations.



Tourism in small Muslim states is under-researched as explored and discussed in the literature review. The best example and perhaps the most obvious example that is similar to Brunei's political, economical and ideological context is Saudi Arabia. This sultanate is the destination for the annual Haj pilgrimage to Mecca and Medina by millions of pilgrims. Pilgrimages are religious forms of tourism and are classified as true forms of tourism as it fulfils the basic motivations for travel namely to foster good relations and to create genuine cultural understanding amongst men. The motivation for travel as a pilgrim performing the Haj is for the sole purpose of worship to God.

Statistics indicate that both the Haj and Umrah (lesser pilgrimage) is now a multi-billion hospitality industry in Saudi Arabia with an estimated pilgrim SR10 billion (US\$2.7billion) spent by pilgrims in last year's Haj alone (Local Chamber of Commerce). These pilgrims comprise of one million internal pilgrims (Saudis and non-Saudis) and one million Muslims from outside the Kingdom. It is also estimated that 40% of the invisible earnings gained in the Kingdom's services and tourism sector is derived from this industry.

These economic revenues and multiplier effects are very attractive for any country and form one of the primary reasons for tourism development by host destinations. The added benefit of these religious forms of tourism is that although the lesser pilgrimages maybe conducted at any time of the year and the Haj is an annual affair, the time spent between host and pilgrim is not socially or morally destabilising because of the common nature of the pilgrims themselves. These multi-cultural pilgrims share the same faith and are aware of the principles of the ideology thus there is already the common goal of worship. The Arab term 'Litarrafu' means 'to get know one another'. The achievement of this reciprocal action amongst pilgrims is easier to experience under this situation as they are bound by the brotherhood or sisterhood of their faith. This spiritual motivator to travel i.e. the need to know the other cultures and races, the creation of good relations and respecting each other regardless of race, colour or ethnicity ultimately leads to the need to fulfil and reach spiritual rejuvenation by seeking God's blessing in the journey.

Each pilgrim has to obey the several basic rules of etiquette whilst performing the Haj. According to Haj laws, one should not disturb the physical environment by doing destructive actions such as killing animals, removing items that constitute a part the physical environment such as stones and so forth. One should also not be wasteful and conserve water where possible. This is important in this desert area where water conservation is important.

One should be considerate towards others and keep the area clean for other users. These laws are important due to the sheer numbers of pilgrims who perform the Haj annually. The carrying capacity of an environment is the acceptable human load, which an environment can sustain at any one time. This carrying capacity must ideally be carefully maintained at all times so that it can readily absorb the numbers who arrive into the area. The massive number of attendees do strain the environment but through actively exercising considerate actions that effectively constitute to sustainable and environmentally friendly practices, the strain on the environment is lessened. The journey is both a spiritual and physical experience. The pilgrim travels to experience in peace the 'brotherhood' and fellowship of their faith, fulfil a duty to God, to appreciate the many cultures in attendance and to respect and protect the natural environment.

These are the socio-cultural and economic benefits which any host destination is eager to produce. However, the Haj as an example of *tourism par excellence* is only limited to the Kingdom of Saudi Arabia. Brunei cannot even attempt to gain similar benefits at the same level because of its tourism product, its small size and relative inexperience in being a host nation. Saudi Arabia has been a destination for pilgrims for hundreds of years thus it has accumulated a wide knowledge base of its hospitality industry. Brunei has no particular religious attraction on par with Saudi Arabia which is the birthplace of Islam and the location of the two Holy cities, Mecca and Medina. Thus it cannot offer the same form of religious tourism as Saudi Arabia. It is however, a small country with a long Islamic history located in Asia with distinctive attractive and appealing characteristics which may be transformed into strategic tourism strengths. It is the lessons, which may be learnt from

analysing the hospitality industry in Saudi Arabia that is relevant to Brunei's context.

The author notes that it is not perhaps for the lack of trying but for the lack of a suitable tourism development model that is applicable to this small Islamic sultanate. Not many small countries have national ideologies such as the MIB concept that exert tremendous effect on national governance and indeed on the direction of tourism development and planning implemented.

Brunei's enduring traditional culture has a very deep impact on tourism management and development. It has to be done in the 'Islamic Bruneian' way where Muslim Bruneian values are prioritised namely (as highlighted in the Seventh National Development Plan) its religious, moral and cultural values. The researcher feels that in line with the 'Islamisation' drive of the Brunei government in all aspects of governance, tourism should also be reconstructed to be in synergy with our values. The focal point is to manage tourism to ensure these benefits are maximised and disbenefits reduced (if not eliminated) in a 'halal', community focused and environmentally friendly way.

The researcher argues that although it is acceptable to apply or adapt existing western capitalistic or socialistic practices, it must only be conducted along the laws of the Islamic religion, either explicit or implicit. These western frameworks to a certain extent may address Bruneian Malay Islamic concerns in tourism before they become inappropriate or inadequate in the longer term.

There have been many attempts by the Brunei government to adopt and implement such tools but success has eluded them. The researcher suspects that it may be because the underlying assumptions on which these capitalistic or socialistic paradigms are not consistent with Bruneian values. Therefore their importance is diminished. The problem is in changing these paradigms to suit a Brunei Malay Islamic framework. For example, Maslow's theory of needs motivation may be applicable to the motivation to travel.

Maslow proposes five levels of needs, which include physiological needs, safety needs, social needs, esteem needs and self-actualisation. In the motivation to travel, people do so in search for fulfilment of the need to get to know other cultures, it is a very social and physical act. However the spiritual element is missing in Maslow's theory. Maslow's dimensions fail to explain this need to travel purely to seek God's blessings as intended by pilgrims. This is an example of how a sound theory fails to explain the spiritual as a motivator to travel.

The researcher strongly believes that tourism must be conducted, developed, implemented and managed within an Islamic framework. This culturally-specific and ideologically-influenced framework is required because research has indicated that despite the much hyped transferability of western tools and techniques of management, these tools really do not suit Brunei's situation. The contextual situation of Brunei demands 'Bruneian' solutions.

The Bruneian model needs to be based on knowledge which the local population already have, either implicitly, intuitively or otherwise. There is a need to realise that tourism is a development process, as any other action, which have repercussions now and in the hereafter. The belief in both the physical and spiritual world cannot be separated in Islam. This is knowledge that has been already instilled in Bruneian Malay Muslims from birth. The model therefore requires clear moral and ethical behaviour systems to ensure the principles are according to sustainable principles.

This model must be applicable to the small size of Brunei. Brunei's finite resources of oil and gas will run out eventually. The other finite resource is its lush green forest, which has been lauded as an environmental gem due to the large flora and fauna thriving in it. This is however susceptible to damage if ill-managed development occurs to ruin the environment. It is also prone to logging activities, which reduces the forest area, and recent climatical hazards such as the haze have endangered its very existence. In addition, Brunei's small under-industrialised base and weak private sector which is prone to financial leakage also requires a model to overcome this issue.

Being a small country, the model will have more of an impact on Bruneian society and population. Its small size can make monitoring and analysis processes easier because of there are less population to cover. A Bruneian model is needed because it will be easier for the population to understand its guiding principles and to feel 'ownership' of this concept. There is an enticing patriotic allure of owning a concept, which can lead to better implementation as it is easily adopted by the population.

### **7.3 Theoretical Underpinnings for Tourism Conceptual Modelling in Brunei: Assumptions and Values**

The author has attempted to design a 'conceptual model' as an approach towards a theoretical framework for stakeholder tourism management in Brunei, which will enhance community participation in tourism. This model is applicable to the small state, it has guiding principles which lead to environmental-friendly and sustainable practises in Brunei. It is locally 'owned' and serves as a source of nationalistic pride and honour. As it is 'owned' by the people, its applicability and ease of reference will be easier as is based on implicitly known information. Their uncomplicated process is designed so that the local community can immediately adhere to it. There are various assumptions that form the premises for the development and construction of this model namely: the concept of tourism under the Islamic model of development, prioritising community needs, restructured channels of tourism management, aims and objectives.

The author wishes to emphasise that the following assumptions are based on her own deductions throughout this study. The attempt to conceptualise Bruneian tourism is relevant because the author originates from the country itself and subscribes to the Malay Islamic Monarchy concept. This concept thus has real and valid relevance because it represents a local Bruneian viewpoint. The theoretical underpinning of this model which includes the Malay Islamic Monarchy (MIB) has already been discussed in Chapter 2.

Islam teaches peace and rational thinking. The researcher feels that the model may be more palatable to the Muslim population because it is based on ideological values and practises. These values and practices have not been designed by Man but by divine creation. The basic premise here is that one cannot really argue with God and God's law. Thus any prescribed modes of conduct deemed as ethically and morally acceptable under Islamic thought such as the conservation of resources, community based consultation, fair trade and so forth are management practices that do not need Man's seal of approval, it was already pre-approved.

Brunei truly is 'a land of unexpected treasures'. It is very rare to find a country which is still governed by a centuries old system of absolute monarchy which staunchly upholds and nurtures its Islamic Malay culture. The researcher feels that its national concept can be used as a source of empowerment within the community to actualise its aims for tourism self-development. Hence, the principles of MIB is not a hindrance, rather it should be used as a safety guide-line. Islam releases the person to do 'amal markuf nahi munkar' (do good and prevent from evil). The person is liberated because the lines of what are good and evil are already clearly stated. There is no grey area that can lead to confusion.

With regards to the development of this model, the first assumption will focus on the re-conceptualisation of tourism from a Brunei Malay Islamic perspective. The author suggests that the term 'tourism' be re-conceptualised to have a different and deeper meaning to Bruneian Malay Islamic culture. Tourism is a phenomenon, which entails travel to far off places. The tradition of visiting foreign places is not a new phenomenon in many cultures and religions. Many places of interest are for pilgrims, which have deep cultural and religious meanings for its visitors.

The author believes that the term 'tourism' has a wider and more culturally sensitive meaning as it is connected to the concept of 'visitation' which implies an active act of worship for the purpose of appreciating, acknowledging, to give thanks to God for the variety, beauty and unique natural beauty that

surrounds us. Muslim countries are familiar with the term 'litaarrafu' which widely means to create understanding amongst men i.e. to know others and through knowing others is to know one's self and thus to know of and appreciate God's creations. This includes an appreciation of the natural environment that is the most important resource exploited in tourism.

There have been many investigations into the problems encountered by host destinations such as cultural dilution, ineffective tourism management, environmental degradation and so forth. These problems are being encountered in the Brunei context. The researcher believes that the only solution is to respond to the tourism problems subject to injunctions stated in the Quran, Hadith and Sunnah (sayings and traditions of the Prophet PBUH), 'Ijma' (mutual consensus on agreed practices) and 'Ijtihad' (fresh thinking). The application of 'fatwas' or religious rulings produced by Islamic scholars are applicable in tourism and indeed for any other activity because they are considered to be the best solutions to problems based on rational and logical thinking.

As the concept of MIB reflects the principles of Islamic development in nation building, the author considers the Islamic Model of Development to be applicable in tourism. In essence, this model depicts development as a goal and value-oriented activity that optimises human resources in many dimensions namely the moral and material, the economic and social and the spiritual and the physical. These dimensions are all interlinked and cannot be separated.

The ultimate objective is simply the physical and material realities of goal actualisation but reaches beyond this material world and into the hereafter. Goal achievement in the Islamic Model of Development is therefore different from contemporary concepts of development because it does not delineate the achievement of goals purely within this world. Rather, it addresses the issue of welfare that extends to the life hereafter and that there is no conflict between the spiritual and material world.

The Islamic faith states that Man is the vicegerent of God. Man is entrusted to take care of God's belongings i.e. this world and everything that is in it to seek God's blessing now and in the hereafter. Man is entrusted to do this job according to God's covenant, which may not be changed. Man is subject to the covenant of God not to any other forms of imperialism or sovereignty. Taking good care of God's entrustment will bring about rewards in both physical and spiritual worlds.

The notion of travel itself is not an action that is prohibited in Islam provided the intention to travel is 'good' and the proposed destination is not a place that promotes activities, which may corrupt the person. This would eliminate places such as Las Vegas with its liberal gambling industry and the notoriously sleazy beach resort of Ibiza with its 'sun, sand and sea' image. Place such as the UK which offers heritage tourism, Disneyland in America which offers good clean family fun and entertainment are considered to be better choices because they involve activities which entails the appreciation of different cultures and promotes beneficial activities such as strengthening family ties and education.

There are specific Quranic verses which encourage travel to know of other cultures and races (e.g. Al-Hujurat:13). Furthermore the concept of hospitality in Islam is regarded as an act of worship and as a service to God. Muslims believe that the guests should be treated honourably and cannot be turned away as each visitor is believed to be a blessing in disguise. The first three days, which a guest stays under the hospitality of the host, is regarded as necessary charity. Staying for more than three days would be regarded as causing inconvenience to the host unless both host and visitor has agreed otherwise. Thus Islam gives positive affirmation which encourages the person to both travel and also be a hospitable host to travellers. This guest and host relations is part of the amalgamation of the tourism industry.

Thus it can be interpreted that the tourism industry is not necessarily an activity that is immoral and unethical when guidelines are provided and



followed that clearly dictates what is lawful and unlawful under Islamic law. It can be a rewarding activity for both the host and the tourist.

From a Malay perspective, the Malay term for culture is 'budaya'. This is derived from two other terms 'budi' and 'daya'. The former term budi' means kindness or good deed whereas the latter 'daya' denotes power, capacity and ability. It is apt that Brunei has chosen to exploit its culture as a tourism asset and product because the Bruneian people are well known for their great capacity for being hospitable, kindness and generosity. As aforementioned, kindness and hospitality are considered as acts of worship thus in offering hospitable services to guests, the Brunei Malay Muslim who are participating in 'halal' tourism and hospitality businesses are not only gaining worthwhile and meaningful employment and livelihood from this industry but they are also undertaking a form of worship.

The researcher also believes that tourism can benefit from a fresh injection of morals and ethics. If this industry were to promote moral and ethical business conduct, the researcher believes that the overall multiplier effect would be achieved to filter through to the local communities. In this aspect, no persons would feel disadvantaged or marginalised. It would be truly a 'win-win' situation as claimed by the Bruneian BTDU. This scenario of perfect harmony would however be idealistic and aspires to utopianism.

However, in the Bruneian context, morally, ethically and responsible tourism development and planning may become an achievable goal. This requires the input of governing agencies which can provide moral and ethical guidance in governance. This agency is the Ministry of Religious Affairs. The researcher believes that the involvement of this Ministry is important in overcoming conflict in endorsement of the industry as a permissible and valued industry for Muslims. It was also conclusively found in the study findings that many people believe in greater deeper involvement of this ministry in tourism development and planning.

As Brunei is an Muslim country, one can assume that one aspect of the amalgamation of components of this host destination would be its Islamic culture. However, the researcher notes that this form of tourism is limited to cultural appraisals of artefacts such as visits to the numerous mosques in Brunei. A year long calendar of events was prepared for VBY 2001 and only one out of the thirty-eight major events, only three events were directly linked to a celebration of its Islamic heritage. This includes an International Islamic Expo, Gerai Ramadhan (nightly food stalls during the month of Ramadhan) and Hari Raya Aidilfitri (post-fast celebrations).

The researcher believes that this sector should be exploited even further and may be strength for this industry if the Muslim traveller segment is tapped. The researcher makes this assumption based on the evident success of the International Islamic Expo held in August 2001. This event promoted domestic tourism as well as international arrivals. Surprisingly, it was organised by the Ministry of Religious Affairs with minimum input from the Brunei Tourism Unit itself. Local turnout was excellent even when entrance fees were levied. A beauty pageant organised by the Ministry of Religious Affairs was also touted as being a success.

Another finding which supports the need for an ideologically specific tourism model of community development is the concept of 'tawakkal'. The concept of 'tawakkal' involves leaving things in God's hands and having firm faith in having God's will. The researcher encountered numerous comments from both questionnaire respondents and interviewees who have emphasised that tourism is an activity that Bruneians can prepare for but ultimately, it is up to God's designs to make it successful or a failure. Is there a place for tawakkal in tourism management practises? The researcher believes that there will always be this firm optimism in Brunei.

The second assumption focuses on prioritising community needs. The importance of prioritising community needs is also an issue, which is actively encouraged under Islamic tenets. As aforementioned, Man is responsible for his own actions that exert an impact in from the present, future and hereafter.

Man is therefore accountable for creating a community that is socially and morally strong. The Bruneian community, which is predominantly Malay Muslims, is encouraged by government to help build a strong, moral, sensitive, cohesive and spiritual community as evidenced by numerous royal decrees and nationwide Friday prayer sermons which have been endorsed by the religious authorities in Brunei that address this aim. Building this community takes time and effort and bridging the gaps in society is based on proactive addressment of community issues.

Community participation and involvement is a precursor to avoiding conflict. It enables for conflict resolution through considerate discussion. There are many examples in the Quran and Hadiths that specifically emphasise the importance of the community and valuing the values and judgements of others. Strategic planning is a process that place high value on personal judgement of people. Community tourism development enables the members of the community to feel appreciated because their judgements mean something and has value to others. It is a mechanism that can, if implemented properly and effectively leads to mutual decision-making i.e. decision-making by consensus. This is the essence of tourism stakeholder management.

Recently, the need for effective and efficient stakeholder management was highlighted in Brunei when the Economic Development Board actively started to ask members of the business community and professionals for input into improving the business climate in Brunei. This proactive approach should have been instigated and maintained as a norm from the very start. Values and judgements of those who have certain vested interests in the industry should be sought as a basis for remedification of any inefficiencies that may exist within the current contextual situation.

The Bruneian community as a whole has a small population base. Thus in theory, it should much easier to implement mechanisms that encourage local community participation in tourism development and planning. The community performs a great service to the environment as they are the protectors of this physical entity. Relating this social responsibility to the

Islamic faith is exemplified in the Quran which stated that Man is responsible for sustaining the environment, to protect the natural beauty and not to undertake activities which can diminish the environment's sustainability for future generations. Other verses relate to environmental conservation, prevention of wasteful and frivolous activities. All these are applicable in sustaining an environmentally friendly tourism industry in Brunei.

With regards to community and stakeholder awareness of the true significance and value of tourism, the local government, tourism associations and the Brunei Darussalam Economic Council (local economic development organisation) must work in tandem with other regional tourism associations. There must be more done to increase the effectiveness of current awareness-raising campaigns. There must be accessibility to tourism data, assistance and advice for the community, tourism businesses and the service sector.

Secondly, tourist officials must endeavour to undergo a more rigorous analysis of stakeholder needs, desires and wishes. A correct representation of community needs must be uncovered as they are ultimately the stakeholders whom tourism should benefit in the long run. They serve as the value makers in the value chain of tourism as they are the actors who provide tourism related activities as well as being the host.

A change in leadership style is needed. The BTDU must clearly formulate the clear and concise goals that will lead to strategic change. The means of implementation must also be established along with institutions that will support the processes in which these policies may be actually implemented. The Islamic development model suggests that leadership is an issue that is based on an open vote. The community has a valid say in whom to elect as their leader. A leader is selected based on his ability to lead and also on his knowledge of the industry. The basic principle is that he is selected because of the faith that is placed on him by the community. This position is not a permanent one. Rather, the community can select another individual to replace the leader if the latter is deemed to be under-performing and has not reached the objectives. The community is empowered to make executive

decisions pertaining the leadership for tourism development in Brunei for the better of the community as a whole.

This relates to the individual who is selected as the leader in this process. The leader must have the appropriate motivations to perform his duties according to the laws, culture and religion operating in Brunei. This duty is not a light one because of the spiritual connotations involved. Strategic planning requires the planner to think through every possible scenario to overcome potential threats, capitalise on any strengths and be flexible and proactive. There has to be contingent plans for any eventuality. This industry, fragmented and segregated as it may be therefore requires great consideration from beginning to end.

The end for the Malay Muslim tourism planner is not just an end to the physical self but extends to the spiritual after life. The beginning and end of every action has repercussions on the now and hereafter in Islamic perspective. Adherence to this principle and philosophy will help to ensure that tourism practices are for the good now and in the hereafter. The leader is entrusted with the job to perform a social duty to others. In the event of any unwanted socio-cultural or economic negative side-effects, the tourism planners and implementers must rectify the situation and not allow the degeneration to continue to the detriment of others. However, the above depends on the tourism planner to be morally and ethically sound. Therefore emphasise must also be placed on producing moral and upright citizens in Brunei who can guide others to doing good not only in tourism development but in other matter as well.

#### **7.4 Discussion on the Model for Brunei**

The author realises that a model is needed that will go beyond financial efficiency. It requires a change in governmental thinking to become catalytic, community-owned, competitive, mission drive, results-oriented, customer driven, enterprising, anticipatory, decentralised and market-oriented. It is

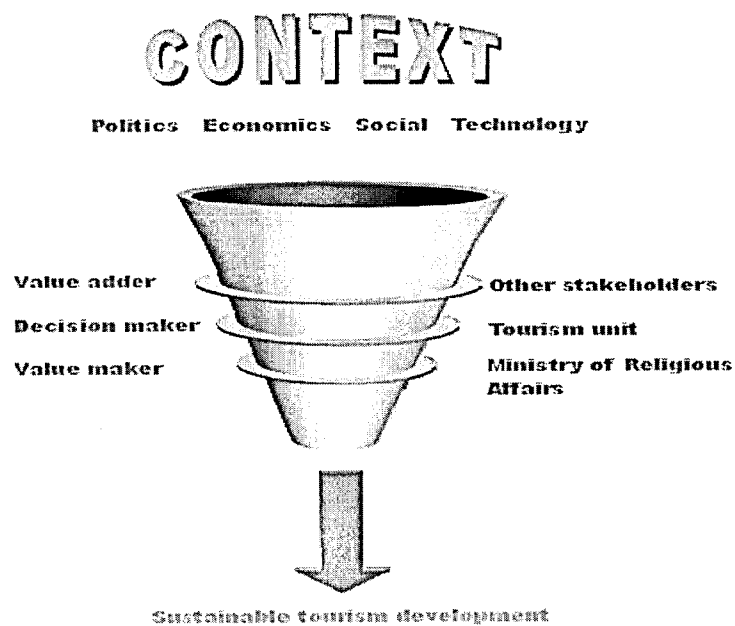
hoped that this model if applied in an efficient and effective manner, it may help to achieve the proposed recommendations.

In this model, the tourism planner makes the context of tourism i.e. the political, economic, socio-cultural and technological aspects of tourism known to the community (Fig 1). This entails actively educating the locals about tourism. Thus enhancing tourism education should be a priority. This should extend from primary school to higher levels for policy makers. An educated human resource pool is more likely to be able to make better and informed judgements about future tourism development policies. The stakeholders are empowered to propose plans for development within their own jurisdiction.

With this new knowledge, they can effectively add value to the local tourism product. In their role as value-adders, they can help to enhance the tourism experience by providing greater courteous hospitality to the guests.

It maybe helpful to readers to formulate the issues diagrammatically as in Figure 1. There is an overall context which maybe broken down into the usual elements of political, economic, social considerations and technology. Within this context tourist policies and initiative maybe generated where some groups are primarily adding value, but which may impact on and benefit other stakeholders. Such policy initiatives need to pass the Tourism Development Unit as decision-maker, and to be acceptable to the Ministry of Religious Affairs as the ultimate arbiter of values in Brunei society. What may and should emerge from this process is sustainable tourism development.

**Fig 1. The Consultative Tourism Model for Brunei Tourism Management,  
Planning and Development**



Their tourism involvement is considered to be value-added because they can improve the quality of life. An improvement in this dimension entails an enhancement of the following: social opportunity, personal health, personal development in time and leisure, purchasing power of goods and services, quality of working life, personal safety and justice and finally, the physical environment.

The author highly recommends that the community members unite together to form co-operative, collaborative groups or associations, which aims to investigate and facilitate research of perspectives on tourism development and progress within the community area at local grass roots level. An expert tourism planner or representative must be at hand to offer guidance and help facilitate this process. The results of this research will eventually lead to a management plan which then may be presented to either the tourism planners, tourism businesses or other interested parties (e.g. tourism developers).

In this way, community-based tourism will have already been initiated and the system put in place to enable communities to enjoy the sense of empowerment and ownership of tourism management within their own immediate area. The author notes that a similar system is already in operation in Brunei at local level. These are the Community Consultative Committees which are government elected representatives of the committee (refer to Chapter 5). However, the major difference is that this community consultative association is not based on the need to develop tourism in particular. Rather it is a grouping established to cover general issues of community life. It is led by a government-elected village leader who is usually a retired civil servant and typically comes from the elder generation whose interest and capacity in initiating tourism development may be limited. Here, the leadership must be male whereas female participation in the groupings is limited to minor duties such as the stereotypical secretarial role or cleaner.

The writer propose that this grouping form to address tourism issues only, that membership is open to all ages irrespective of age and that chairmanship of this collaborative group is not gender biased towards men. The position is an open and democratic vote for all. The aim of this plan is to increase rates of visitation by visitors from both foreign and local base. It also aims to promote its distinctive local culture whilst minimising or avoiding cultural dilution and degradation. This exercise will help to create awareness and increase community-wide concern for management actions which directly impact on their personal and community lives as a whole. The lack of concern amongst the local population of management plans and its implications on the community is an issue of concern that has materialised in the study. However, it is very likely that the participants of these collaborations are active members of the local community themselves who feels that tourism will have the most influence on their normal life patters and community strata.

This local level tourism community council will be automatic members of the National Tourism Council (NTC) whereby the collective community groups can act in one united voice. On individually, these tourism community council can undertake research that may entail an assessment of the viability of



indigenous and ethnic group participation at local level as suppliers of tourism products. Commoditisation of cultural resources has always been used as alternative means of increasing, enhancing or initiating economic activity for revenue and profit. This is a commodity that is in great demand by visitors and the supply of which is plentiful in Brunei especially amongst the indigenous people and ethnic groups in Brunei. At grass roots level, investigation into the needs of indigenous people must be carried out with regards to the potential to develop indigenous tourism enterprises.

The interface between the local community and the tourism business enterprises should be monitored. Both parties are required to be proactive in pursuing the values of others. Cooperation is required from sets to ensure that tourism's multiplier effects will be translated into the wider economy to generate jobs, improve the quality of life of Bruneians and to earn more tourism dollars that will create more money in the future.

The interface sessions require formal and informal processes and procedures. Both parties may enter into consultations privately to discuss tourism plans that require the local community's input. Both parties must start the discussion with an open mind, willingness to listen to people's opinions and to accommodate each others wishes to ensure fruitful discussion which minimises conflict and maximises the benefits for all involved.

Once the plans are reached and finalised, representatives from both parties may then propose the plans to the Tourism Board that acts as the decision makers. They are entrusted with this because they have the most tourism experience and knowledge that may help to steer tourism development in Brunei. The mechanisms for effective communication are established through meetings with the relevant parties.

Once the Tourism Unit has approved the plans, the plans are then forwarded to the Ministry of Religious Affairs (MRA) who will give the final seal of approval. This requires close workable cooperation between the ministry, tourism professionals and analysts. In this role, the Ministry of Religious

Affairs are the value-makers as they can 'make or break' the proposed plans even before implementation. They actualise the value of the plans by conducting checks on them which determine what can or cannot be included in the plan according to Brunei Islamic Malay laws. In summary, they are the protectors and upholders of the MIB philosophy in tourism.

Tourism can only succeed in Brunei and receive more community support if there is clear support for this industry by this Ministry. It will send a direct and clear message to the people that tourism does not conflict with the Islamic faith if conducted in a spiritual, moral and ethical manner.

The researcher understands that industry players will be deeply concerned as this model may lead to excessive dependence or over-reliance of the religious dimension. The alcohol ban is one such example which has been frequently criticised for making Brunei less attractive to western tourists. The researcher has encountered many research study participants who have suggested that a balance or trade-off is needed to satisfy the need for tourism receipts and the preservation of ideological beliefs. Some hoteliers would like to offer guest room mini-bars in the hotels but Bruneian laws do not allow this. If the law permitted this activity, the government would be accused of being hypocritical and lax in implementing its own value systems. Furthermore, any action that supports 'haram' or non-permissible activities will be regarded with condemnation from the wider community.

It is natural for one to wonder how far Brunei tourism can realistically develop under these circumstances. This really depends on the tourism objectives: does Brunei really need the tourists and does this small country really need the tourist 'holiday money'? The answer would be yes; it needs tourists to bring in the tourism income. However, Brunei does not aspire to be another Ibiza with its mass tourism but has initiated carving out a small niche tourism market. The researcher feels that the BTDU should look into other 'non-western' markets to target as potential tourists e.g. the affluent Arab market.

Personally, the researcher cannot endorse such recommendations to create such trade-offs as this will have implications for this world and the hereafter. Hence the researcher believes that this may be the only way forward for the industry. Any proposed plans approved must have the conscious knowledge and official endorsement by the Ministry of Religious Affairs. This ministry should however also consult with other ministries if required.

## **7.5 Summary**

The researcher believes that serious reconsideration be given to fully actualising the potential of MIB in tourism development and planning in Brunei. It is not an invisible concept but one which is actively applied in Bruneian life, irrespective of religion or ethnicity. MIB is the common thread that links all Bruneian together thus its importance in Bruneian socio-cultural aspects of life cannot be marginalised or downplayed.

In line with implementing tourism under Islamic ideology, tourism should be conducted with 'ikhlas' or doing things with good intention for the benefit now and in the hereafter. All actions that may contribute to the development of this industry must be done with a clear conscience. The best option for Brunei's own tourism planners now is to implement the rational and sensible strategies which it may have for this industry and hope for the best. This involves implementing programmes and restructuring communication channels that will cultivate decision making by consensus as there will be more open cooperation and collaboration between the relevant stakeholders especially at community level.

As illustrated in the study, there is a sense of 'tawakkal' in public administration which is faith in God's will. However, the necessary strategies must be implemented and preparations made for all eventualities. The idea is that one can only prepare for the best and wait for the outcome. Islam believes that all good and bad things have been predetermined. Predetermination is not resignation which implies negative connotation or pessimism. Rather it is a tool which allows the person to see things clearly

with quiet detachment and acceptance of reality. It avoids blame, conflict and teaches steadfastness when things go wrong. It allows the person to move on with life and make for continuous learning and re-adjustment. The tourism industry has not been the panacea to Brunei's economic woes, but rather it has exacerbated it to a certain extent. Bruneian Muslims will accept this as fate and will undoubtedly strive ahead and hopefully learn from their mistakes. This is why Brunei needs to conduct this industry Islamically and why the MIB concept will remain an important cornerstone in its development.

## **CHAPTER 8**

### **CONCLUSION: TOURISM POLICY IN BRUNEI DARUSSALAM**

#### **8.1 Introduction**

Brunei Darussalam has embarked on creating a tourism industry because of its economic potential as an alternative source of income to oil and gas revenues. Studies and country reports have indicated that tourism can generate jobs, allow for a new influx of foreign revenue and have low start-up costs for tourism businesses. Furthermore, it is a relatively clean industry, helps conserve the environment, protects the host's nation's cultural heritage, and may help to increase the host nation's local community's quality of life. Therefore it seems logical and sensible for this industry to be developed further in Brunei.

However, tourism also has a negative socio-economic side that must be burdened along as well. In some cases, these dis-benefits may outweigh the benefits. Tourism is a notoriously fickle industry due to its seasonality. This seasonal nature means that most of the jobs are seasonal as well. It is subject to external threats which affect tourists travel such as war, terrorism, political unrest in a host nation and so forth. It is susceptible to financial leakage whereby the service provider's profits are 'leaked' away to external, non-domestic suppliers and proprietors. It can also instigate and exacerbate local inflation due to increased tourists' consumption. Tourism can also affect the socio-cultural fabric of the host country, induce more pollution, and stretch the destination's infrastructure and service. It may also affect the country by straining the 'environmental capacity' of a destination because the natural environment cannot accommodate the number of tourists' arrivals to the area.

This simply highlights the problems of developing a viable tourism industry without a thorough grasp of the knowledge and know-how involved in developing tourism. Therefore both planners and tourism managers must co-

operate to develop and maintain a synergistic relationship to ensure a sustainable and viable tourism industry. They must re-position themselves so as to consider both national and local tourism goals and to be more aware of its negative trade-offs. They will need to consider the tourism policies involved that will help to achieve these goals. This chapter will offer some assistance in creating a suitable tourism policy for Brunei Darussalam.

Section 8.2 refers to the nature of tourism policy planning in Brunei. Section 8.3 outlines the need to create trade-offs within the industry to assist its growth, development and future sustainability. Section 8.4 refers to recommendations on methods to nurture more local labour participation and a tourism-friendly business environment in Brunei. Section 8.5 is the concluding chapter which provides an outline of future research directions for tourism in Brunei.

## **8.2 Nature of Tourism Policy Planning in Brunei**

As aforementioned in Chapter 2, the BTDU under the auspices of the ministry of Industry and Primary Resources are spearheading Brunei's tourism. They have three broad roles namely, planning and co-ordination, marketing and promoting, and administration. Under planning and co-ordination, they have to define the strategic mission for tourism development in Brunei. This also involves monitoring the industry. They are responsible for implementing tourism-related policy and to co-ordinate with other government bodies involved in tourism. They are also in charge of establishing a high-powered Tourism Committee, which will assist in creating tourism policy in Brunei.

In terms of its marketing and promotion roles, the BTD is responsible for creating tourism awareness through both international and local promotional campaigns and marketing activities. They have to represent the host nation at trade and travel exhibitions, conference meetings and seminars. This department also prepares all promotional and marketing literature for

international consumption. They are also involved in the administration of licenses for travel agents, namely the renewal and approval of licences.

The above roles clearly indicate the limited policy-making authority and powers of the BTB. In fact, as the findings have shown, there are few tourism-related policies in Brunei which have been enforced much less combined into one single tourism policy. This is because there are too many government bodies that can implement policies that affect tourism either directly or indirectly. These government bodies lack effective communications with other departments and this failure to achieve transparency has tremendous detrimental effects on tourism policy planning.

According to research conducted by KPMG, a total of nine ministries are involved within tourism in 1998 (Table 1). These are: the Ministry of Industry and Primary Resources (Tourism and Forestry Department), Ministry of Home Affairs (District Office and Immigrations Department) Ministry of Development (Public Works Department, Town and Country Planning and the Environmental Unit), Ministry of Finance (Economic Planning Unit), Ministry of Communication (Land Transport Department. Civil Aviation and Marine Department), Ministry of Education (Curriculum Department and Technical Training Department), Ministry of Culture, Youth and Sports, Ministry of Religious Affairs and Ministry of Labour. Their respective responsibilities are detailed in Table1.

**Table 1. Government Agencies Involved in Tourism Development and Planning in Brunei in 1998**

<b>Government Institution</b>	<b>Responsibility</b>
<b>Ministry of Industry and Primary Resources</b> <ul style="list-style-type: none"> <li>• Tourism Department</li> <li>• Forestry Department</li> </ul>	<ul style="list-style-type: none"> <li>• Planning and co-ordination, promotion and marketing, administration and licensing</li> <li>• Ecotourism /recreation management within National Parks</li> </ul>
<b>Ministry of Home Affairs</b> <ul style="list-style-type: none"> <li>• District Office</li> <li>• Immigration Department</li> </ul>	<ul style="list-style-type: none"> <li>• Provision of related facilities, e.g. bus/taxi stands and rubbish collection</li> <li>• Visa procedure and arrivals statistics</li> </ul>
<b>Ministry of Development</b> <ul style="list-style-type: none"> <li>• Public Works Department</li> <li>• Town and Country Planning</li> <li>• Environmental Unit</li> </ul>	<ul style="list-style-type: none"> <li>• Developing supporting infrastructure</li> <li>• Planning approval and land zoning</li> <li>• Environmental impact monitoring</li> </ul>
<b>Ministry of Finance</b> <ul style="list-style-type: none"> <li>• Economic Planning Unit</li> </ul>	<ul style="list-style-type: none"> <li>• Budget approval and compilation of statistics</li> </ul>
<b>Ministry of Communication</b> <ul style="list-style-type: none"> <li>• Land Transport Department</li> <li>• Civil Aviation</li> <li>• Marine Department</li> </ul>	<ul style="list-style-type: none"> <li>• Issuing permits for taxis, buses and car rental; and public transportation</li> <li>• Airport management</li> <li>• Permit issuance for boats within Brunei's tidal zone</li> </ul>
<b>Ministry of Education</b> <ul style="list-style-type: none"> <li>• Curriculum Department</li> <li>• Technical Training Department</li> </ul>	<ul style="list-style-type: none"> <li>• Tourism awareness</li> <li>• Tourism/hospitality vocational college management (Maktab Teknikal Sultan Saiful Rizal) and programme planning and development services</li> </ul>
<b>Ministry of Culture, Youth and Sport</b>	<ul style="list-style-type: none"> <li>• Cultural heritage promotion (e.g. handicrafts)</li> </ul>
<b>Ministry of Religious Affairs</b>	<ul style="list-style-type: none"> <li>• Minimise and control negative impact of tourism</li> </ul>
<b>Ministry of Labour</b>	<ul style="list-style-type: none"> <li>• Immigrant labour policy</li> </ul>

Source: KPMY Research, Tourism Masterplan 27<sup>th</sup> November 1998 (pg.52)

As illustrated, there are too many agencies involved with policy implementing powers that has lead to duplication of roles, resource wastage and inconsistent achievement of national and local tourism goals. This is an undesirable outcome of having low communication between ministries.



Before a comprehensive policy for tourism can be formulated, it is essential that the common problems and limitations facing this industry in Brunei be identified and duly addressed.

- a) There is no one comprehensive body, which can create and implement tourism policies in Brunei. Such a body would have to be powerful enough to mobilise and gain the support of the other ministries. The yet to be established Brunei Tourism Committee will hopefully serve this role.
- b) The MIB national philosophy is an interesting paradox in tourism as it can both be an advantage and an obstacle to growth in this industry. It must be considered at all levels of tourism planning. However, these tenets cannot be compromised purely for the sake of pursuing economic gains.
- c) The supply and demand for human resources that can match industry needs in terms of quality and quantity to cover both the short and long run is inadequate. Ultimately, human resources in tourism must be sustainable according to seasonality.
- d) Weak promotional and marketing activities in both local and foreign venues have failed to generate enough touristic awareness which will translate into greater numbers of tourists arrivals into Brunei.
- e) Tourism infrastructure development is very capital-intensive in Brunei's case so it must be a private and public sector initiative because of budgetary restraints faced by the government.
- f) Effective, systematic and well-co-ordinated environmental management is very much lacking in Brunei. As Brunei is marketing itself as an ecological paradise, care and maintenance of its ecological and environmental heritage is essential. All tourism development plans must therefore entail in-depth environmental impact analysis to avoid future problems before the start of any planning. In essence, environmental policies, laws and legislation must be drafted for this purpose and equally important is the

enforcement of such policies. As yet, there is no agency, which can enforce such policies.

- g) Accessible, convenient and affordable air transportation links to Brunei must be reconsidered. This is a major challenge for Brunei's inbound tourism sector. The number and nature of visitors to Brunei is affected by seat capacity, flight routes and linkages through airport hubs, flight times, competitively priced airfares, airport capacity, flight schedules and frequencies, airport facilities and in-flight facilities (alcohol and smoking restrictions are enforced on Royal Brunei Airlines).
- h) It is also essential that research, which is systematic and thorough, be undertaken pertaining to the socio-economic impact and benefits of tourism in Brunei. This is important because then planners and policy makers can formulate policies that are pro-tourism. Any weak and ineffective practices or policies which are hindering tourism development may then be converted into opportunities by undertaking effective research utilising the appropriate tools and techniques of research methodologies. The importance of such findings will serve to highlight the socio-economic importance of tourism to policy-makers and perhaps this may help to initiate higher prioritisation of tourism in Brunei's policy-making and planning processes.
- i) The government still has many challenges to overcome current travel policies which have constrained, impeded and restricted travel into Brunei such as visas, border formalities, customs regulation, travel access and other related regulatory issues such as importation of alcohol for personal consumption by a non-Muslim visitor.

Establishing a tourism policy in Brunei is a necessary requisite and stepping stone in implementing Brunei's tourism strategies. This vital first step to be undertaken carefully by the appropriate tourism groups at all levels (local, national and regional) is designed to create acceptable trade-offs within the tourism strategy process. It is a guiding mechanism that represents the values

of the host destination that dictates how present and future tourism issues are analysed and addressed. A tourism policy can guide the host nation in all its actions pertaining to this industry within acceptable norms.

Tourism is a highly dynamic industry, which requires careful and flexible navigation. Therefore as a guiding principle, tourism policies should never be a static statement. Rather it should be flexible and dynamic, and is adaptable to both supply and demand changes. This tourism policy should help to create a strategy, which can never ever aspire to perfection in practice but should state clearly its developmental missions, goals and objectives. Therefore Brunei's tourism policy is likely to pave the way for a compromise of a series of trade-offs that the host destination finds comfortable and non-conflicting.

### **8.3 Creating Trade-Offs**

Tourism strategic management is a fine art. The trick is to juggle a dynamic and imperfect tourism strategy in a volatile environment, which is dictated by western market forces. Creating trade-offs to achieve certain goals and objectives are sometimes necessary. In Brunei's case, four potential trade-offs have been identified, which the tourism authorities are likely to encounter and necessarily address. These are trade-offs between MIB and modernity, FDI and financial leakages, co-ordination and consultation, and specialist tourism and generalist tourism.

Perhaps the most important challenge in developing tourism in Brunei is the problem of reconciling Brunei's national philosophy and values of a Malay Islamic Monarchy ('Malayu Islam Beraja' or 'MIB') with touristic demand and supply market forces. This concept has already been defined at length in Chapter 2. These values have existed and been practised within Bruneian society for more than 500 years. It is the framework which shapes and guides Bruneian Malay life and has appeared to endure the test of time.

Indeed the MIB values have deep implications on tourism policy and strategy in Brunei as illustrated in the data findings of this study. As a religious construct, the Islamic component of this philosophy is not subject to change easily. This is because the laws have been decreed not by man but by divine power. Strict laws and codes of conduct have been laid down which governs Islamic life for now and the hereafter. Islamic scholars may only change vague laws subject to intense consultation and mutual agreement amongst other learned scholars.

These governing laws are enforced in Brunei thus dictates what this Islamic host destination can and cannot do. What Brunei can and cannot do is translated into what it can and cannot offer in terms of creating a variety of its tourism product offerings to tourists. The current strategy in Brunei is to target mainly western tourists from Germany, Australia, America and the United Kingdom. It is generally accepted that western notions of an ideal holiday differs to that of non-westerners. The former may emphasise and seek to have a 'sun, sex and sea' holiday experience whereas the latter may emphasise less hedonistic and more culturally rewarding holiday experiences. In Brunei, as its strong religious values have already to some extent pre-determined its tourists product offering which eliminates sources of hedonistic activities, the choice on offer to western palate is limited.

Brunei as noted earlier enforces a strict alcohol consumption law whereby non-Muslims are prohibited from its consumption. The government however has allowed private alcohol consumption by non-Muslims in restaurants and hotels provided the liquor has been brought into the country personally after proper declaration of such goods at Brunei's immigration points.

The behavioural implication of this MIB concept is also wide reaching. Tourists are encouraged to dress modestly whilst visiting this country. Indeed, as this research has shown, improper tourist behaviour will not be tolerated in Brunei's society (e.g. a tourist wearing improper clothing in a restaurant in Brunei received a word of caution from the Tourism Board in Temburong). Access to entertainment is important on one's holiday experience. This is

however a limited commodity in Brunei as there are no nightclubs or bars in Brunei. Such activities are considered immoral and hedonistic by the Brunei government. This is a constraint on the tourism product offering for visitors to Brunei. To get this entertainment value and access to alcohol, tourists have to cross the border to either Sabah or Sarawak where the Malaysian government has more lenient rules in operation in the services sector.

With regards to creating trade-offs between MIB and modernity, the author personally cannot find any justifiable reason to change or compromise the MIB values to suit modern times with regards to alcohol and entertainment services in Brunei. The author draws on an opinion offered by a Malaysian tourism practitioner who stated that 'it is a shame that modern Malaysia is being unravelled both spiritually and morally because it allowed for free alcohol consumption'.

The author finds it commendable that the Brunei government is not compromising on this issue because the socio-cultural and economic costs of allowing for this provision may ultimately lead to negative changes, which will overwhelm Brunei's traditional society. The strict ban on alcohol consumption was not created by man for man but was created for man by God. This is not negotiable by anybody and therefore it must be upheld. The author also feels that venues offering immoral and hedonistic activities such as nightclubs are rightly prohibited in Brunei.

The MIB construct leads the way to creating a 'clean' holiday destination for Brunei as a host country. The tourism authorities in creating alternative tourism strategies for Brunei should look at other ways to fulfil tourism needs or to create tourism needs which Brunei as a host country can fulfil. The author believes that this is a more viable option for sustainable tourism development in Brunei. There are other market segments, which have been overlooked in the Tourism Masterplan. For example, Brunei is seeking to get the educated and cultural family-based tourists from the western developed nations. A viable alternative tourist segment is the affluent Arab market which is well educated and shares a similar faith.

The Malaysian Tourism Ministry has deliberately targeted this market segment in recent years and this strategy has successfully brought about increased tourists arrivals from the Middle Eastern countries. The attraction in Malaysia is that it offers the Arab visitors the cultural and religious elements. One is able to have a truly Asian holiday experience whilst observing the faith. They have easy access to mosques for prayers and most restaurants and hotels serve halal (Islamically acceptable) foods and beverages. Some hotels even have segregated times for women and men engaging in recreational sports and leisure/recreational activities in Malaysia. This is very attractive to the Arab market that prefers to have single gender as opposed to mixed functions and activities.

Brunei can also offer these elements. This is a strategy that Brunei's tourism authorities should actively research and adopt. The six star Empire Hotel may serve as an exclusive hotel for the affluent Arab market which offers excellent family based activities. The Arab visitors may still practise their faith easily whilst viewing the 'cultural other'. However, regardless of the nature of the tourists into the country, tourism revenues will be affected by any financial leakage that occurs in the industry.

The term 'financial leakage' has already been discussed in great detail in the literature review. Financial leakage from non-touristic activities is already occurring in Brunei because Brunei's own local needs and demands cannot be adequately supplied locally. For example, rice is a staple diet in Bruneian cuisine and it has been imported for many decades because Brunei cannot produce enough quality rice in for the whole population. Another source of financial leakage is in the exportation of wages earned by foreign labour of which Brunei is heavily dependent on. As they cannot even meet local needs and demands, they are also unfortunately unable to meet tourists' demands and needs.

In touristic terms, the host nation's size, structure and variety of product offering affect revenues gained through tourism. It is vital to analyse and assess fully the tourists total spend in Brunei (namely on what they actually

buy or spend) as this will determine the amount 'leaked' away and the amount which is retained and recycled within the local economy.

As Brunei's own local suppliers cannot meet the needs and demands of its international visitors, these items must also be imported and paid for out of tourism revenues. These imported supplies are not delineated to simple food items but consists of all items that are connected to this industry that cannot be supplied and produced by local suppliers and vendors. This includes payment for imported service providers as well such as foreign staff, foreign-owned hotels or non-local tourism venues and attractions.

Ownership of tourism attractions, local facilities and venues also impacts on the amount 'leaked' away. This amount is more likely to be minimised if such facilities were locally owned and locally-sourced. However, there is greater risk of financial leakage if they were operated and owned by foreign companies who remit their local profits to their parent company located overseas. Therefore local profits are minimised leaving a smaller local benefit on the host destination's economy.

This is further related to the economies of scale, which also leads to financial leakage in Brunei's economy. Foreign owned companies, which operate tourism facilities in Brunei such as the Sheraton Hotel, tend to purchase supplies and human expertise and management from overseas regional or central suppliers. Again this has a negative impact on the overall economic benefits of the host economy especially when the latter fulfils the job roles which may be given to locals. These wages to foreign service providers are sources of financial leakage as they dispatch their monthly salaries to their home countries.

The Brunei government is trying hard to entice foreign direct investment into this country especially in terms of tourism infrastructure and development. However, the very real negative prospect of reduced or non-actualised profits and benefits actually felt in the local economy due to financial leakage from foreign-owned tourism revenues must be weighed carefully by tourism

practitioners in Brunei. This is where a trade-off between the need to increase foreign direct investment into Brunei's local economy and financial leakage leaving the local economy must also be considered.

A major hindrance to foreign direct investment into Brunei is legislation that prohibits investors from suing the Brunei government and seeking legal redress in cases of breach of contract. This is because Brunei is operating under a State of Emergency law that was enacted in 1959 to curb a nationalistic uprising. For example, an international hotel establishing a hotel franchise in Brunei entering a contract with the Brunei government should have access to government owned facilities such as water, electricity and so forth.

However, should the Brunei government incur water shortages or electricity power cuts, which affect the service quality, provision capabilities of the hotel such that a loss of profit is incurred, the hotel cannot sue the government for breach of contract. This is a major obstacle in attracting foreign investors into Brunei. To take legal action against the government of Brunei is to take action against the sovereignty of His Majesty the Sultan of Brunei who is immune to all legal prosecution under diplomatic immunity laws.

The author proposes that in undertaking tourism as an activity with minimised financial leakage and maximised local benefit, appropriate strategies must be implemented to address the former. This basically entails a change in the tourism supply and production chains in Brunei, which emphasise localisation of all tourism-related activities. This means that anything and everything used in creating, developing and maintaining the service product quality of this industry should be locally sourced and not sourced from abroad wherever possible.

Essentially, a local supply chain should be formed in Brunei which can cater to tourism business needs and wants. This is however, quite problematic in itself but will maximise local economy in the long run and create competitiveness in Brunei's weak private sector.



Brunei's private sector has been struggling to achieve competitiveness, which has so far eluded it. A multi-industry environment requires careful identification of the real key players. These key players are the value creators and destroyers whose impact upon value creation within Brunei's small economic, political, environmental, cultural and technological environments are all interlinked. Each relationship must be managed simultaneously.

Local suppliers and wholesalers in Brunei are frequently more expensive and less competitively priced than their overseas counterparts for example those based in Miri in Eastern Malaysia. Miri is a favourite tourist destination for Bruneians due to its good shopping facilities. This is due to favourable exchange rates between the Malaysian ringgit and the Brunei dollar (BND\$1.00: RM2.00). However, those operating in the tourism business should employ local suppliers and wholesalers and negotiate good competitive prices for their services. There should be clear negotiation to ensure that the goods or services delivered are acceptable to the vendor.

The localisation theme should be applied at all levels. This includes the employment of local service providers such as marketing services, accountants, lawyers, architects, contractors and so forth. The tourism business owners can help this industry by actively seeking out competitively priced local service providers to ensure maximum local benefit. This is also related to securing the necessary finance to establish tourism related businesses whereby only local Bruneian banks can finance tourism business activities. This should be made compulsory even to foreign owned operations as the monthly bank loan repayments are being paid into Bruneian-owned and operated financial institutions. Again, this will ensure that money is circulated back into the local economy.

An issue raised by respondents in the questionnaire is the lack of locally made arts and crafts souvenirs for tourists' consumption. Tourists have 'holiday money' which they are willing to spend on purchasing souvenirs and other products, food and beverages, sightseeing, transportation, and

accommodation and on entertainment (e.g. entrance fees). If these tourism products are locally produced, owned and supplied then tourism will indeed fulfil its economic role in being a local income generator for the host country. With regards to the lack of locally crafted souvenirs, the tourism authorities could help local craftsmen and artisans to be more aware of the potential income that may be derived from commercialising their products for sale as souvenirs. However, there is a danger of over-commercialisation whereby the quality of the souvenir is compromised for quantity.

Another concern raised by respondents in the study was the lack of local shopping facilities in Brunei. As pointed out by many participants in the study, Brunei does not levy any tax on imported luxury goods. This means that such goods are likely to be more competitively priced in Brunei than in other well established shopping havens such as Singapore. Tourism dollars may be earned in expanding the shopping facilities for tourists for luxury goods in Brunei. However, luxury goods must be imported from overseas thus financial leakage will still occur. The expansion of shopping facilities will benefit the economy if tourists are willing to buy local goods, which may or may not meet their personal subjective levels of quality.

Tourism in Brunei is a very selective activity in Brunei because of its limited tourist attractions, facilities and activities. There are currently two types of tourism offered in Brunei namely cultural tourism and eco-tourism. The cultural tourist is interested in viewing the 'cultural other' which is often painted as 'exotic' and 'different'. This type of tourism shows the cultural elements of the host country by showcasing its visible cultural artefacts such as cultural dances, museum exhibitions, its local tourists attractions and so forth.

The eco-tourist on the other hand is interested in the ecological and environmental treasures of Brunei's pristine jungles. They typically spend their holiday time at eco-tourist attractions and venues, which is mainly situated in the Temburong district. Most of the tourists' attractions, facilities, hotels, venues and monuments are situated in the Brunei-Muara district with the ecotourism industry neatly segregated in the Temburong district.

This effectively means that the channels for visitor spend is limited to two main districts in Brunei. The channels are also diminished because of the lack of variety in Brunei's tourism product offering. It is preferable that such facilities are owned, managed and operated by locals to help prevent financial leakage from occurring. It is suggested that these activities and facilities be increased to encourage repeat visits and to enhance visitor's holiday experiences.

In limiting and minimising financial leakage, the tourism infrastructure must also be upgraded. Local materials for everything and anything to do with tourism in Brunei should ideally be locally sourced (e.g. foods, building materials). Even the architecture and buildings should be locally produced and supplied. The staff and management of tourism-based businesses must also be local. In summary, the host nation must review its localisation drive and encourage this to occur within the business community by offering rewarding incentives for pro-active locals who are keen to promote localisation within the economy.

However, in limiting minimising financial leakage, corresponding activities, which measures and monitors the progress of performance in minimising this leak must also be undertaken. The authorities entrusted to do this duty must also set suitable and appropriate benchmarks to ensure that objectives are reached and that tourism revenue into the economy is not 'leaked away' through other invisible channels.

In creating the trade-offs, it is very difficult to prioritise individual or collective stakeholders' aims and objectives but it must be done. Tourism means different things to each individual stakeholder group (Butler, 1996). Yet due to the relative powerlessness of each stakeholders group (e.g. community, national tourism organisation, private sector group etc), one cannot assume that those with greater vested interests in the sustainability and profitability of this industry are likely to have more power over the direction of its growth in Brunei.

The Brunei government needs tourism as a source of income alternative to its oil and gas, the local population needs tourism as a source of employment and income, the community hopes that tourism will help to preserve the culture and heritage of Brunei, the tourists expects maximised holiday enjoyment, the hoteliers gleefully anticipates full hotel room occupancy; the list of different stakeholder needs and wants is manifold. However, it may be safe to assume that the shaping force and agent of change in Brunei's tourism will be the government in the foreseeable future.

#### **8.4 Implications for Future Research and Recommendations**

An understanding of the processes, context and content of tourism must be achieved for any host nation wishing to adopt sustainable tourism development policies. However, this relies on collecting research data that has future reference for the growth of this industry. In Brunei, research on any discipline is rare and this research study plays a pivotal role in attempting to fill the knowledge gap of tourism in Brunei. It is the first study to be undertaken to elicit community tourism perceptions and tourism stakeholder views and thus confirming social representations of this fledgling industry.

This research has contributed significantly by consolidating the different and vast information to provide a generalised collection of data thus rendering it valuable for future research. Tourism planners, professionals and analysts will be able to identify the benefits and disbenefits of their proposed plans for the community and general industry as a whole and to strategise accordingly to maximise the benefits.

The valuable findings of the data have outlined various significant issues for future reference that have direct impact of the communities and key stakeholders of tourism. In view of these findings, the research recommends various points for consideration to serve as guidance only.

First and foremost, the critical issues in tourism must be addressed in a more holistic manner as opposed to current practices that inefficiently attempt to

research them in a superficial manner. This fledgling industry has massive teething problems and an agenda must be set for future research which will shed light on what tourism can do for Brunei.

The researcher believes that Brunei should attempt to introduce the concept of 'riadah' to increase its local tourism industry. The arab term 'riadah' means to exercise or undertake recreational activities. In Islam, this encompasses leisure time activities spent with the family and it is also considered as an act of worship. The family unit is important in Malay society whereby it is usual to find three generations living under the same roof. Hence preserving this unit is essential through activities that reinforce family ties such as going on family holidays.

The Ministry of Culture, Arts and Tourism (MCAT) in Malaysia capitalised this concept was used by to increase its domestic tourism industry in 2000 when the haze, the war in Iraq and terrorist attacks in Eastern Malaysia severely affected this industry. The MCAT started to promote the importance of 'raidah' and their target market was the family unit. The marketing slogan used during this period was 'Cuti-cuti Malaysia' (Holidays in Malaysia). Tourism was encourage by the MCAT was 'ibadat' (obligatory worship) thus it is compulsory on the Muslim community. This tactic aimed to address several socio-economic issues: to bring in local tourism revenue when foreign tourism receipts were down, to encourage more family unity and also to 'assist' in upholding the Islamic philosophy. This is an example, which Brunei should consider in boosting its weak domestic tourism industry.

With regards to Royal Brunei Airlines (RBA), the researcher believes that the new appointment of an external consultant in 2002 will help this failing airline immensely. RBA has a vast network of up to 21 destinations but the global effects of the SARS outbreak, relatively poor product and services, inefficient management practices and abuse of position (Borneo Bulletin, 9<sup>th</sup> May 2003) over an extended period of time has resulted in very severe profit losses. These losses have effectively erased two thirds of the national airline's equity.

Other geo-political forces have also contributed to exacerbating this very shaky business foundation. For example, the SARS outbreak has led to the Brunei government imposing strict restrictions on travel from infected countries. The recent threat of terrorism and war has also reduced global air-travel. These effects have a direct impact on Brunei tourism as the strategic plan before had focused on increasing tourists arrivals from the lower end of the market (e.g. Hong Kong and China). The researcher believes that despite all the current negative travel conditions, there are several windows of opportunity which the BTDU can take advantage of with careful strategic planning. This includes actively capturing the higher, more affluent Arab market to replace the loss in other international arrivals.

The researcher also considers the government's aim to create a business friendly environment under the 'SHuTT 2003' to be of marginal success. Under this plan, it was hoped that Brunei would become a 'service hub for trade and tourism'. The researcher believes that the current dismal global and local economic context has created too many operational issues and agendas which are not in sync with governmental aims and objectives. For example, the 'SHuTTT' plan requires the full cooperation of the national telecommunications agency. However, the recent privatisation of this service network has required many internal structural changes. They simply cannot hope to deliver the goods whilst these changes are occurring. The privatisation of this company was not even on the agenda when the 'SHuTT' plan was first formulated. The widespread massive mis-alignment of national goals cannot be rectified overnight. It will take many months, if not years to unravel governmental bureaucracy and inertia to overcome this problem. As much of the infrastructure has already been established, the government has no choice but to proceed with the plan. The researcher however believes that this plan is still achievable in the longer term.

As noted in the Tourism Masterplan 1998, the BTDU has insufficient and appropriately skilled staff to perform with efficient and effective competitiveness against other NTOs and thus position Brunei as a competitive and viable tourism destination. Even the staff themselves, most of whom have

no direct industry knowledge, have duly acknowledged this. The BTDU is a civil service department that follows all procedures related to the recruitment of public sector employees. The researcher believes that for this industry to become more vibrant, external tourism consultants must be enlisted to guide the BTDU. It therefore must become a quasi government agency with greater freedom and executive powers.

The researcher also found inappropriate the job rotation of the position of Head of the BTDU that occurs every two months amongst the officers. This has direct implications on the way in which the BTDU is managed. The researcher suspects that this job position rotation was carried out to prevent conflict amongst the more senior officers there. However, a negative outcome of such a practice is that the BTDU operates without clear and visible leadership at that particular level which can lead to greater confusion and conflict both within the BTDU and amongst the industry players themselves.

This gives evidence that the organisation of the BTDU itself has to be restructured for permanency to ensure that the officers are in a position to carry out their work to completion rather than have the task taken away in mid-way to be concluded by another officer. The researcher feels that this may benefit the organisation in the long run.

With regards to tourism education in Brunei, it is clearly seen that the student output from the training programmes falls short of industry requirements, as in many developing countries. The college is incapable of carrying the full responsibility of providing all the industry training needs in tourism. There is therefore a need for other institutions to fill this educational gap. This problem will be exacerbated as the number of students will increase in the very near future. In tandem there should be a focus on training future qualified and experienced instructors who have access to the necessary facilities and teaching material. The weak industry linkages must also be strengthened. The role of the private sector and modern technologies in the tourism industry in Brunei must be analysed to find areas where value-added links may be

created and sustained. This requires changes to create a positive perception of professionalism in Brunei

The researcher recommends that the relevant authorities reassess the current national tourism education and training strategy to accommodate future needs. Thus there is a need for close planning and co-ordination between the Brunei Tourism Board and the Ministry of Education. Another recommendation is to include tourism education at undergraduate level / at lower educational levels e.g. primary-secondary to ensure that all levels of education are aware of it. There should also be further agreements with other institutions to encourage regional learning for example in with Sabah and Sarawak. This will ensure that there is cross-fertilisation of learning and also to increase student's awareness in other work environments. This should not just be confined to exchange students but also to educators as well. The scope for developing closer collaboration between other countries that have different strengths and expertise in the hospitality and tourism sectors should be considered.

Furthermore, a national tourism training council should be established which can introduce other education programmes that will complement tourism e.g. arts and crafts training. Women will also continue to play an increasingly important role in tourism due to foreseeable increases in the number of economically-active females in the workplace. Between 1991 and 2001, a rise of 5.7% was noted from 67.6% to 70.6% in the participation of women in the labour force (Borneo Bulletin, March 18, 2003). This may have an impact on the direction of local tourism growth.

The researcher also recommends the formation of an official collective or association comprising of artisans and local craftsmen. This association should have bargaining powers and have control mechanisms that can standardise the quality and prices of local goods produced. This grouping will simultaneously offer its members both support and protection from unscrupulous market forces. They can also mobilise to attend trade and travel



exhibitions with the BTDU and perhaps offer apprenticeship programmes to ensure the art is rejuvenated and promoted through the younger generations.

Both cultural and ecotourism will have different outcomes for the impacted communities and stakeholders. They are both different products and are offered amongst different communities and areas within Brunei. The most developed tourist areas are in Bandar Seri Begawan and in Temburong. It is foreseeable that as in many other countries, it will become difficult to see generalised patterns of tourism development and impact accruing from its development within these affected areas because of the relatively short industry history.

These tourism impacts, encompassing technological, economic, social, political, environmental aspects cannot be analysed in isolation. Rather they must be seen as interlinked and intertwined events or trends which have domino effects on each other in multifaceted and far-reaching ways.

These impacts will invariably vary amongst the different stakeholders who make up the homogenous population of Brunei. Thus it is essential to gain an insight into the processes of tourism to investigate who actually benefits or loses out in this industry. The aim of tourism development is to benefit the community as a whole but the question is will the benefits outweigh the costs or vice-versa? If the latter occurs, what can be done to rectify the situation?

The issue of empowerment is both a gendered and political process. This ultimately means that some parties or individuals will be in higher positions of empowerment and in most cases, those who are marginalized and disempowered will be further undermined by those empowered. Community consciousness must be sharpened to ensure that they too are aware that they can be empowered to have legitimate control and ownership of tourism development in their areas.

The answer lies in creating trade-offs between one thing and another as tourism planners can never hope to have the ideal situation of maximized

tourism benefits and minimized dis-benefits. It is up to the planner and implementers of such strategies to ensure that there are contingent plans that fulfil the 3Cs criteria (comprehensive, coherent and critically focused) in minimizing the disbenefits or negative outcomes and impacts of tourism in Brunei.

As Brunei has a small population base, there is greater reason for community-based tourism planning and management. This will entail necessary changes within policy adoption and implementation, which have mechanisms and tools for increased interfacing and communication between the public sector, the public sector and the community itself.

It is expected that due to the nature of the government and the private sector in handling this industry, the researcher believes that any reports or recommendations conducted for the industry will meet a slow response. Perhaps one of the obstacles lies in the complexity of the industry itself. In dealing with any changes, there are many other things that must be evaluated in tandem. Thus the rate of policy adoption and implementation is slow.

For VBY 2001, it was hoped that the multiplier effect of tourism would be in the generation of 6,000 jobs for the job seekers in Brunei. The government realizes that to achieve such an aim require careful planning to ensure that there is a match between industry needs and standards of the job requirement to the skills of the workers in the labour force. There is also a need to familiarise the local workers to the private sector work environment and in the process reshape their attitudes and perception of this sector.

Thus the government has initiated various schemes to ensure that there is a match and also to alleviate the unemployment problem in Brunei. There are various job placement schemes organized and run by different government agencies. One such scheme is the Apprenticeship scheme, which is run by the Labour department. The Training Scheme on Industry and Information Communication as well as Training in the Hospitality and Tourism Industry is coordinated by the DEPD. However, these schemes have just been

introduced in the past three years so the overall success of these initiatives is yet to be determined.

However, the researcher also believes that for an international industry like tourism, there is scope for institutions to offer job-placements overseas. This may appear as a twinning course whereby the hospitality or tourism student spends time studying and working in both the local and other overseas institution to gain a much broader view of the industry.

The answer not only lies in developing a strong quality workforce to fuel this industry but also relates to the strengthening and enlargement of Brunei's private sector. The government is actively trying to nurture the development of local entrepreneurs. There are already a number of entrepreneurial development programs offered by various agencies across the government. The Ministry of Industry and Primary Resources offers this scheme through its Resource and Standard Center, the Universiti Brunei Darussalam has an Entrepreneurial Development Unit, the Ministry of Youth and Sports assists this aim through its Youth Development Centre and the Department of Technical Education offers it through its Entrepreneurial Training Programs.

Financial assistance is also given to support the local entrepreneurs through financial schemes such as the Working Capital Credit Fund Micro-Credit and Financial Facilities Scheme for Industries. This holistic provision of support for the budding entrepreneurs is important because within the period of the Eighth National Development Plan, it is expected that 18,000 jobs will be created mostly in the wholesale and retail trade, followed by the hotels and restaurants industry, followed by the construction sector and finally in the storage and communications sector.

However, to achieve this requires simultaneous changes in the mindset of the locals. They must see tourism as a viable industry. The tourism entrepreneurial spirit must be instilled and actively nurtured amongst the locals. The researcher hopes that many more of Brunei's youth, diploma holders and graduates will explore the opportunities to become an 'employer'

rather than an 'employee' of a tourism-related service provider. The local employers in the private sector must also give preference to the local job seekers who are equipped with the right skills and abilities for the job. The private sector employers must also provide an environment whereby the locals are given supportive working conditions as well as skills development opportunities to further enhance their career prospects and job performances.

The researcher recommends that tourism planners in Brunei give serious consideration towards the development of more sustainable tourism development because this is clearly lacking in Brunei. This extends beyond paying the traditional lip-service to the industry players, the media, the communities and other interest groups. This means clear and concise action which is not limited to producing an environmentally friendly ecotourism product, or to its continuous upgrade and product extension of this range, but to ensuring that there is greater industry-wide concerted and conscious effort to become more resource friendly and cognizant.

The issue here is that Brunei is placing great emphasis on its development as an economic tool for diversification from oil and gas. However, one must be mindful of the serious negative social, cultural, moral and ethical impacts of the cost of tourism. These are sometimes overlooked by eager tourism planners and implementers who drive the economic 'card' through the government channels because of the potential for great monetary rewards.

The geo-political external events globally are decisive change agents of this industry. Brunei as a host destination cannot control tourism development effectively because these factors encroach on this industry infinitely.

Unlike in many developed nations, the powers of tourism and hospitality industry parties (such as the national airlines, foreign investors, tour operators, hoteliers) are limited. Undoubtedly, these parties would like to have greater say in this industry to their benefit but the Brunei context lies more in government's favour. Thus, for better or worse, the heavy hand of the government will continue to shape the direction of industry growth.

The multi-faceted nature of this industry means that the government cannot hope to develop this industry in seclusion. As noted earlier, the Australian Board recognizes over thirty separate industries, which make up the tourism industry as a whole. Thus all tourism planners must realize that in tandem with developing the industry's growth, other socio-economic aspects of development must also be incorporated and addressed within the holistic tourism master-plan or strategy. They should not assess this industry in isolation but should also consider other related industries as well. Failure to do so will constantly impede the growth and success of tourism in Brunei. It is this failure to manage properly and plan in a systematic manner that has led to 'wishy-washy' or 'indecisive' policy direction and incomprehensive development strategies, which is the root cause of the failure of VBY 2001.

### **8.5 Conclusion**

Tourism strategic management is an on-going process. Tourism management as a process has to be adaptable and pro-active to be able to create the much pursued market competitiveness within the international arena. Unlike in many developed nations, the powers of tourism and hospitality industry parties (such as the national airlines, foreign investors, tour operators, hoteliers) are limited. Undoubtedly, these parties would like to have greater say and will in this industry to their benefit but the Brunei context lies more in government's favour. Thus, for better or worse, the heavy hand of the government will continue to shape the direction of industry growth.

Brunei's own particular political environment is guided by its MIB principles. Laws, policies, regulations and controls are MIB-tinged. Yet there is a widespread inertia and problem in implementing and enforcing these policies. This practice stretches into the private sector. Thus the inefficient and ineffective policy, rules, regulations and law enforcement of tourism related agendas imply a gloomier picture for tourism in Brunei unless serious change and remedial tactics are carried out in the near future. All these must be addressed if the government and industry players hope to gain from sustainable tourism development planning.

Bruneian tourism must go beyond the micro level but actively address this complex industry at macro level. Brunei is a member of many associations such as BIMP-EAGA and ASEAN but its neighbours are more aggressive and competitive in this field. The regional tourism associations are designed to approach regional tourism issues in an integrated manner. This is where Brunei can benefit. Her competitors have been able to address macro-level issues in tourism in a more integrated and holistic approach and Brunei can learn to do so in a similar manner.

Both cultural and ecotourism will have different outcomes for the impacted communities and stakeholders. They are both different products and are offered amongst different communities and areas within Brunei. The most developed tourist areas are in Bandar Seri Begawan and in Temburong. It is foreseeable that as in many other countries, it will become difficult to see generalised patterns of tourism development and impacts accruing from its development within these particular areas because of the relatively short industry history. These tourism impacts, encompassing technological, economic, social, political, environmental aspects cannot be analysed in isolation. Rather they must be seen as interlinked and intertwined events or trends, which have domino effects on each other in multifaceted and far-reaching ways.

These impacts will invariably vary amongst the different stakeholders who make up the homogeneous population of Brunei. Thus it is essential to gain an insight into the processes of tourism to investigate who actually benefits or loses out in this industry. The aim of tourism development is to benefit the community as a whole but the question is will the benefits outweigh the costs or vice-versa? If the latter occurs, what can be done to rectify the situation?

The issue of empowerment is both a gendered and political process. This ultimately means that some parties or individuals will be in higher positions of empowerment and in most cases, those who are marginalized and disempowered will be further undermined by those empowered. Community consciousness must be sharpened to ensure that they too are aware that they

can be empowered to have legitimate control and ownership of tourism development in their areas.

As Brunei has a small population base, there is greater reason for community-based tourism planning and management. This will entail necessary changes within policy adoption and implementation that have mechanisms and tools for increased interfacing and communication between the public sector, the public sector and the community itself.

It is expected that due to the nature of the government and the private sector in handling this industry, the researcher believes that any reports or recommendations conducted for the industry will meet a slow response. Perhaps one of the obstacles lies in the complexity of the industry itself. In dealing with any changes, there are many other things which must be evaluated in tandem. Thus the rate of policy adoption and implementation is slow.

It is easy to attempt to identify the host destination's tourism life-cycle within the destination life-cycle models available. However, in Brunei's case, one cannot put this case neatly within its categories and compartmentalize it for future reference. Brunei's complex situation and its difficult development cannot be predicted reliably or accurately. There are too many contingent factors that have led to unplanned growth and development that has not been monitored properly. This industry appears to be all at once, matured, saturated and in its infancy stages. To many, it seems as if the industry has already reached its peak and is declining, whereas to others, it is at the point of rejuvenation provided drastic government changes are made.

With regards to women as a valid stakeholder group and gendered tourism, one begs to ask the question: are the experiences which the researcher has found in the Bruneian context the same or similar to those experienced by other women in the Islamic worlds? One wonders as to the challenges of the Muslim women in participating in this industry effectively and efficiently. The researcher believes that there should be equal rights in tourism development

and planning at all stages. The female voice must be heard and their participation must not be limited to domesticated roles of chambermaids and neither should they be limited to the lower rank or any organization. Their participation should be actively rewarded and encouraged as opposed to being marginalized.

Hence the government needs to implement greater gender sensitive tourism management. The women must also have the unequivocal support of men in enabling this to happen. This balance of power is difficult to achieve in Brunei bearing in mind the centuries of paternalistic and masculine traditions and cultural values. Women can benefit greatly from tourism activities but their participation will be even more restricted and perhaps lead to other problems if the men feel excluded from such activities (Ashley and LaFranchi, 1997).

This will create male opposition against female participation in tourism development. The men must therefore be educated in tandem to be more flexible and tolerant towards female tourism participation. There must also be a proactive attitude towards searching for and allowing women's associations into the tourism development processes. Where possible, the researcher suggests that women's consultative councils with strong endorsement from the government should be established.

As illustrated manifold around the world amongst host destinations, there are definitional issues involved because different stakeholders have individual philosophies which contribute to how they approach and practise tourism. Different actors can view the same thing from the same viewpoint and still reach different conclusions. This is the intricacy of tourism: multi-players and multi-perceptions. It was learnt that it is important for the country's tourism industry to live up to the expectations of tourists, which includes the delivery of quality services. The government has reiterated that tourism is private sector driven and hence the private sector needs to play a pro-active role to lure tourists into the country. The government would mainly act as the facilitator.



The author draws on crisis management theory ('t Hart, Rosenthal and Kouzmin, 1993) that suggests that in the light of recent world events, which have negatively affected global tourism, Brunei should apply both short-term and long-term strategic responses to overcome its lack of tourist arrivals. The threat of terrorism, airplane disasters, political unrest and war are examples of crises affecting this industry that compels tourism practitioners to address the "need to explore long-term consequences even though the situation at hand may seem to ask exclusively for immediate short-term action" ('t Hart, Rosenthal and Kouzmin, 1993, p.5). However, behind all this should be a firm affirmation in the MIB concept and to continue maintaining and reinforcing this system for future generations.

Malay Islamic values (derived from the MIB concept) have a deep impact on the research itself in terms of perspectives as this concept has always been the main 'driver' in shaping and directing our Bruneian culture and society, and thus must be addressed in any studies into Brunei. The MIB concept promotes a peaceful way of life and in this sense it can help to create a more peaceful tourism experience for both host and tourists provided both parties understand the foundations of peaceful and meaningful exchange. As noted in the study, the issue of equity and equal benefit between host and guests leaves ample scope for 'justice tourism' (Scheyvens, 2002) where each party is not exploited but achieves mutual learning from each other. The country has a right to welcome visitors but in exchange they must respect the MIB principles and this entails understanding its values. Tourism development is for the country, for the people, for future generations. It is not for anybody else.

The researcher honestly believes in upholding and respecting the MIB concept which to many is a novel concept *provided* that Bruneians know how to demonstrate its esteemed or perhaps 'yet to be discovered' values. It should be clear to every individual in Brunei irrespective of race, religion, colour or where they come from. Hopefully, this will produce the ones, which the country desperately needs for national development including the national tourism industry.

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Section B: Perceptions on tourism development and planning in Brunei from political and economic aspects.						Do not write in column
	<u>Agree Strongly</u>	<u>Agree</u>	<u>No opinion</u>	<u>Disagree</u>	<u>Disagree strongly</u>	
1. I consider tourism as an important economic activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
2. Tourism development contributes towards:						2a.
a) Job creation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
b) Gross national product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2b. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
c) Foreign exchange earnings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2c. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
d) Foreign direct investment into Brunei	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2d. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
e) My personal income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2e. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
3. I think tourism is a viable industry in Brunei.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
4. Tourism will be a sustainable industry in Brunei.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
5. I support the government's role and efforts in developing tourism.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
6. I believe the government has the ability to conduct long-range planning to overcome environmental impacts associated with tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
7. I think the government is sensitive to the needs of the community with regards to tourism development and planning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
8. Tourism development must be controlled and should be monitored.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
9. All restrictions to tourism development must be removed to develop this industry.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5

Section B: Perceptions on tourism development and planning in Brunei from political and economic aspects.						Do not write in column
	<u>Agree Strongly</u>	<u>Agree</u>	<u>No opinion</u>	<u>Disagree</u>	<u>Disagree strongly</u>	
10. I believe the actions of government and elected/appointed officials are consistent with resident desires.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
11. I believe that the appropriate policies and development options for tourism in the context of indigenous peoples in Brunei has been correctly identified.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
12. MIB in governance will have a strong effect on the manner in which tourism is developed and planned in this country.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
13. I believe that the presence of multinational companies in Brunei should be encouraged, as it will help to promote the tourism industry.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
14. I am concerned that the economic gains that Brunei should enjoy may go to others such as foreign service providers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
15. I am concerned that non-vendors in Brunei will benefit the most from tourist revenue.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
16. Tourist attractions are adequate for current visitor arrivals in Brunei to generate sufficient profit.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
17. Hospitality facilities are adequate for current visitor arrivals in Brunei to generate sufficient profit.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	17. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5

Section C: Perceptions on tourism development and planning in Brunei from the socio-cultural aspect.						Do not write in column
	<u>Agree Strongly</u>	<u>Agree</u>	<u>No opinion</u>	<u>Disagree</u>	<u>Disagree strongly</u>	
1. I support tourism development in my community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
2. I believe the community supports tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
3. I feel that I have a right to be consulted in tourism development in Brunei.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
4. I am happy with the way my community is planning for tourism.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5

Section C: Perceptions on tourism development and planning in Brunei from the socio-cultural aspect.						Do not write in column
	<u>Agree Strongly</u>	<u>Agree</u>	<u>No opinion</u>	<u>Disagree</u>	<u>Disagree strongly</u>	
5. The people of Brunei have received adequate education with regards to:						5a. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
a) The benefits of tourism.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
b) The negative aspects of tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5b. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
6. I believe that tourism development increases the quality of life in an area.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
7. Tourism will perpetuate the master/servant relationship between tourists and the host nation (Brunei).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
8. The indigenous group itself should control tourism in Brunei with an indigenous theme.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
9. Tourism bodies should exert a high degree of control over culture to prevent loss of cultural identification amongst Brunei's youth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
10. I am willing to invest my talent or time to make Brunei a great tourist destination.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
11. Tourism will enable cross-cultural exchange to be conducted between indigenous and non-indigenous people in Brunei.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
12. Better distribution of the benefits of tourism will be achieved through community involvement in tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
13. Representations of Brunei's traditional lifestyle will become staged and inauthentic in this industry.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
14. The high number of foreign workers working in this industry will limit tourist contact with locals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5

Section C: Perceptions on tourism development and planning in Brunei from the socio-cultural aspect.						Do not write in column
	<u>Agree Strongly</u>	<u>Agree</u>	<u>No opinion</u>	<u>Disagree</u>	<u>Disagree strongly</u>	
15. Tourism development will increase negative socio-cultural aspects such as:						15a.
a) Crime rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
b) Drug abuse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15b.
c) Alcohol consumption	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
d) Prostitution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15c.
e) Environmental degradation especially when they outnumber residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
16. Brunei's cultural heritage will become diluted because of increased foreign influence and presence in Brunei.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15d.
17. Tourism will lead to cultural rejuvenation and interest in traditional Brunei-Malay lifestyle, culture and arts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
18. I believe that tourist movement should be limited to certain areas only to preserve our natural environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15e.
19. The adoption of new cultural patterns will lead to loss of traditional Malay culture and dignity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
20. The national philosophy of MIB will not be affected by tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16.
						<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
						17.
						<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
						18.
						<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
						19.
						<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
						20.
						<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5

Section D: Perceptions on tourism development and planning in Brunei from the technological perspective.						Do not write in column
	Agree Strongly	Agree	No opinion	Disagree	Disagree strongly	
1. Local Bruneians should be more actively involved in tourism business activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
2. The number of trained locals in this industry is adequate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
3. The number of service-training institutions in Brunei is adequate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
4. There is lack of tourism planning expertise in Brunei.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
5. There is a lack of tourism co-ordination and communication between the private sector and local authorities in Brunei.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
6. There are insufficient human resources to fully develop the industry in Brunei.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
7. Technical expertise should be made available to help local Bruneians to develop skills to become involved in tourism management and development of tourism.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
8. There must be greater provision for tourism education courses for locals by both private and public sectors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5
9. Men are more suited to work in this industry than women are.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 5

Section E: Personal details		Do not write in column
1. Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	1. <input type="checkbox"/> <input type="checkbox"/> 1 2
2. What category is your age?	<input type="checkbox"/> 18- 25 years <input type="checkbox"/> 35-44 years <input type="checkbox"/> 55-64 years <input type="checkbox"/> 25-34 years <input type="checkbox"/> 45-54 years <input type="checkbox"/> Over 65 years	2. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 4 5 6
3. What is your ethnic group?	<input type="checkbox"/> Malay <input type="checkbox"/> Indian <input type="checkbox"/> Chinese <input type="checkbox"/> Other. Please specify _____	3. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4
4. In which district do you currently live in?	<input type="checkbox"/> Brunei-Muara <input type="checkbox"/> Temburong <input type="checkbox"/> Belait <input type="checkbox"/> Tutong	4. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4
5. How long have you been living in your current district?	<input type="checkbox"/> 1-5 years <input type="checkbox"/> 11-15 years <input type="checkbox"/> 21-25 years <input type="checkbox"/> Over 30 years <input type="checkbox"/> 6-10 years <input type="checkbox"/> 16-20 years <input type="checkbox"/> 25-30 years <input type="checkbox"/> All my life	5. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 1 2 3 4 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 5 6 7 8
6. What is your education level?	<input type="checkbox"/> Below Secondary 3 level <input type="checkbox"/> Degree level <input type="checkbox"/> Secondary 3 level to 6 <input type="checkbox"/> Postgraduate degree level	6. <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4

[illegible]

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