

Dubai



Singapore

A Comparative Analysis

By Faten Alshammari and Philip Tubb

Contents

[01 Introduction 3](#_Toc294449352)

[01.1 Singapore 3](#_Toc294449353)

[01.2 Dubai 4](#_Toc294449354)

[02 Ability to host events (Transport, infrastructure, accommodation, venues, events calendar) 4](#_Toc294449355)

[02.1 Singapore Tourism and Events Capabilities (Infrastructure) 4](#_Toc294449356)

[02.2 Dubai Tourism and Events Capabilities (Infrastructure) 5](#_Toc294449357)

[03 Security, risk and crisis management 6](#_Toc294449358)

[03.1 Singapore Security and Risk Management 7](#_Toc294449359)

[03.2 Dubai: Security and Risk Management 7](#_Toc294449360)

[04 Tourism Statistics and Tourism Trends 7](#_Toc294449361)

[04.1 Singapore: Statistics and Trends 8](#_Toc294449362)

[04.2 Dubai: Statistics and Trends 8](#_Toc294449363)

[05 Marketing the Destination 9](#_Toc294449364)

[05.1 Marketing Singapore 9](#_Toc294449365)

[05.2 Marketing Dubai 10](#_Toc294449366)

[06 Demographics and Labour Market 11](#_Toc294449367)

[06.1 Demographics and Labour Market Singapore 11](#_Toc294449368)

[06.2 Demographics and Labour Market Dubai 11](#_Toc294449369)

[07 Tourism and Events Strategies 12](#_Toc294449370)

[07.1 Tourism and Events Strategies Singapore 12](#_Toc294449371)

[07.1 Tourism and Events Strategies: Dubai 13](#_Toc294449372)

[08 Role of relevant tourism organisation 14](#_Toc294449373)

[08.1 Singapore Tourism Board 14](#_Toc294449374)

[08.2 Department of Tourism and Commerce Marketing (Dubai) 15](#_Toc294449375)

[09.1 Future strategies for Singapore 15](#_Toc294449376)

[09.2 Future strategies for Dubai 16](#_Toc294449377)

[References 17](#_Toc294449378)

[Image References 26](#_Toc294449379)

# 01 Introduction

Global tourism has grown from 25 million arrivals to 940 million between 1950 and 2010 and contributes about US$ 919 billion in export earnings, accounted for about 5% of the world’s economy and provided 6-7% of employment. (UNWTO 2011) Tourism is often linked to socio- economic development and can also be a source of much needed foreign exchange (Lohman et.al 2009, UNWTO2011, Ser et al 2002).

Dubai and Singapore both vigorously pursue tourism development policies as a means towards socio-economic development and part of their focus has also included the high yield Meetings Incentives Conferences and Events (MICE) market, (DCB 2011, Kovalski 2005, STB 2011, Iswaran, 2011, (Vericos 2007).

For a destination to be successful in tourism and MICE sector provision there are a variety of preconditions the destination must meet (Haven-Tang, et al 2007 Henderson 2006, Mac Lauren & Leong 2000).

This paper attempts to look at the two destinations and their tourism systems and offer an analysis of the two destination’s relative abilities in relation to these criteria.

## 01.1 Singapore

The Republic of Singapore is made up of the main island of Singapore and 55 smaller islands covering just 660 square kilometres, (Henderson 2006), with a population of just over 5 million it is one of the most densely populated and urbanised countries in the world (Singapore Statistics 2011).

It has one of the highest standards of living in Asia, (Kahn 1999) and tourism generates S$18.4 Billion and employs 7% of the population or 1 in 17 jobs (World Tourism Council 2009).

## 01.2 Dubai

Dubai is located in the United Arab Emirates and may be seen as an attractive tourist destination for leisure travellers as well as being a good location for events. Dubai has risen from 58th to 51st in the ICCA rankings from 2009 to 2010 (Dubai Convention Bureau 2011) (Singapore is ranked as number 5, ICCA 2011)). Please see Appendix 01 Located on the Persian Gulf, it possesses an attractive combination of hot climate and access to water activities, and offers high standards of hospitality that can compete with and even exceed hospitality industries in western countries. Its diverse landscape and experiences allows it to be promoted as an holistic destination (Ghosh 2011).

# 02 Ability to host events (Transport, infrastructure, accommodation, venues, events calendar)

The tourism success of a destination is dependent on its ability to provide a variety of infrastructure including accommodation and amenities, a reasonable level of security and a host community able to offer the various hospitality and other services required. (Haven-Tang, et al 2007, Henderson 2006, Mac Lauren & Leong 2000), and according to Lohman et al, (2008 p.205) “...transport infrastructure is a prerequisite for receiving, accommodating and processing visitors, and a well-designed infrastructure can be the basis for the development of a tourism destination”.

## 02.1 Singapore Tourism and Events Capabilities (Infrastructure)

Singapore is recognised as one of the leading destinations for meetings, exhibitions and events and festivals in Asia and the world (Donough –Tan, 2011, Kumar 2009, Thorton 2008, Lerwill 2008). For meetings in 2009 Singapore as a city was rated the most successful in the world (Fisher 2009) (Please see Appendix 02) Tan (2011) agrees, “...a pro-business environment, top-notch and efficient infrastructure, Singapore has also reinvented itself through the development of iconic projects such as its integrated resorts and repositioned itself as a transformed business destination.”

The quality of Singapore’s Changi Airport the recipient of 25 Best Airport awards in 2010. (Changi Airport 2011) “...and was World’s Best Airport in the 2010 Skytrax survey reinforces Singapore’s tourism credentials. It caters for 100 airlines with services to 200 cities and processed 42000000 passengers in 2010 (Changi Airport 2011). Its recent redevelopment has also strengthened Singapore’s image. (Kurosawa 2011, Eggleton 2011)

Likewise Singapore Airlines is one of the most successful in the world and reinforces Singapore’s ability to be a regional transport hub of significance, (Lohmann et al 2009, Henderson 2006, and Weaver & Laughton 2006).

MICE infrastructure includes the Suntec Centre and the Singapore World Trade Centre both located in the centre of the city, close to transport, accommodation and hospitality facilities. (Kon 2002) Several hotels also have the ability to hold conventions in house. (yoursingapore.com 2011)

Singapore has also developed an extensive events calendar including the only night Formula One race in the world and incorporating a wide variety of arts and cultural festivals throughout the year. (Please see Appendix 03, Singapore Events and Festivals Calendar)

## 02.2 Dubai Tourism and Events Capabilities (Infrastructure)

Dubai is located at the crossroads between Europe, Africa and Asia, it is also relatively easy to reach from Australasia, and is supported by a major international airport making it accessible (Dubai Convention Bureau 2011). Dubai also boasts Emirates Airlines, one of the most successful in the world. (Lohman et. al 2008)

There are a number of different facilities for events, the Dubai International Convention and Exhibition centre, a site of 90,000 square meters, providing extensive exhibition space. There are four hotels that have facilities suitable for accommodating conferences of up to 2000 attendees (Dubai Convention Bureau 2011). Arranging events can also be simplified through the Dubai Bid Alliance, aided by the Dubai Convention Bureau, where there is the potential for a bid for a full package, including preparation should rates, as well as harmonize terms and conditions (Dubai Convention Bureau 2011). The ability to cater for different tastes and needs is also facilitated, including cultural tourist attractions, sophisticated shopping facilities and a wide range of different culinary options, (DTCM 2011)

There is a comprehensive public transport system allowing travellers to move around, a metro rail system, as well as buses and water taxis, the latter of which is currently undergoing expansion (Government of Dubai 2011). Wojhati is an online journey planner facility that allows travellers to locate the most effective route for a joinery using different types of public transport (Government of Dubai 2011).

The hotel facilities include a wide range of accommodation to satisfy different tourism and budget needs, a sector that is increasing in size. In 2006 there were a total of 302 hotels with an average occupancy of 75.5% (AMEinfo, 2006). By 2008 this had increased to 352 hotels, as well as 188 hotel apartments (Department of Tourism Commerce Marketing 2009), cross various star ratings, including one hundred and four and five star hotels. There is also an extensive events calendar designed to strengthen its appeal as a destination. (Please see Appendix 4)

# 03 Security, risk and crisis management

Crises and disasters can directly and indirectly affect all levels of the tourism community and its operations (Santana et al. 2003). Additionally, tourists place a significant emphasis on safety when choosing destinations (Steene 2009, Young-Sun 2005), and according to Sonmez and Gaff 1998 p. 122, “Destinations perceived as safe will be considered and those considered as risky will be rejected.” Travel agents and operators will also avoid selling destinations that might be perceived by their customers as threatening, (Henderson 2003)

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## 03.1 Singapore Security and Risk Management

Singapore is recognised as a safe destination (Henderson 2006, Kon 2003) and according to Business Monitor International (2009), risks such as political instability and the likely hood of terrorist attack are very low and personal safety is rated as very high. (BMI 2009)

The Singapore government has developed strategies to deal with crises, security and terrorist events, the “Homefront Crisis Executive Group (HCEG) designed to provide “Whole of Government’’ response to such events. Together with the Homefront Crisis Ministerial Committee, they form the Homefront Crisis Management System, set up after the Sars outbreak in 2003 (Chan 2011).

## 03.2 Dubai: Security and Risk Management

Dubai is seen as one of the most stable countries in the United Arab Emirates, and the Middle East. Dubai is rated by Interpol rated as one of the worlds’ safest cities, making it an ideal destination for tourism and events (Dubai Convention Bureau 2011) However, In 2008 various Western governments issued travel advisories and for example the Australian Travel Advisory has not be adjusted since (Australian Government 2011), however, various security analysts refute the claim and point to the tight border security, stable regime and high standard of living as reasons that the threat is relatively low. (Elliott 2008, Starmer Smith 2008)

# 04 Tourism Statistics and Tourism Trends

According to the OECD, (2008), “The role of tourism statistics and tourism-related economic information is invaluable …more efficient policies can be developed at both national and local levels to support decision-making for business and policy.” Both Singapore and Dubai collect and collate extensive tourism data for the above purposes (STB 2011, DTCM 2011)

## 04.1 Singapore: Statistics and Trends

In Singapore the STB compiles comprehensive statistics completed at the points of entry by all visitors (Singapore Statistics 2011). It also receives statistics from Singapore’s gazetted hotels which comprise over 30700 hotel rooms. Singapore also maintains a Tourism Satellite Account and this is designed to measure the annual economic contribution of tourism to an economy (WTO 2008) In 2011 the direct contribution of Travel &Tourism to GDP is expected to be SGD12.1bn (3.9% of total GDP) in 2011, rising by 6.2% pa to SGD22.1bn (4.5%) by 2021 (in constant 2011 prices), (World Travel and Tourism Council 2011)

The key statistics for 2010 indicate that tourism in Singapore is recovering from the falls in both numbers and revenue experienced in 2008/9 due to the world economic crisis, (STB3 2010) and that the two integrated resorts have also had a significant impact (STB 2011). International visitor arrivals to Singapore reached 11.6 million in 2010, registering a Year-on-year increase of 20%.

The total of tourism receipts for 2010 were an estimated S$18.8 billion, this is an increase of 49% on 2009 due to higher per capita spend, increased arrivals and the opening of the two integrated resorts. (STB 2011)

Room revenue was estimated at S$1.9 billion increasing 28% over the previous year and average room rate increased by over 12% to S$212. Economy hotels had the greatest increase in revenue, 15% and the other hotel sectors experienced significant growth of between 6 and 9%. (STB 2011)

## 04.2 Dubai: Statistics and Trends

The global recession in 2008/9 has had a detrimental impact on the tourism industry, and when combined with the increased capacity of the hospitality industry, this indicates that there is a high level of capacity that can absorb increased demand for more tourists or events to be held. The average occupancy rate for hotels fell from 80.4% in 2008 to 70% in 2009 (Department of Tourism Commerce Marketing 2010). In the first nine months of 2010, there was a 6% increase from the same period for 2009, showing a slow but gradual increase in the hotel industry. The GDP contribution of tourism to Dubai’s economy is just under 20%. (Government of Dubai 2010), making it a very significant part of Dubai’s prosperity but also leaves it vulnerable to tourism shocks such as economic recession, disasters, pandemics or terrorism. (Henderson 2006)

However, room rates remain higher than 2008, the average room rate fall from $255 in 2009 to $320 in 2011, it is also expected that with the increasing capacity and the excess of supply over demand that the average room rate will fall further to $300 by the end of 2011. This indicates that the destination is not only one that has the capacity to absorb increases in demand, but one which may offer good value, given the over capacity and the falling hotel rates (Karen 2011). This level of value is likely to be seen for some time as the reports indicate that average room rates are not expected to return to their pre-2009 level for five years. With these price changes, it is not surprising that Dubai is also marketing itself as an interesting destination to appeal to budget conscious travellers (Foster 2011).

It is also expected that there will be an increasing level of differentiation between the city centre and the beach properties, with the latter reaching a rate double that of the city centre hotels. This may also indicate growth areas, and the way to gain best value when the prices do increase is to focus on the city centre locations. This is viable, given the effective and extensive public transportation system (Karen 2011).

# 05 Marketing the Destination

“To design and sell its tourism product, a destination needs to continuously

carry out marketing activities”, and for it to “take place both within a destination and on the tourism market.” (Radišić, 2010,p.768). Destination awareness is also essential for destination success in what has become a very competitive market place. (Henderson 2007)

## 05.1 Marketing Singapore

The marketing of Singapore has involved a variety of campaigns including extensive product development, with branding and promotion linked to overall strategies, (Henderson 2007, Chang & Lim 2004, and Yeoh 2002). Images and slogans such as Instant Asia, Surprising Singapore and New Asia Singapore culminated in Uniquely Singapore in 2006, (Henderson 2007) and evolved more recently into Your Singapore in 2009 (STB 2011) There has also been a widening of the traditional leisure markets to include medical and educational tourism, (Henderson 2003, STB 2011) The latest strategy now includes maximising internet and social media opportunities. (Bahkt 2010, STB 2011). It has also invested heavily in the development of two new integrated resorts, (STB 2011, Iswaran, 2011), further developed its events calendar, MICE infrastructure and a suite of new products while enhancing traditional products such as retailing, hotels and restaurants. (STB 2011, My Singapore 2011)

Future strategies include a plan to boost arrivals to 17 Million and receipts to $S30billion by promoting Singapore as a tourism hub, enhancing its already very successful conventions and exhibitions sector, further developing the leisure market and Singapore’s capabilities and image as a Service Centre. Another goal is to increase service quality, and expanding the resources of regional marketing offices to in emerging markets such as China and India. (Iswaran 2011, STB 2011)

## 05.2 Marketing Dubai

There is a high level of support for the industry and this importance is reflected by the considerable marketing support given to the industry. With nearly 6 million tourists attracted in the first nine months of 2010 the marketing appears to be having an impact. This is undertaken using strategic alliance with different travel suppliers. For example, the Dubai Department of Tourism and Commerce Marketing Board has announced that there will be a ‘kids go free’ offer, this includes an offer where children will get complimentary hotel accommodation for at least three nights and with a deal undertaken with Emirates Airline children up to two under 12 years of age will get half price air travel, when travelling with two full fare paying adults (Government of Dubai 2011). The Dubai Department of Tourism and Commerce has also organized a series of road shows, including five Indian Cities; this has been planned to continued in an extended form in 2011(Dev, 2011). Other promotions have included the Green Tourism Awards, which were first awarded in 2010, following a soft launch in 2009 (Government of Dubai 2011).

# 06 Demographics and Labour Market

While the attributes of a destination such as the natural or built attractions, culture and quality of infrastructure are very important to the success of a destination, it is argued that the key element for destination success largely the rests with quality of and service delivery of the people who work in tourism at the destination (Baum & Szivas, 2008). Tourism is labour intensive and destinations and businesses are distinguished from their competitors by their ability to offer superior service. Having the right staff, with the requisite skills is critical and offers considerable challenges given the lack of training, low pay and deceasing labour pools available to the industry (Haven-Tang & Jones 2008).

## 06.1 Demographics and Labour Market Singapore

The STB has recognised that a quality tourism workforce is necessary for Singapore to maintain and strengthen its position as a premier destination, (Leong et al 2002) and accordingly the STB has, “... actively developed training schemes and programmes to attract quality employees to the workforce, (Leong et al 2002, p.131). Further, “Tourism 21”, included the development of a variety of training programs and encouraged tourism businesses to develop their human resources capabilities (Leong et al 2002). In 2007 recognising that the new integrated resorts and other attractions, events and festivals will require a skilled work force the Singaporean government said it would invest $SG360 million to train 74,000 tourism workers and enhance the professionalism of the tourism industry (Adam 2007) More recently another initiative the Customer Centric Service Plan was instigated to encourage travel agencies in Singapore to improve their overall customer focus and customer service standards. (Singapore Government2 2011)

## 06.2 Demographics and Labour Market Dubai

The industry has sufficient labour to cope with increases and a well trained labour base currently serving the hospitality and tourism industry, with a strong education system and with a large number of migrant workers as well as nationals working in the industry, giving the industry a range of multicultural resources (Karen 2011).

The Department of Tourism and Commercial Marketing (DTCM) offers hospitality and tourism training and actively seeks training providers to ensure that the industry maintains a skilled and competent workforce.

# 07 Tourism and Events Strategies

According to Vlahović (2010), tourism destination strategy varies greatly and so there are many possible approaches that can be taken. Social, economic and environmental issues must be balanced with those of tourism development and they also need to develop effective destination strategies to competitively position the destination so that it has advantage over its rivals. A destination also has to position its products through developing positioning choices and so derive competitive advantage (**Sainaghi 2006).** Tourism events strategies are also developed for a variety of reasons to meet a range of diverse societal and strategic goals, (Getz 2007), and to realise events full tourism potential it has also come to be accepted that a destination needs to develop long term strategies for events and for their deep integration into overall tourism strategies (Menhdriritta 2007, Getz 2008)

## 07.1 Tourism and Events Strategies Singapore

Tourism is regarded as a valuable component of Singapore’s diversified economy (Henderson 2006) and is characterised by very interventionist policies developed by the Singapore Government and actioned through the Singapore Tourism Board (Yeo et al 2001, Low 1999, Wong 1997, Ooi 2002). Tourism is seen as complimentary to Singapore’s aspirations as a regional economic hub, bringing innovation, economic activity and stability, “…a world class tourist destination, a vibrant tourism business centre and a tourism hub gateway to Asia.” (Chang & Raguraman, 2004 p.47)

In the 1970’s the focus was on actively encouraging investment in infrastructure and developing hotels, garden style attractions and the resort island of Sentosa (STB 2011, Yeoh 2002).

The 1980’s saw a S$1 billion product development plan highlighting the conservation and enhancement of historic and cultural sites, (STB1, 2011, Yeoh et al 2001) The 1990’s saw Tourism Unlimited introducing the concept of packaging Singapore with regionally complimentary product and partnering with and investing in regional tourism development projects. (Yeoh et al 2002, Kon 2002, STB1 2011)

In the mid 1990’s STB acknowledged that tourism demand was changing, and the “Tourism 21, A Vision of a Tourism Capital” plan, was unveiled It highlighted enhancing Singapore’s appeal as a business and events destination and looked to further position Singapore as a regional hub a premier tourism business centre, the key tourism hub for the Asia Pacific Region and tourist destination in its own right (Low2 2002, Kon 2002, and Khoo 2001).

In 2009 “Your Singapore”, emphasised the concentration of offerings of culture, events and attractions and facilitated the leveraging of social media by allowing the customer the ability to customise their travel plans and experiences. A new website, significant investment into search engine marketing, blogger engagement, social media including monitoring, mobile and travel e-commerce (STB 2010)

Significant events management development has a variety of goals including fostering cultural diversity and racial harmony, for attracting tourists and creating an image of Singapore as an attractive place to work, do business and to recreate, (Henderson 2006, Kon 2002 & Yeoh et al 2001).

## 07.1 Tourism and Events Strategies: Dubai

As Dubai is located at the crossroads between Europe, Africa and Asia, and used this advantage to develop the air transport system strategy, and create a successful airline to bring in tourists. In addition, hosting an event such as two shopping festivals a year and others events may have a strong effect on the destination image and raises the awareness of destination image and recognises the host city as having a range of attractions. Moreover, efficient cooperating between tourism industries play an important impact to be Dubai’s image as a leading tourism and event destination of the world, by building a number of different facilities are suitable for tourists and hosting events. In addition, arranging events can also be simplified through the Dubai Bid Alliance, aided by the Dubai Convention Bureau, where there is the potential for a bid for a full package (Dubai Convention Bureau 2011).

# 08 Role of relevant tourism organisation

The role of tourism organisations within destinations can vary dramatically and can range from destination marketing, industry coordination and image making, through to facilitation and direct support such as product development and the facilitation of infrastructure, (Wang 2008).

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## 08.1 Singapore Tourism Board

The Singapore Tourism Board (STB) was established in 1964, “with a mission to promote tourism and establish Singapore as a destination with universal appeal”, (Kon 2002, p.31). The STB has had a tremendous challenge in marketing and developing tourism within a small highly urbanised city state within a region where it is surrounded by countries offering the key tourism draw cards of sun, sand and sea and a range of other natural and cultural resources (Low1, 2002). Yet it has been remarkably successful and has “...imaginatively and innovatively used its strategic location and infrastructure...its multi-ethnic culture mosaic inspiring an “instant” Asia, along with shopping based on free port status, gastronomy and some historical and cultural sites ..augmented by manmade feats”, (Low1 2002, p. 51), to great advantage.

In 2005 the STB was restructured into eight strategic divisions and further emphasis was centred on perceived growth markets such as India and China. (STB 2011)

The STB administers the Tourism Development Assistance Scheme and other initiatives designed to promote product development, ITC and human resources capability, (Singapore Government1 2011) It also has a broader role fulfilling economic, social and political policy agendas beyond that of tourism and creating positive views that help to attract investment and talented people and perhaps discourage residents from the desire to emigrate, (Henderson 2004).

## 08.2 Department of Tourism and Commerce Marketing (Dubai)

The Department of Tourism and Commerce Marketing (DTCM) is the core organisation that plays a vital role on tourism, and its mission is Dubai Commerce and Tourism Promotion Board. Sheikh Mohammed bin Rashid Al Maktoum is involved in this organisation, with a great number of contributors. This organisation plays a critical role in different area such as, marketing planning for the destination , administration, including licensing of hotels and apartments, travel agents, tour operators and others areas, and employees training with others tourism industry partners to ensure the quality experiences for visitors (Department of Tourism Commerce Marketing 2009).

## 09.1 Future strategies for Singapore

The influence of the state in the development of tourism in Singapore has been considerable. Government policies facilitated by the STB and other agencies have been instrumental in defining tourism as a major pillar of Singapore’s economic and social development and for the success of tourism in this very small city state (Henderson 2006, Kon 2002 & Yeoh et al 2001).

The Government and STB are championing tourism development within the context of the two integrated resorts and the planning of several more attractions and infrastructure projects (Iswraran 2010). Business Monitor International gives Singapore a very high rating for continued growth for the next five years (BMI 2011)

There is however the reality that tourism competition in Asia and worldwide is accelerating and this will require Singapore to be innovative and creative in securing tourism visitation in the longer term. Henderson (2006) cites Singapore’s weaknesses as a relatively narrow selection of attractions, the loss of heritage due to over development and very small geographic size limiting further development opportunities. There are also questions of the long term viability large scale artificial attractions.

## 09.2 Future strategies for Dubai

The Dubai adopted a range of strategic plans for 2015, that take account a various sectors. By 2015 economic sector plans are to adopt a free market economy, innovation and unique relationship with the private sector.

A social policy will protect cuture and hertige, improve education and heathcare sevices, and improve labour regulation. Finally infrastructure, land and enviroment will striv for sustainable development by poroecting natural resources, offering efficient engergy electricity and water to meet the growth needs, and maintain dubai as sustainable enviroment (Department of Tourism Commerce Marketing 2009).

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