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2009

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Publication Details

McKechnie, D. S., Grant, J., Sadeghi, H., Khan, L. & Taymaskhanov, Z. 2009, 'Casinos and Gambling in Dubai: finding common ground between polarized stakeholders', 3rd International Conference on Destination Branding and Marketing, Macau, SAR, China, pp. 1-13.

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CASINOS AND GAMBLING IN DUBAI: FINDING COMMON GROUND BETWEEN POLARIZED STAKEHOLDERS

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ABSTRACT

The likelihood that one day gambling and casinos may be allowed in Dubai has long been a subject of speculative conversation fueled by the rapid growth and development of the city-state. While it appears unlikely that such activities would be permitted any time soon – if at all – the question about stakeholder response does generate curiosity. In the case of Dubai, two segments who are arguably the most polarized and yet, the most likely to be impacted are tourists and the host people of the country – UAE Nationals. Thus, this research considers that the prospective tourists' needs and wants as visitors may potentially be counter to the host people's support and approval. With that in mind, this research sought to identify similarities and differences in the responses from each group. 400 self-administered surveys were distributed throughout urban Dubai – 200 to each respondent segment. The findings suggest that tourists have moderate viewpoints about the impact of gambling and casinos on Dubai society, tourism and economy. UAE Nationals appeared somewhat naïve but nevertheless, hold stronger, but not uncompromising, views about the idea of gaming establishments. Marketing efforts targeted to the UAE Nationals may educate, inform and ultimately gain support from this group. Both respondent segments agreed that if gambling and casinos were to be allowed, then they should be privately operated under government regulations. Limitations include that this study was based on a hypothetical scenario; the extent to which respondents considered that gambling and casinos would ever be permitted may have influenced results.

Keywords: destination, stakeholders, residents, culture, Dubai

INTRODUCTION

Competition for tourists and the accompanying revenue that they inject into an economy is becoming ever more intense (Morgan et al, 2002). It is not uncommon to find local, regional and national governments turning to tourism as one means of stimulating economic well-being through service business initiatives that cater to visitors. The emphasis on tourism is evident in developed countries as well as developing countries (Harrison, 2002).

Dubai burst on to the tourism scene at the end of the twentieth century. Within a few short years, tourism numbers were on target for 15 million visitors by 2010 and hotel developments were projecting 232 percent increase in available rooms (Grant et al, 2007). It appeared that Dubai had found the magic elixir for attracting tourists and would meet and exceed every target set. The 2008 financial downturn reached the small city-state even as the world was feeling the change in the global economy. Tourism numbers dropped, hotel occupancy percentages lowered and retail spending fell. Dubai, once hailed as a 'must-visit' destination, became non-distinguishable amongst the many other world tourist locales that were also trying to attract the ever decreasing demand.

With that in mind, this paper revisits data collected before the economic downturn when it appeared that Dubai would always meet its tourism targets. The study was based on the hypothetical

'what if' casinos were allowed in Dubai, what would be the tourists' and local residents' views about gambling being offered to attract visitors? Two objectives guided the research: (1) to what extent are gambling and casinos viewed as likely to influence the existing culture; and (2) to what extent are views held that gambling and casinos would benefit – or not - Dubai's tourism and/or Dubai's economy. The value of this study is supported by the earlier work of Anwar and Sohail (2004, p 162) who note that 'Very little is known about the behaviour of tourists in interaction with the events designed as a strategic tool for tourism marketing in the UAE'. Additionally, local people can add to a destination's brand and image as well as to the tourism experience for visitors. Yet, in Dubai's case, the culture and religion of the host people potentially conflicts with value-add if the tourist activity is considered to be sinful. Thus, this study addresses the need for more research into situations where cultural tensions may exist between tourist and resident stakeholders.

LITERATURE REVIEW

Marketing a place is both challenging and complex. By its very nature, a place is singular as well as multi-faceted (Hosany, Ekinci, Uysal, 2007; 2006). Hankinson (2005, p 25) describes places as '... holistic entities or nuclear products and as collections of contributory elements or individual services and facilities'. Additionally, visitor experiences are heterogenic given that each encounter will be unique to every person. Although consumption of place, whether whole or a single component, typically occurs in the tourists' domain, it is also possible that residents engage in activities in a manner similar to any visitor (Henderson, 2000). Thus, the market for a place can be segmented into many different consumer groups (Gonzalez and Bello, 2002; Morgan et al, 2002; Hankinson, 2005) including the consideration that residents can be a distinct category (Henderson, 2000; Eraqi, 2006).

Attracting tourists to a place

Branding, which was once the domain of consumer goods and commodities, has become a key tool for destination marketers (Caldwell and Freire, 2004; Hankinson, 2004). Notably, an important challenge has been tourists' perceptions about a place (Walmsley and Young, 1998; Trueman et al, 2004). To reach the market, promotion literature in its various forms has typically been the communication medium. The upside to these initiatives is positive awareness and increased likelihood that the target market will visit. The downside is that 'Distorted and inauthentic images are presented, shaped to suit tourists and the tourism industry which imposes its demands and exploits places and people ... [this is] especially evident in representations of the East for consumption by the West' (Henderson, 2000, p 38).

Recent research has identified lifestyle as an important feature that is increasingly becoming part of branding and communication efforts (Gonzalez and Bello, 2002). For example, a destination that uses celebrity status and conversational value as a means of differentiation reaches potential visitors through hearts and minds emotion as well as lifestyle and status statements (Morgan et al, 2002). In this context, image contributes to perception and to a favourable positioning that represents value-add over and above the destination's actual attributes and characteristics. The result is an emotional attachment or commitment to a place because it makes a personal statement beyond 'what can we do on holiday?' (Ibid, p 338) to answer 'who can we be on holiday?' (Ibid, p 338). Framed in another way, vacation destinations may indicate lifestyle and status similar to the way that fashion accessories make such impact statements now (Ibid, 2002).

The strength of this approach is that celebrity and conversation can offset 'product parity, substitutability and competition' (Morgan et al, 2002, p 336) because they are key differentiation elements. The emotional rush that comes from 'we were there' aspirations realized or 'wish you were here' postcard sentiments are value propositions that potentially sway decisions about destination choice. Alternately, if conversation about a destination shifts to the negative, then the celebrity status may still exist but for the wrong reasons. The risk, then, is that visitors talk about the destination but may not consider it in future vacation plans. Dubai is, arguably, a good example of celebrity status and conversation value driving tourist interest in the small city-state. However, it may currently be at risk for negative conversation gaining strength amongst UK travelers. Published statistics are suggesting that the arrest incidence is higher for UK visitors to the UAE than when they visit other countries (Not,

2009). Whether this information will impact UK visitors' decisions to travel to Dubai in future is as yet unknown.

Supporting research has shown that visitors' are influenced by the perceived behaviours they will experience rather than the destination attributes, either in whole or in part (Correia et al, 2007). This translates to a value assessment measured as a function of those perceptions. Marketers who understand this premise recognize that what a destination offers may be less important than the behaviours that visitors visualize. A conflict arises, however, if the destination emphasizes culture and heritage. Under such circumstances, tourism may not be 'appropriate' if the values sustained by the local residents and communities are not protected and perpetuated (Harrison, 2002). Thus, gambling tourism to Dubai may not be 'appropriate' if the city-state's cultural values are challenged or threatened.

Destination culture and politics

The cultural aspects of any destination cannot be ignored nor should they be underestimated. According to Harrison (2002, p 363) '... it could be said that any interpretive plan for tourism must first identify the support of the local community as a primary target market for influence and support of the coordinated plan. A supportive, enthusiastic local community is an essential and potent cultural marketing tool' (Ibid, p 363). Thus, local support for tourism initiatives increases the likelihood of success provided that the efforts do not infringe upon the cultural fabric that binds the community. Information dissemination about strategy and benefits is necessary if buy-in from stakeholders is to be achieved. In addition to culture, reconciling the politics of divergent interests can undermine marketing efforts (Morgan et al, 2002). The argument for overcoming these obstacles is long-term commitment rather than expect that short-term solutions will satisfy special interest groups within the local constituencies.

Gaming at the destination

Seminal research that focused on the adoption of gaming activities as a tourism tool to boost communities' resources looked at an eastern seaboard state in the U.S. (Pizam and Pokela, 1985) and at a mid-west U.S. state (Caneday and Zeiger, 1991). In the first instance, Pizam and Pokela (1985, p 163) found that the community generally welcomed the economic boost that a proposed casino was expected to bring but anticipated it '... would reduce the quality of their residential neighborhoods and completely alter the image of their town'. The Caneday and Zeiger (1991) study was conducted after gambling was re-introduced to the legendary small town of Deadwood, South Dakota. The results reflected respondents' views that the community had changed, for better or worse, from the gaming tourism. Geographically, it was felt that the impact from gaming establishments lessened as distance from the casinos increased. The reference given for areas not affected was parks, beaches and recreation facilities. Overall, the community valued the gaming tourism for the contribution that it made to the '... economy, employment opportunities, social structure, lifestyle and environment' (Ibid, p 48)

Residents as stakeholders

An important element of destination marketing is the recognition that residents are a key segment (Caneday and Zeiger, 1991; Gonzalez and Bello, 2002; Sharma and Dyer, 2009a; Sharma and Dyer, 2009b) with potentially distinctive views, similar or different, from tourists (Henderson, 2000; Eraqi, 2006). Early research that made the distinction was Pizam and Pokela (1985). Residents' views were noted as being generally accepting as long as a proposed casino's location in the community was 'not in my backyard'. Later, Caneday and Zeiger (1991) found that residents whose jobs relied on gaming tourism held significantly stronger viewpoints about casinos than those whose employment did not. More recently, Sharma & Dyer (2009a) described residents according to seven demographic variables in a study that examined perceptions about the impact of area tourism development. Residents' home location showed distinctive results. Those living in tourist areas considered the economic contribution to be positive and the social impact as negative. Those who lived at a distance from the tourist enclaves held the reverse views: negative economic contribution and positive social

impact. A continuation of that study (Sharma and Dyer, 2009b) found that those who received some form of economic benefit from tourism were more likely to be supportive of tourist activities than those that did not.

Henderson (2000) recognized the tourist-resident dichotomy in a project that explored awareness about Singapore's 'New Asia' marketing initiatives. Study results from the 253 respondents, (133 were residents and 120 were tourists), found that the image projected about the destination must be real as well as '... capture a genuine sense of the place and its people in order to be sustainable' (p 42). Then, consulting residents before marketing efforts are finalized is critical given that they must live the values that are being portrayed in promotion communications. Resident respondents in the Eraqi (2006) tourism customer satisfaction study were employed in Egypt's tourist businesses. The findings supported the need to consider residents as a distinctive stakeholder segment equal to tourists' importance.

Generally, then, the literature supports the view that residents are stakeholders in destination marketing activities. Additionally, their characteristics define them as an important segment, comparable to tourists, when needs and wants are considered.

METHODOLOGY

This study involved three focus groups as well as a self-administered survey. Focus group one identified issues that may concern residents and included participants selected by convenience. Focus group two sought the views about Dubai's attractiveness as a destination from those not indigenous to the country. Focus group three participants included nationals from the Gulf Cooperative Countries, e.g. Kuwait, Saudi Arabia, Oman, Qatar, Bahrain and United Arab Emirates, who were asked for their views about gambling and casinos in Dubai. Each session involved six to eight people. The gender split was weighted towards males for focus group one and three with an equal number of women to men participating in focus group two. Information learned from the focus groups, as well as knowledge learned from the literature search, was used to develop the questionnaire. The focus group discussions identified that two groups, tourists and UAE Nationals, would be key respondent segments for continuing the exploratory study.

The survey instrument format included three sections: demographics and one section for each of the objectives, with dichotomous and scale questions. Respondents were approached using a convenience sample drawn from various locations throughout urban Dubai. Before they were offered the clipboard holding the survey, they were asked if they were tourist or National. If they did not fit into either category, they were politely thanked for their interest but not given the questionnaire.

The data collection ended with 400 usable surveys; two hundred respondents in each group. The gender split was: tourists - 52 percent men, 48 percent women, and Nationals - 68 percent men, 32 percent women. An early dichotomous question on the survey qualified if respondents had ever gambled. Notably, making a distinction about gambling for money, gambling for prizes or visiting a casino to gamble was not addressed. Thus, the dichotomous question left the respondents to interpret what constitutes gambling behaviour. The question's broad scope provided opportunities for the UAE Nationals to answer and yet not to be embarrassed since gambling activities are frowned upon within their religious beliefs. Those who had gambled were: tourists - 42 percent and UAE Nationals - 29 percent.

FINDINGS

Objective 1 asked: to what extent are gambling and casinos viewed as likely to influence the existing culture? Within this objective, cultural factors included why people would gamble and/or visit casinos as well as disadvantages that may be incurred if such activities were present and available. Respondents were asked about the likely reasons that people gamble and/or visit casinos (see Table 1). Tourists answered: to have fun, 59 percent; for gambling, 44 percent; to make money, 33 percent. UAE Nationals' responses were: to have fun, 74 percent; for gambling, 61 percent; to make money, 63 percent. All results were chi-square significant at $p < .05$.

Table 1
OBJECTIVE 1 - INFLUENCE THE EXISTING CULTURE

Reasons people gamble: % 'yes' responses	Tourists	UAE Nationals
To have fun	59%	74%
To gamble	44%	61%
To make money	33%	63%
The likelihood that issues related to gambling/casino activities would increase: % 'yes' responses		
Increase gambling behaviours	44%	62%
Increase compulsive gambling incidents	36%	59%
Increase in losses of money & property	38%	49%
Increase in gambling-related crime	32%	46%

Further culture-related comments asked respondents' about four distinct issues that may be evident in the city-state's social fabric if gambling/casinos were permitted (see Table 1). Yes answers for the two respondent segments included: increase in gambling behaviours – tourists 44 percent, UAE Nationals 62 percent; increase in incidents of compulsive gambling – tourists 36 percent, UAE Nationals 59 percent; people in the population would suffer loss of money and property – tourists 38 percent, UAE Nationals 49 percent; and increase in crime related to gambling - tourists 32 percent, UAE Nationals 46 percent. All results were chi-square significant at $p < .05$.

Additional culture-related questions, which used a 5-point Likert scale, included general statements about religion; legalizing gambling and alcohol (see Table 2). Notably, the results for these statements were chi-square significant at $p < .05$. When asked about agreement with the statement: Islamic countries should not have a casino, tourists results were strongly agree, 24 percent; agree, 12 percent. UAE Nationals answered strongly agree, 31 percent; agree, 10 percent. UAE Nationals strongly disagreed, 30 percent compared to tourists at 15 percent. Whether to legalize gambling in casinos in the same manner that alcohol is legalized for sale in clubs and hotels was included in the scale questions. The answers from tourists were strongly agree, 15 percent; agree, 32 percent. UAE Nationals responses were strongly agree, 11 percent; agree, 12 percent. UAE Nationals strongly disagreed, 37 percent compared to tourists at 18 percent. Lastly, agreement with the statement, alcohol should not be available in a casino, indicated that tourists strongly agree, 27 percent and agree, 19 percent, while UAE Nationals strongly agree, 47 percent and agree, 14 percent. UAE Nationals strongly disagreed, 11 percent compared to tourists at 15 percent.

Objective 2 queried: to what extent are views held that gambling and casinos would benefit – or not - Dubai's tourism and/or Dubai's economy. A 5-point Likert scale for level of agreement enabled respondents to comment whether tourism and/or the economy would benefit (see Table 3). Results were chi-square significant at $p < .05$. Tourists supported the notion that gambling and casinos would be beneficial to tourism: strongly agree, 35 percent and agree 31 percent. UAE Nationals' views were strongly agree, 24 percent, agree, 16 percent. UAE Nationals strongly disagreed (33 percent) that tourism would benefit compared to tourists (10 percent). The statement that queried whether the economy would benefit had the following results: tourists strongly agree, 22 percent and agree, 31 percent while UAE Nationals strongly agree, 16 percent and agree, 12 percent. The Nationals strongly disagreed in greater numbers, 37 percent, than did tourists, 11 percent.

Table 2
 OBJECTIVE 1 – CULTURE-RELATED ISSUES AND CASINOS

		Tourists	UAE Nationals
Islamic countries should not have a casino	Strongly agree	24%	31%
	Agree	12%	10%
	Strongly disagree	15%	30%
Legalize gambling in casinos just as alcohol is legalized for sale in clubs and hotels	Strongly agree	15%	11%
	Agree	32%	12%
	Strongly disagree	18%	37%
Alcohol should not be available in casinos	Strongly agree	27%	47%
	Agree	19%	14%
	Strongly disagree	15%	11%

Table 3
 OBJECTIVE 2 – BENEFIT DUBAI TOURISM, DUBAI ECONOMY

		Tourists	UAE Nationals
Benefit tourism	Strongly agree	35%	24%
	Agree	31%	16%
	Strongly disagree	10%	33%
Benefit economy	Strongly agree	22%	16%
	Agree	31%	12%
	Strongly disagree	11%	37%

Respondents were asked their views about the preferred business structure should Dubai consent to gambling and casinos at some future date. Tourists answered: privately owned, 26 percent, government owned, 28 percent, privately owned with rules set by government, 44 percent. UAE Nationals said privately owned, 25 percent, government owned, 25 percent, privately owned with rules set by government, 50 percent. When asked if Dubai should have a casino, 55 percent of tourist respondents said yes compared to 28% of UAE Nationals, with chi-square significant at $p < .05$.

DISCUSSION

For objective one, UAE Nationals answered ‘yes’ for all question options compared to the responses from tourists. This may have been the result of their inexperience with gambling and casinos. Tourists, on the other hand, likely had some familiarity or had come into contact with gaming activities while on vacation to other destinations or in their home countries. This suggests some degree of naivety amongst UAE Nationals if their responses were truly the result of less exposure to gambling

and/or casinos. This is, arguably, substantiated by the high percentage who viewed making money as a reason that people gamble/visit casinos: the inexperienced may not be aware that the 'house' is typically favoured in most games of chance leaving amateur gamblers at a distinct disadvantage to increase their financial resources. Additionally, having fun drew the highest response from tourists. This suggests that in a holiday setting, this group is less likely to expect that they would leave a gaming establishment with more money than when they entered. This indicates that tourists view gambling while on vacation as another attraction to experience.

UAE Nationals were more likely than tourists to view gambling and casinos as a negative impact on culture when benchmarked against increasing incidents of various behaviours. To the UAE Nationals, gaming establishments represent a significant departure from the values that are embedded in the culture. On the other hand, tourists' responses may reflect previous exposure to gambling and casinos to the extent that they do not consider such activities to be distinct within a culture.

Responses to the statement about casinos in Islamic countries drew polarized views from the UAE Nationals. Almost the same percentage strongly agreed as did those who strongly disagreed. This was unexpected. It was anticipated that a much greater percentage would strongly disagree to casinos being established in countries that follow Islamic values. Legalizing gambling had little support amongst UAE Nationals as did mixing alcohol with gambling. These results suggest that UAE Nationals would not be tolerant of attempts to mix 'sin' activities if gambling and casinos were ever to be proposed.

Only 40 percent of the UAE Nationals who answered the survey viewed gambling and casinos as a benefit to tourism and only 28 percent considered that the gaming activities would add to the economy. This response to the economy may have been because business was thriving at the time of the study. If repeated now, when Dubai's financial situation is regular fodder for the world news media and journalists, the results may be different. Also surprising was the willingness of UAE Nationals to have casinos privately owned with rules set by government. However, the actual percentage that would support casinos in Dubai was low, 28 percent, which indicates that the government would have to be very convincing about the need for gaming establishments if they wanted public support. Tourists felt that tourism would benefit from gambling and casinos, 66 percent, while benefit to the economy had a slightly weaker show of support, 53 percent. These results were unexpected given that tourism and the economy were booming at the time of the data collection. Whether tourists felt that something was still missing from their Dubai vacation experience remains unknown.

Overall, these research findings suggest that if Dubai found itself in a position where tourism to the emirate was being competitively challenged and the economy needed a boost, then any thoughts about permitting gambling and casinos should consider both tourists' and UAE Nationals' views. In this exploratory study, tourists indicated that gaming establishments would be another attraction but not an integral element of a Dubai vacation. UAE Nationals were, as expected, reticent about gambling and casinos. However, there appears to be opportunities to influence their thinking, if the explanation is based on necessity and benefit. Thus, a marketing campaign targeted to the country's indigenous people may motivate needed support if ever the need arose. Certainly, marketing initiatives that target the two stakeholder groups, external and internal, would carry significant importance if gambling and casinos were ever to be adopted into the culture.

One limitation of the study was the difficulty distinguishing tourists and UAE Nationals from the general population during data collection. Western dress could not be a determining factor as residents and tourists dress alike with the only noticeable difference occurring in the winter months when tourists are most likely to be the people in shorts. Regarding Arab dress, many other nationalities, besides the indigenous people of the UAE, wear the women's abaya or the men's dishdasha. Another limitation was that the survey questions considered hypothetical scenarios and the extent to which respondents believe that Dubai would ever permit gambling and casinos may have impacted their answers. For instance, disbelief in a future where gambling and casinos operate in the emirate may have meant more lenient opinions being expressed. Lastly, this study was an exploratory 'what if' project. As a result, the information sought was basic and general. If the study were repeated, more detailed questions would add strength to the project.

CONCLUSION

At the time of this study, tourism was on the rise. The research began from a purely speculative 'what if' given that the UAE culture is based on the Muslim religion wherein gambling and casinos are sinful activities. Soon after completing data collection, the world markets began to fall. Recent figures showed that combined revenues within the Dubai tourism industry had declined by 15 percent in the 2009 Q1 (Tempting, 2009) with the typically slow Q2 season seeing only 4 percent growth (Billing, 2009) year over year.

The value of this study has been the contribution to the literature about the views held by two distinct stakeholder segments, particularly when the culture and religion of the host people potentially conflicts with the tourism activity. The findings suggest that tourists have moderate viewpoints about the impact of gambling and casinos on Dubai society, tourism and economy. UAE Nationals appeared somewhat naïve but nevertheless, hold stronger, but not uncompromising, views about the idea of gaming establishments. Marketing efforts targeted to the UAE Nationals may educate, inform and ultimately gain support from this group. Both respondent segments agreed that if gambling and casinos were to be allowed, then they should be privately operated under government regulations.

This exploratory study has potential for other emerging tourist destinations that may be faced with the need to redefine and/or reposition the brand and image. For Dubai, the challenge yet to come may be the need to integrate tourist values with its cultural and religious values if its destination celebrity status wanes.

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