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INTEGRATED RESORTS-
SINGAPORE’S ANSWER TO DESTINATION COMPETITIVENESS?

Thesis submitted by Lee Choong Hiong, Derrick, MBA, BSc

For the degree of Doctor of Philosophy

Tourism, College of Business, Law & Governance
James Cook University

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The research presented and reported in this thesis was conducted within the guidelines for research ethics outlined in the National Statement of Ethics Conduct in Research involving Humans (1999), the James Cook University Policy on Experimentation Ethics, Standard Practices and Guidelines (2001). The proposed research methodology received clearance from the James Cook University Experimentation Ethics Review Committee (Approval number H4440, H5359 and H5877).

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Statement of the Contribution of Others

I declare that this thesis is my own work but I acknowledge that the production of this thesis has benefitted significantly from the contribution of several others. Specifically, I acknowledge the tremendous assistance of Assoc. Prof. Laurie Murphy and Professor Philip Pearce in the supervision of the thesis and their contribution to the editing process.

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Abstract

Integrated resorts in the Singaporean context refer to a combination of entertainment, gambling and accommodation precincts providing a rich array of services to tourists on the one site. The principal objective of this thesis was to analyse the potential of the two large scale integrated resorts (IRs) in Singapore – Marina Bay Sands and Resorts World Sentosa - to provide a sustainable competitive advantage to the country as a tourism destination. Three specific factors were explored to achieve this broad objective: stakeholder perceptions of the Singapore Tourism Board's strategy to develop IRs as key drivers of Destination Singapore; tourist perceptions of the IRs and their contributions to Singapore's tourist appeal; and local residents' perceptions of the two IRs and their impacts on the community.

The first study involved face-to-face interviews with 40 stakeholders from seven key sectors, including government, hotels, travel agents, airlines, business associates, attractions, and food and beverage operators. The stakeholders were asked about four key areas: perceptions of IRs and their success; Singapore's new brand image as a destination; stakeholder involvement in the planning and implementation of the IRs; and their long term view of Singapore as a tourist destination. Firstly, the respondents perceived the IRs as a unique and competitive tourism product given the increase in tourist arrivals and higher tourism receipts annually since 2010, but they were also concerned with the social costs such as higher crime rates and bankruptcies that might be associated with their component of casino gambling. Secondly, the respondents agreed that the IRs boosted Singapore's image as a shopping and high-end tourism destination, however, they were unsure if promoting casino tourism would enhance the overall destination brand image of the city-state. The stakeholders reported only a marginal role in terms of their participation in planning the Singapore experiment in IR-led tourism development. Fourthly, and in the longer term, these respondents were concerned that if the government decides to issue additional licenses to new casino operators to enhance the appeal of Singapore as a gaming destination, such developments are believed to create more severe social problems. Findings from this study were consistent with the academic literature: successful tourism products should

improve destination competitiveness, and also seek to enhance or certainly not damage the social well-being of a community.

For Study 2 survey questionnaires were distributed to international visitors in Singapore to investigate tourist perceptions of the two IRs. A total of 469 respondents participated in the survey and identified the perceptions and attitudes of tourists including the perceptions of tourist attractions in Singapore, perceptions of IRs and Singapore's destination image, images of Singapore as a tourism destination, views concerning the brand personality of Singapore compared with other destinations, and perceptions of the likely tourism landscape of Singapore in 2025. Findings from the survey indicated that the tourists rated Orchard Road, Sentosa, and then equally Clarke Quay and Gardens by the Bay, as the leading tourism attractions. The majority of the respondents viewed the two IRs favourably as they agreed that Singapore is a more appealing tourism destination with the IRs, and also that their visits to the IRs were consistent with their expectations of a Singaporean tourism experience. The respondents considered that Singapore was as a modern, cosmopolitan and cultural tourism destination. They also indicated that Singapore would be an appealing tourism setting in 2025 if the city-state were to be promoted as a 'garden city-showcasing sustainable urban living'. It could be acknowledged that the brand identity and image have to be attractive as well as consistent with the perceived brand image of tourists.

Finally, it was important to seek the perceptions of the local residents, as the literature has revealed that community support is a key concern for sustainable tourism developments such as the two IRs. In Study 3 a total of 35 diverse local residents participated in four focus group sessions and shared their perceptions and attitudes about the following issues: the reasons why Singapore is now attracting more tourists (including Mainland Chinese tourists), the effectiveness of the IRs as the tourism strategy for Singapore, the impact of the IRs on social capital, the advantages and disadvantages of promoting a casino tourism strategy, the effectiveness of the safeguard measures introduced by the government to prevent addictive gambling and other social costs, and finally the preferred future tourism landscape of Singapore. Findings from the focus group studies revealed that the respondents indicated a predominantly positive social representation of the IRs. In brief, local residents saw the IRs as an appealing tourism product. There was a positive awareness of the increase in tourist arrivals, especially the Mainland Chinese market, boosting higher tourism receipts and taxation revenue, and a view that additional employment opportunities had occurred. Additional findings included the outcome that local residents distinguished between the appeal of the two IRs - Resorts World Sentosa (RWS) is more appealing to families and friends, whereas the Marina Bay Sands caters more to the business tourist markets.

Taken together, the findings of the studies revealed widespread support for the Singapore experiment in boosting tourism through the development of the current Integrated Resorts. Business and government personnel, tourists and the local residents were all in broad agreement about the positive outcomes. There remain, however, some common views that current IR development involving the casino part of their operations might be less desirable with potentially negative social consequences. There was some support for a preferred future for Singaporean tourism through embellishing its image as a sustainable garden city supported by multiple new forms of tourist attractions.

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Chapter Outline

The central aim of this thesis is to explore the role of Integrated Resorts (IRs) in the tourism development context of Singapore. The discussions commence with a review of the existing academic literature regarding integrated resorts, destination competitiveness, destination branding, and destination choice. This discussion also includes a review of the work on casino-based tourism carried out by other academic scholars. This is a review of the discussion on whether or not the addition of a casino-based tourism strategy is effective in promoting destinations, and is followed by a brief account of the historical circumstances facing Singapore's tourism industry, which was heavily affected by the global financial crisis in 2008. The development of tourism in Singapore after casino gambling was legalized in 2005 and after the two Integrated Resorts – Marina Bay Sands (MBS) and Resorts World Sentosa (RWS) were launched in 2010 is then considered. Singapore has recorded an exponential increase in tourist arrivals from 2010 to today, but questions remain about the future and the importance of the IR strategy in this growth.

1.1 Introduction

Integrated resorts in the Singaporean context refer to a combination of entertainment, gambling and accommodation precincts providing a rich array of services to tourists on the one site. This chapter provides an overview of Singapore's newest tourism initiative Integrated Resorts (IRs), which have been credited with contributing to the high growth in international tourist arrivals to 11.6 million visitors in late 2010 after they were introduced earlier in that year. This is in contrast to the decline in tourist arrivals of 6 per cent from 10.28 million in 2007 to 9.68 million in 2009. The lessening of the financial crisis 2008-2009 also helped the situation.

To more fully understand the impact of integrated resorts (IRs) on growth in a destination like that of Singapore, the nature of such resorts with respect to destination competitiveness, destination branding and destination choice should be reviewed. Destination competitiveness considers the factors required for enhancing the appeal of tourism destinations and more importantly, the economic prosperity of the local residents. The tourism industry in Singapore reached a new height with record high visitation numbers and tourism revenue shared among stakeholders – tour operators, hotels, restaurants and theme attractions - in 2010, shortly after the IRs were opened, and has continued to grow. However, it remains to be seen how much the casino tourism introduced in these resorts contributed to this growth, or whether it has also created new social problems such as addictive gambling, broken families, bankruptcies, crimes and social disruption in Singapore, as gambling can be regarded as an addictive behaviour. According to a report by Fitch Ratings, the casinos at Marina Bay Sands (MBS) and Resorts World Sentosa (RWS) are likely to have stagnant growth and a decline in gaming revenue in 2015 due mainly to macroeconomic and political factors in China, which is experiencing a slowdown in economic growth, and a recent crackdown on corruption and tightening restrictions on group travel. This has had a negative impact on the two casinos as their targeted VIP business consists primarily of Chinese gambling tourists who account for roughly half of total gaming revenue.

In the Singapore context, legalized casino gambling was introduced in 2005 as one attempt to attract more foreign tourists. Significant development in the casino industry is evident in other regional destinations emulating the two IRs which are perceived as successful tourism initiatives. New mega casino resorts have been announced that could threaten the long-term growth and profitability of Singapore casinos. For example, the Philippines is planning to launch three mega casino resorts by end-2015 and Macau is constructing several new major casino projects. Genting Singapore continued to expand its presence in Asia’s gaming industry with the ground-breaking of Resorts World Jeju (RWJ), South Korea in February 2015. RWJ is an integrated resort jointly developed by China’s Landing International Development and Genting Singapore, is five times bigger than RWS and it is expected to be completed in 2019 (ASIAONE, 2015). According to Transportation Minister Yeh Kuan-shih, Taiwan would have the first integrated resort in 2019 as US-based Weidner Resorts is proposing to build a NT$60 billion (US$2 billion) 100 hectare IR on the Matsu island of Beigan (HOTEL-ONLINE, 2013). Other destinations, including Japan, Sri Lanka, Vietnam, Cambodia, Australia, New Zealand and Russia are likely to open new casinos by 2020 (The Straits Times, 2015). These proposals raise the question of whether Casino/IR-based tourism development can provide a long term competitive advantage for Singapore as a tourism destination. It is important, therefore, to assess the casino arm of the IRs, both in terms of its economic benefit to Singapore as a tourist destination, and in relation to the possible impact of addictive gambling, its social contribution, but also to understand that this is but one part of the assessment of the importance of the IRs to Singapore.

Researchers argue that the concepts of destination branding and destination image are closely associated as both concepts are concerned with the perception of tourists. A destination's image, if perceived positively by tourists also enhances a destination's branding. This is of significant importance to the IRs as tourists' perceptions of Singapore as an attractive destination can motivate and boost international visitor arrivals, and the IR developments influence destination brand perceptions of Singapore. However, if visitors dislike gambling and view the concept of casino tourism negatively, this could create unfavourable perceptions of the IRs and of Singapore as a gaming destination. Understanding the motivation and decision making process of tourists are also relevant in influencing destination choice. It is useful to marketers to identify and understand how both the 'push' factors (internal motivation, outgoing personality) and 'pull' factors' (external appeal) can influence tourists' decisions to visit a destination.

1.2 The Current Situation

The Singaporean government aimed to reinvigorate its destination marketing strategy using the two new casino-based IRs as an attraction. The desired target was to boost international tourist arrivals (TA) to 17 million and tourism receipts (TR) to S$30 billion by 2015. Commentary on this target will be made subsequently. The main unique selling point of the two IRs is in providing all-in-one entertainment for both tourists and local residents. The US$4.32 billion (S$6.59 billion) Resorts World Sentosa (RWS), which officially opened on 20 January 2010, houses six hotels offering a total of 1,840 guest rooms, a casino capped at 15,000 square meters, Universal Studio theme park Singapore which features 24 attractions with 18 rides and a Marina Life Park, the world's largest oceanarium (RWS Company Information, 2010). The US$5.5 billion Marina Bay Sands (MBS) officially opened on 27 April 2010 and features three cascading 55-storey hotel towers topped by an extraordinary 1.2 hectare SkyPark, Art Science museum, renowned brands retail stores, theatres, nightclubs and a Las Vegas-style casino (MBS Company Information, 2010). When launched these two IRs were expected to create about 35,000 jobs, including 10,000 positions within the IRs themselves.

This strategic initiative paid dividends in terms of stronger tourism performance as evidenced by higher tourist arrivals, increased tourism expenditure, and growth in employment opportunities. According to the Singapore Tourism Board (STB), Singapore welcomed 11.6 million visitors in 2010, an increase of 20.2 per cent compared to 2009. Total employment also increased by 112,500, an increase of nearly three-fold compared to 37,600 in 2009. The bulk of employment gains came from the service industries which added 109,500 jobs, up from the increase of 55,600 in 2009. The service industries contributed 97.3 per cent, whereas construction employment gained a modest 2,300 and manufacturing employment declined by 2,700 compared to 2009 (Ministry of Manpower, 2011). Singapore continues to attract more visitors annually and attracted 15.5 million visitors in 2013, an increase of 60 per cent compared to 2009. STB's quest to increase visitor yield paid off as tourism receipts reached S$23.5 billion as per capita spending rose (ASIAONE, 2015; SBR, 2014a). Table 1 summarizes the visitor arrivals quoted in millions (M) to Singapore from 2009-2014. The percent change in year-to-year (Y-o-Y) terms is indicated.

Table 1 - Visitor arrivals to Singapore (2009- 2014) (millions)

Year	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Ttl**	**% YoY**
2009	0.7	0.6	0.7	0.7	0.7	0.7	0.8	0.8	0.7	0.8	0.8	0.9	9.6	*4.3*
2010	0.9	0.8	0.9	0.9	0.9	0.9	1.0	0.9	0.9	0.9	0.9	1.1	11.6	20.2
2011	1.0	0.9	1.0	1.1	1.0	1.0	1.2	1.1	1.0	1.0	1.0	1.2	13.1	13.1
2012	1.1	1.1	1.2	1.2	1.1	1.1	1.2	1.3	1.0	1.1	1.1	1.3	14.2	10.1
2013	1.2	1.2	1.3	1.2	1.2	1.2	1.4	1.4	1.1	1.2	1.1	1.3	15.5	7.4
2014	1.3	1.2	1.2	1.2	1.2	1.1	1.4	1.3	1.0	1.2	1.1	1.3	15.0	*3.1*

Source: Singapore Tourism Board, 2014

The top five inbound tourism markets for Singapore in 2014 were Indonesia, China, Malaysia, Australia, and India, contributing a total of 52.9 per cent of the 15.08 million visitors in 2014. Tourist arrivals from Hong Kong (17 per cent), South Korea (14 per cent) and Vietnam (11 per cent) also enjoyed double-digit growth. Tourist arrivals to Singapore in 2014 totalled 15.08 million, a dip of 3.1 per cent compared to 2013. The decline in tourist arrivals was due to lower tourist volume from key inbound source markets, namely Indonesia, China, Malaysia and Australia, and visa policies adopted by Japan and United States.

Visitor volumes from Indonesia fell 2 per cent to 3.02 million on the back of a weaker rupiah. Tourist arrivals from Malaysia declined by 4 per cent to 1.23 million visitors due to the deprecation of the Malaysian ringgit and the fact that the Superstar Virgo, a cruise ship, shifted its homeport to Hong Kong. There were only 1.07 million visitors from Australia, a decline of 5 per cent, and only 1.72 million Chinese tourists visited Singapore in 2014, compared to 2.26 million in 2013, a decline of 31.8 per cent. Three issues contributed to fewer Chinese tourists, the new tourism regulations in China, two aviation tragedies involving Malaysian airlines, and depreciation of the Euro (Table 2).

Table 2 - Singapore's top five inbound tourism markets

	2007	2008	2009	2010	2011	2012	2013	2014
1	Indonesia	Indonesia	Indonesia	Indonesia	Indonesia	Indonesia	Indonesia	Indonesia
2	PR China	PR China	PR China	PR China	PR China	PR China	PR China	PR China
3	Australia	Australia	Australia	Malaysia	Malaysia	Malaysia	Malaysia	Malaysia
4	India	India	Malaysia	Australia	Australia	Australia	Australia	Australia
5	Malaysia	Malaysia	India	India	India	India	India	India

Source: Singapore Tourism Board (2014)

1.3 Tourism in Singapore

Singapore is an island city-state with an area of 716.7km², and has a population of 5.47 million, made up of 3.84 million local residents (Chinese, Malays, Indian, Eurasians) and 1.55 million non-residents. GDP per capita was S$71,318 in 2014, an increase of 27 per cent compared to S$56,111 in 2009 (Department of Statistics, 2015). The travel and tourism sector is significant to Singapore's economy. The total contribution of the travel and tourism sector to GDP was S$39.7 billion or 10.9 per cent in 2013, higher than in previous years by 4.1 per cent (2011), by 3.6 per cent (2010) and by 2.4 per cent (2009) (SBR, 2015a). It is projected that the estimated contribution of the Travel and Tourism sector to Singapore's employment market will increase from 6.3 per cent (178,000 jobs) to 7.3 per cent of total employment (232,000 jobs), or 1 in every 13.8 jobs by 2020 (WTTC, 2010).

STB launched the 'Uniquely Singapore' brand campaign in 2004 and positioned the destination as warm, enriching and unforgettable. The new theme - 'YourSingapore' launched in 2010 focused on providing international visitors a personalized travel experience based on individual preferences and emphasized product diversity including theme parks, attractions, museums, shopping galleries and restaurants.

The government recognized that it is essential in developing new tourism attractions to make Singapore a more vibrant and appealing destination to compete with regional rivals like Bangkok, Hong Kong, Tokyo and Shanghai for more tourism dollars. Singapore captured worldwide attention with the opening of key attractions such as the Singapore Flyer, the world's largest observation wheel (2008), Gardens by the Bay (2012), and River Safari and its Giant Panda Forest (2014). Orchard Road shopping district is one of Singapore's most well-known tourist drawcards. Other popular attractions include the Mandai Zoological Gardens, Jurong Bird Park, Night Safari, Chinatown, and Little India. Singapore Tourism Board (STB) also focuses on promoting gastronomic, medical and sports tourism to attract more tourists. For example, Singapore has been hosting two gastronomic events annually such as the Singapore Food Festival (SFF) launched in 1994 and the World Gourmet Summit (WGS) since 1997.

Singapore is also Asia's leading medical tourism hub providing internationally accredited and patient-centric care and attracting medical tourists and ranked fourth out of 25 nations in the latest medical tourism ranking. In 2011, medical expenditure generated from medical tourism was S$980 million, up by 14 per cent increase over 2010 (STB, 2014; TTRweekly, 2014). Singapore placed itself in the world tourism map by hosting the Formula One (F1) Grand Prix since 2008 and attracted an estimated 250,000 tourists during the race weekend and incremental S$100 million in annual tourism receipts. Recently, Singapore hosted international events including the World Club 10s (Rugby) in June 2014 and Women's Tennis Association Finals (WTA) in October 2014 at the newly opened Singapore Sports Hub; both events arguably boosted its destination image (The Straits Times, 2014).

1.4 Singapore's Economy

Singapore is a highly developed and successful free-market economy. Based on a World Bank-IFC report, Singapore is ranked amongst the world's most competitive and innovative economies, and business-friendly countries. Singapore is able to attract foreign investment, particularly in pharmaceuticals and medical technology production, as it establishes itself as Southeast Asia's financial and high–tech hub (CIA, 2011). The economy rebounded by nearly 14 per cent in 2010 from a 1.3 per cent decline in 2009 that resulted from the global financial crisis. Singapore's GDP increased from S$266.7 billion in 2009 to S$372.8 billion in 2013 with strong performance mainly from the Manufacturing, Construction, Transport and Storage, Financial Services, and Hotels and Restaurants sectors. The total labour force reached 3.54 million, up by 3.8 per cent and unemployment remained at 2 per cent from 2012-2013 compared to 3.2 per cent in 2009. Subsequently, the economy grew by 2.1 per cent on a year-on-year basis in the 4th Quarter of 2014. Real GDP growth in 2015 is expected to be between 2-4 per cent (Department of Statistics, 2015), though final figures were not available at the time of writing this thesis.

1.5 Singapore's Integrated Resorts (IRs)

Singapore's first Prime Minister (PM), the late Lee Kuan Yew wrote in his memoirs, "From Third World to First" that he rejected a proposal to build a casino in Sentosa Island made after independence in 1965. In 2004, the government changed its position on a four-decade ban and reconsidered legalizing gambling as Singapore hoped to triple tourism revenue as manufacturers shifted to lower-cost countries including China and India. PM Lee Hsien Loong said on the 18 March 2005 interview that "There is not much doubt about the economic benefits to us. It's one of the things which we must do." According to The Straits Times on 16 April 2005, Mr. Lee Kuan Yew said, that "Singapore could suffer economically if it continued to keep its ban on casino gambling and the world could pass us by." Singapore received 19 proposals for casinos from companies including Las Vegas casino operators such as MGM Mirage, Harrah's Entertainment, and Wynn Resorts Ltd., Malaysia's Genting Berhad, Melbourne-based Tabcorp Holdings Ltd., and Hong Kong-based Melco International Development Ltd.

When PM Lee Hsien Loong announced on 18 April 2005 that it was necessary to scrap its long-standing ban on casinos, concerns about social costs were raised by community groups. PM Lee added that the cabinet approved the creation of the two integrated resorts (IRs) with casinos and he emphasized that Singapore was losing its competitiveness as tourists' length of stay decreased and other cities reinvented themselves. The government's motive was to boost the tourism sector due to regional competition from Bangkok, Hong Kong, Kuala Lumpur, Macau, and Manila. Singapore needs to reinvent itself to be a "cosmopolitan hub" and "vibrant and dynamic city" for tourism and business. The IRs are vital to the tourism strategy of doubling the international tourist arrivals to 17 million and tripling receipts to S$30 billion by 2015 (STB, 2005).

The government announced that Sands and Genting Berhad won the bids to build the two IRs at Marina Bay and Sentosa respectively in 2006. The two integrated resorts – Marina Bay Sands (MBS) and Resorts World Sentosa (RWS) were officially launched in February 2010 and April 2010 respectively. As noted previously, the two resorts consist mainly of theme parks, hotels, shops and restaurants, with casinos occupied 3 per cent (MBS) and 5 per cent (RWS) of the total floor space (Bloomberg, 2005; STB, 2015). By 2013, Singapore was the world's third largest gambling city behind Macau, the leading gambling capital (US$45.1 billion) with its proximity to mainland China and fewer visitor regulations, and Las Vegas (US$6.5 billion). MBS is however the world's most profitable casino (50 per cent), followed by the RWS (47 per cent), and Venetian Macau (36 per cent) (The Wall Street Journal, 2014). The two Singapore casinos lure high rollers by offering bets of up to S$1 million (US$800,000), the highest maximum wagers in the world. It is reported that Singapore's two casinos produced a total of S$6.07 billion in gaming revenue in 2013, an increase of 3.8 per cent, behind Las Vegas S$6.5 billion and Macau S$45.2 billion (channelnewsasia, 2015; casinocitytimes, 2014).

However, Singapore launched the two IRs with the intent to generate an economic jackpot without attracting such social ills such as addictive gambling and crimes that have plagued other casino capitals. Thus, casino operations are not considered the main social attraction s of these resorts, even if they were built by Casino operators. As reported by The Sunday Times, the Ministry of Trade and Industry (MITI) indicated that the two resorts contributed an average of 1.5-2 per cent to Singapore's annual gross domestic product. According to the two IRs, RWS hired more than 12,500 staff and MBS has 9,400 staff, the majority of whom are local residents. In addition to increased employment opportunities, the two IRs also claim to have benefitted businesses in Singapore by creating a multiplier effect and boosting the economy. For example, MBS procured US$590 million (S$799 million) worth of goods and services and 90 per cent was from local businesses. Similarly, about 90 per cent of RWS contracts in 2013 went to local small and medium-sized enterprises. MITI estimated the overall net increase in tax revenue from the casinos was about S$900 million for the 2010 financial year (The Sunday Times, 2014).

To deter local residents from patronizing the casinos, the government implemented an entry levy of S$100 (daily) or S$2000 (yearly). According to the Casino Regulatory Authority's 2012-2013 annual report, this safeguard measure was introduced to remind Singaporeans that "gambling is an expense and not a way of making a living, and they could possibly gamble away their savings at the casinos". The Tote Board, a government statutory board, channels the levies collected to fund social causes. The authority reported that an average of 17,000 local residents visited the casinos daily in 2012, a decline of 15 per cent compared to 20,000 when the two casinos first opened in 2010. A total of S$174 million from both daily and annual entry levies was collected in 2012, a dip from S$216 million in 2010.

According to The Sunday Times, Singapore wants to show that its casinos are the most lucrative and best regulated in the world. After an impressive debut, casino revenue growth stagnated due to the government's reluctance to relax its strict gambling rules or to allow the casinos to expand. The Singapore regulators take months to approve casino marketing programs and require residents to deposit S$100,000 to apply for credit in addition to the entry levy. The casinos also honor families' request to ban relatives with gambling addictions. MBS was fined S$197,500 and RWS fined S$20,000 by the Casino Regulatory Authority of Singapore (CRA) as penalties for breaches of social safeguards and other rules detected between the first six months of 2013. The CRA stated that MBS had let in five residents without valid entry levies, and another resident stayed above 24 hours, the maximum time allowed on a daily entry levy. There were also six illegal entries of residents; three with self-exclusion orders and three minors. These breaches resulted in fines totalling S$122,500. MBS was also fined S$75,000 for permitting an unauthorized person to exercise the functions of a special employee. RWS was fined S$20,000 as it let in two minors and a Singapore PR without a valid entry levy (The Sunday Times, 2014).

Nevertheless, the Singapore government believes that the growing number of casinos worldwide justified the rationale of adopting a casino tourism strategy similar to that widely adopted elsewhere in Asia and Oceania, with an estimated 236 licensed casinos in those locations in 2012. Market leaders in casino tourism are Macau, Philippines, Cambodia, India, Papua New Guinea, Australia and South Korea (Table 3). It is important to note though that many of these casinos are very small and not very well appointed facilities.

Table 3 – Licensed Casinos in Asia and Oceania

Country	Number of casinos		Country	Number of casinos
Australia	17		New Zealand	2
Cambodia	32		Papua New Guinea	20
Hong Kong	13		Philippines	33
India	20		Singapore	2
Indonesia	4		Solomon Islands	2
Laos	4		South Korea	17
Macau	35		Sri Lanka	5
Malaysia	2		Tinian	3
Myanmar	5		Vanuatu	2
Nepal	8		Vietnam	7
North Korea	3		Total	236

Source: Gamingfloor.com and Worldcasinodirectory.com (2012)

The Singapore government should be credited with the efforts to address the community's concerns regarding adverse social consequences associated with addictive casino gambling. The National Framework on Gambling was proposed that will cost S$20 million to set up and S$40 million to run annually. A National Council on Problem Gambling (NPCG) is established to address with problems due to addictive gambling. The introduction of daily entrance fee of S$100 or S$2,000 for annual membership and a ban on credit was launched to deter local residents from patronizing the casinos. There are also steps to cope with gambling-related crime and to protect the good reputation of Singapore, a casino regulatory authority is established to oversee and control the gaming sector. These precautionary measures are laudable and afford lessons that other destinations could learn from. However, the qualities of Singapore as an economic, social and political entity do restrict the wider applicability of certain policies that might not be easily implemented in other destinations (Henderson, 2006).

Despite the initial success of Singapore's IR tourism initiatives, the increasing competition in this sector within the Asian and Oceania regions means that it is strategically necessary to research the tourist perceptions of the two IRs in general, and their casino operations in particular, and whether they contributed to and enhance the brand image of Singapore as a tourism destination. In addition, it is important to explore the perceptions of the IRs by stakeholders in Singapore including tourism partners, and government agencies, and the local community. If the resort and casino tourism strategy is viewed favourably by tourists; the industry and the local community, a strong case for the sustainability of the two IR's could be made.

This research is therefore designed to evaluate whether the IRs provide a sustainable competitive advantage to Singapore as a tourism destination, as measured by the following:

1.6 Relevance of Thesis

The thesis is relevant to the interests of government and destination managers and in particular to the Singapore Tourism Board (STB). With the legalizing of gambling in 2005 and the newly launched Integrated Resorts (IRs) including the two casinos- Resorts World Sentosa (RWS) and Marina Bay Sands (MBS) in 2010, more than 11.6 million international tourists visited Singapore, an increase of 20 per cent compared to 2009. As an independent investigator, not funded by any government, IR, or casinos/lobby interest group, the work seeks to provide a clear and unbiased view of stakeholders' perceptions of IR development in Singapore.

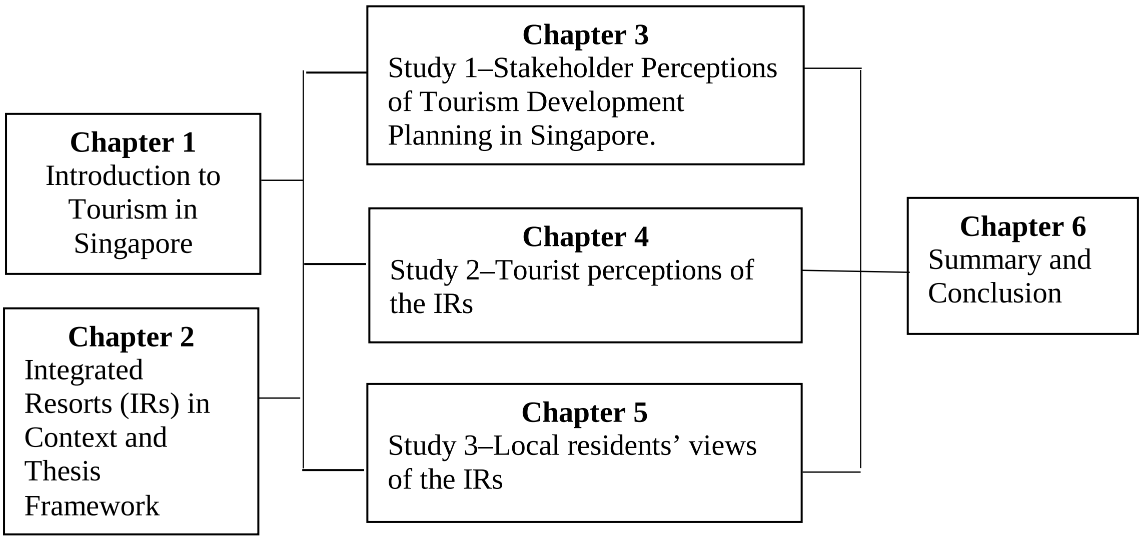
a) An exploration of stakeholder perceptions of the Singapore Tourism Board strategy to promote the Integrated Resorts as a Tourism Development Planning project vital to the success of destination Singapore (Study One - Chapter 3);

b) An investigation of tourist perceptions of the IRs and their contributions in enhancing Singapore's appeal as a tourism destination (Study Two – Chapter 4); and

c) An investigation of local resident perceptions of the two IRs and their impact on the community in Singapore (Study Three – Chapter 5).

1.7 Chapter Flow Chart

The entire above can be summarized and visually presented by the following chart.



Chapter 2

Integrated Resorts in Context and Thesis Framework

Chapter Outline

This chapter provides a literature review discussing the key issues of destination competitiveness, destination branding, destination choice, and the impact of the IR-based tourism strategy. To identify the key success factors of destination competitiveness, it is necessary to review detailed tourism destination frameworks such as those introduced by Crouch and Ritchie's (2003) and Dwyer and Kim's (2003) integrated models. Crouch and Ritchie suggest it is crucial that a successful destination should be able to manage both resources and supporting factors to create competitive advantage and enhance its destination appeal effectively. It is acknowledged that developing a good destination branding image can differentiate a destination from its competitors. Another relevant concept is destination choice, as consumers are faced with numerous locations to choose from, it is important to understand how consumers make travel-related decisions.

The IR-based tourism strategy is perceived favourably by governments as an effective approach to enhance a destination's appeal and boost tourism statistics and economic performance. Dwyer and Kim (2003) emphasized that striving to achieve socio-economic prosperity should be the ultimate goal of destination competitiveness. This mean that understanding perceptions and having the support of local residents will boost the sustainable success of new tourism initiatives like the IRs. However, studies have also shown that if there is a casino tourism component in the IR context, as in Singapore, this can lead to complications for the host society as well as for the tourist. A discussion of four (five?) theoretical frameworks; social exchange theory (SET), social representation theory (SRT), the social capital (SC) concept, the gambling tourism support model (GTSM), and the gaming impact perception matrix (GIPM) is therefore relevant to understand the social implications of casino tourism within the overall study. This chapter also sets out a proposed Singapore destination competitiveness conceptual model and considers the three research questions embedded within the model and how they can be answered.

2.1 Destination Competitiveness

2.1.1 Perspectives on destination competitiveness

Destination managers should define the nature of a tourism destination in an attempt to enhance its appeal and competitiveness. It is widely accepted that a tourism destination can only be competitive and sustainable if it delivers a superior product or travel experience and more importantly, also enhances the economic prosperity of the local residents. This is in accordance with Article 5 of 'WTO Global Codes of Ethics for Tourism' which states that tourism should be mutually beneficial to a nation and the local residents in terms of higher tourism receipts, improvements in standard of living, creation of jobs, and environmentalism (Dwyer and Kim, 2003; Gomezelj and Mihalic, 2008).

2.1.2 Destination competitiveness frameworks

Ritchie and Crouch (2003) introduced the Destination Competitiveness framework which focuses on a destination's resource endowments (comparative advantage) and the ability to deploy its resources (competitive advantage) to enhance its tourism appeal and economic wealth. This framework highlighted two aspects – firstly, influences of external forces – global macro environment and competitive micro environment on the tourism system (see Fig. 1). Secondly, sustainable destination competitiveness is dependent on five determinants: *(a) Supporting factors and resources* which are necessary for an efficient and effective tourism system; *(b) Core resources and attractors* to boost a destination's appeal; (c) *Destination management* to lead and coordinate tourism partners; (d) *Destination policy, planning and development* which underpin effective marketing strategies; and (e) *Qualifying and amplifying factors* such as location and security. The model identifies 36 destination competitive attributes.

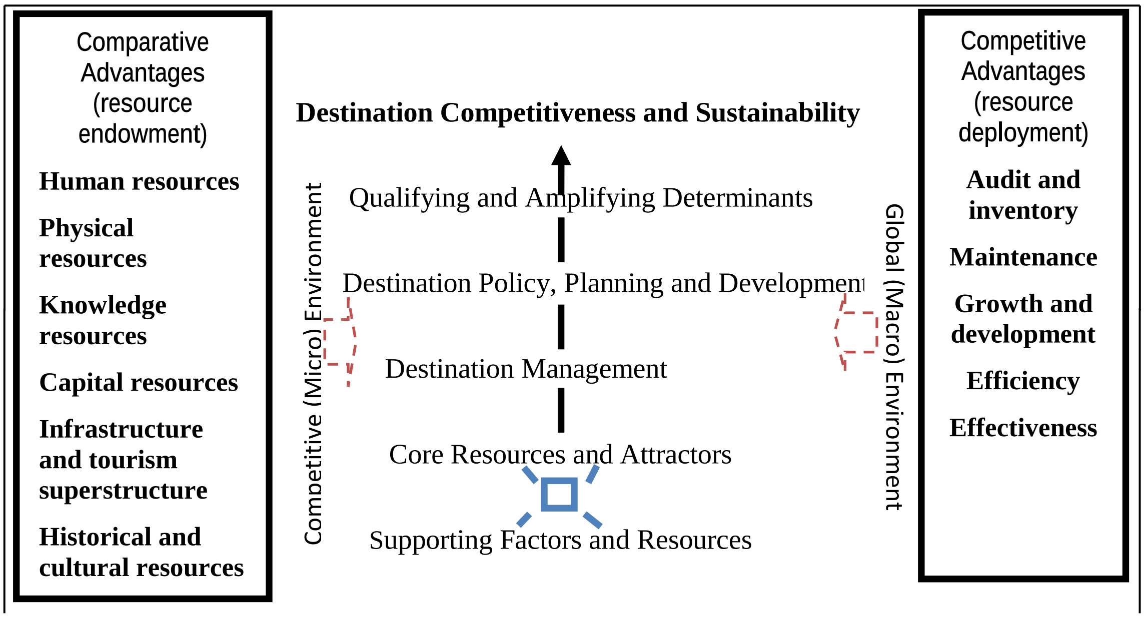


Figure 1–Destination competitiveness and sustainability
Source: adapted from (Crouch and Ritchie, 1999)

Dwyer and Kim (2003) conducted empirical tests in Korea and Australia in 2001 and developed the Integrated Model of Destination Competitiveness. Their model also suggests that destination managers should analyze the implications of the external environmental forces and that good management of the destination's inherited resources and supporting factors are needed to develop a highly competitive and sustainable tourism industry.

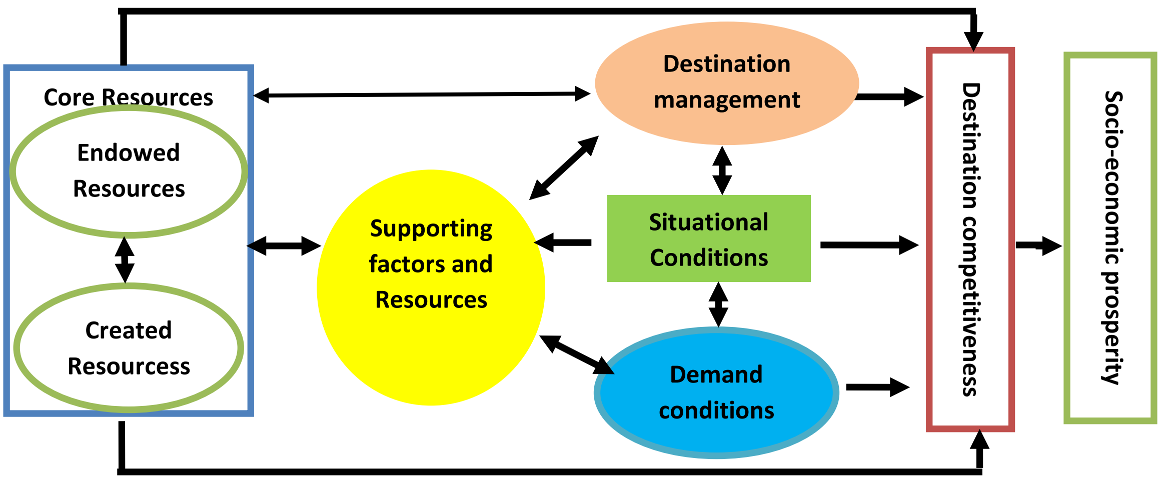


Figure 2 – Integrated Model of Destination Competitiveness
Source: adapted from Dwyer and Kim, 2003

It is useful to compare the key similarities and differences between these two models. Ritchie and Crouch's (2003) model emphasizes a group of factors that they term 'qualifying and amplifying' determinants (location, safety/security, cost/value, interdependence, awareness/image, and carrying capacity), and these are comparable to the 'situational conditions' or external environmental forces relate to economic, social, cultural, demographic, environmental, political, legal, government regulatory, technological, and competitive trends, in Dwyer and Kim's (2003) model. Other key similarities include the core resources and attractors, supporting factors and resources, and both recognise the impact of the global (macro) and competitive (micro) environments on tourism destinations. This mean that the industry structure (operating environment) and uncontrobllable forces and events (remote environment) have strong influences on destination competitiveness.

There are two key distinctions between Dwyer and Kim's model from that of Ritchie and Crouch. Firstly, Dwyer and Kim (2003) recognize that *demand conditions* are important. The demand conditions category consists of three main elements of tourism demand-awareness, perception and preferences. Destination marketers can boost awareness through aggressive marketing activities. If the tourist's perception of product offering matches his/her own preferences, this can encourage actual visitation. A destination needs to enhance or maintain competitiveness to develop a tourism product that matches the evolving consumer preferences. Secondly, Dwyer and Kim emphasise that destination competitiveness should be an intermediate-goal and a pre-requisite towards achieving national economic success through higher output, more employment opportunities, higher per capita incomes, and increased economic growth rates.

Based on Ritchie and Crouch (2003), Crouch (2011) conducted a study with 83 respondents primarily from Europe, North America, Australia and New Zealand who were either professionals from DMOs and tourism organizations, or tourism researchers with destination management skills and marketing knowledge. The findings confirmed that a destination's core resources and attractiveness (physiography, scenery, climate) are perceived as the crucial factor in tourist decision making processes. A destination may lack natural endowments can enhance its appeal by its rich culture and history, hosting special events and a thriving entertainment sector. Effective marketing strategies can create a favourable destination image and influence tourists' perception positively about a destination's attractiveness (Crouch, 2011).

Current destination competitiveness models are generic and may not be applicable in all respects for a geographically small destination, particularly Singapore. Ritchie and Crouch argue that a destination will be competitive if it has five determinants including core resources and attractors, and supporting factors and resources. It is interesting to research Singapore as a case study given that, while it has limited inherited resources, it has developed strong supporting factors (good infrastructure and accessibility), innovative destination policy (IRs), and sound destination management strategies (stakeholder management) that have enhanced Singapore's appeal as an attractive destination to international visitors. Dwyer and Kim's model focuses on the local residents' social well-being and measures competitiveness in the form of 'socioeconomic prosperity'. However, they did not suggest specific criteria in (for) measuring the social welfare or identifying specific quality of life variables, such as; infrastructure, cost of living, income or recreational opportunities. Fresh research on identifying elements that enhance the welfare of local residents will be useful. It is meaningless if the IRs are an economic success generating higher tourism receipts and creating more jobs, but also resulted in the rise of social problems such as money laundering, more crimes, and high divorce rates could hurt Singapore as it becomes a gambling city rather than an attractive destination for tourists.

2.1.3 Destination Management

2.1.3.1 Rationale of Destination Management

A successful and sustainable tourism sector requires effective destination management strategies. There are five benefits of managing a destination: (a) *establishing a competitive edge* by creating a unique tourism experience; (b) *ensuring tourism sustainability* by focusing on the welfare of local residents; (c) *spreading benefits of tourism* including rural areas; (d) i*mproving tourism yield* – extending average visitor length of stay and increase per capita visitor expenditure; and (e) *building a strong and vibrant brand identity* – delivering excellent value can boost brand loyalty and repeat visitations (WTO, 2007). An example of a successful destination management policy during a tourism disaster was implemented in Singapore during the outbreak of the Severe Acute Respiratory Syndrom (SARS) that led to a decline of 74 per cent year-on-year tourist arrivals to Singapore in May 2003. STB together with industry players unveiled the S$200 million *Singapore Roars* program and attracted 8.3 million (34 per cent increase) visitors in 2004 (STB, 2003/2004). In an interview with Xinhua News Agency, Lim Neo-chian, deputy chairman and chief executive of the Singapore Tourism Board (STB) outlined the two measures introduced to counter the SARS outbreak and lure visitors back to the country. During the SARS period, the STB rolled out two major marketing campaigns, "Cool Singapore Award" and "Step Out! Singapore," to restore confidence in the tourism industry. The "Cool Singapore Award" certification system was launched in April 29 to implement the best practices in SARS prevention including compulsory staff temperature checks in hotels, airport, convention venues and other tourism facilities, the highest standards of disinfection, and screening of vendors and suppliers. The "Step Out! Singapore" programme was aimed at encouraging Singaporeans to step out of their homes and get back onto the streets. The Great

Singapore Sale 2003 was received and boosted retail sales by 6.8 per cent month-on-month in June, followed by the ‘Singapore Roars” programme lauched on June 18 aimed to attract targeted visitors from Malaysia, Indonesia, Thailand, India, Britain, Australia, Korea, Japan, China and the United States (CHINADAILY, 2003).

2.1.3.2 Destination Management Organization (DMO)

Tourism destinations are considered as competitive when they deliver a highly satisfactory visitor experiences and enhance the social and economic well-being of the local residents. This can be attained by creating Destination Management Organizations (DMOs) to lead and coordinate with tourism partners, form alliances in developing attractive tourism products and deliver memorable tourism experiences for visitors. The tourism literature acknowledges the five complex roles of DMOs – industry coordination, leadership, product development, visitor services and visitor liaison (Bornhorst, Ritchie, and Sheehan, 2010; Presenza, Sheehan, and Ritchie, 2005). DMOs should have government support in coordinating with private (tourism and hospitality firms) and public establishments (government agencies, transportation) involved in tourism development (Dwyer and Kim, 2003). Fig. 3 depicts key contributions of DMOs in destination management (WTO, 2007).

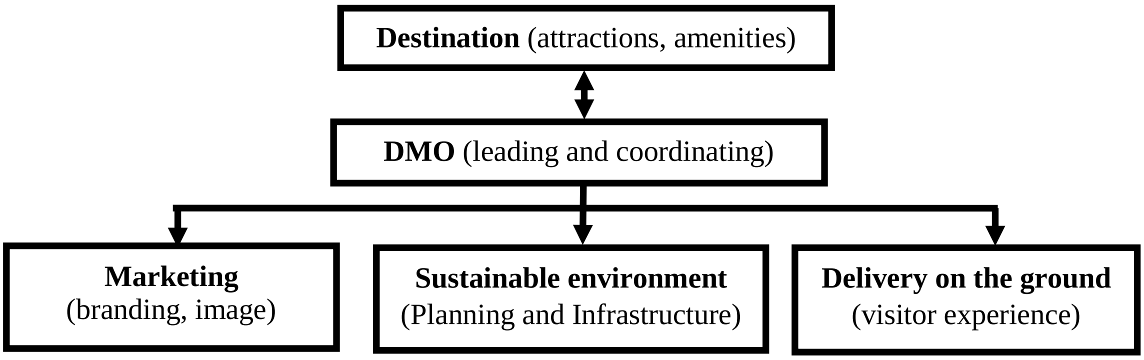


Figure 3 – Destination management
(Source: adapted from WTO, 2007)

Destination managers should be familiar with both external and internal processes of destination management. The nine external elements are – organization, marketing, quality experience management, information provision, human resource management, finance and venture capital, visitor management, resource stewardship, and crisis management. Internal elements focus on operational efficiency within DMOs such as governance, structure, budgeting, procedures, activities, communication and public image. A public sector-oriented DMO focuses on community development. Conversely, profit accountability will dominate in a private sector-orientated DMO (Ritchie and Crouch, 2003). Most studies focus on evaluating the success of a destination rather than the effectiveness of DMOs. Bornhorst, et al. (2010) conducted phone interviews with 84 stakeholders from twenty-five destinations in Canada. The stakeholders included; politicians, DMO operational executives, DMO Chairs, Attraction managers, Event managers, Hotel general managers, Convention centre managers, and Chamber of Commerce Presidents. The study revealed stakeholders define destination success based on five categories; economic success, and product and service offerings were rated highest (48%), followed by marketing effectiveness (46%), quality of visitor experiences (36%), and internal stakeholder interaction (26%). The key determinants for a successful DMO are operational activities in marketing and management (86%), internal stakeholder relations (60%), performance measurements of visitors (35%), and both financial and human resources (32%). The researchers concluded that the determinants of success for a destination and DMO are similar as stakeholders listed input, process, and performance as key determinants of success.

2.1.3.3 Managing Stakeholders

The notion of 'Stakeholder management' or a systematic stakeholder approach emerged in the mid-1980s. The key influence was the publication of R. Edward Freeman's "Strategic Management-A stakeholder approach" in 1984. Stakeholder management suggests that destination managers must formulate and implement processes which satisfy all groups of tourism stakeholders to achieve sustainable urban tourism development. This means that destination managers should be stakeholders-centric or oriented toward the well-being of stakeholders rather than treating them as "means to a corporate end". Freeman defined stakeholders broadly as "any group or individual who can affect or who is affected by the achievement of the organization's objectives" (1984:46) – and develop a theory of stakeholder identification drawn from this various theoretical literature.

Research suggests that the stakeholder theory and social network analysis (SNA) are relevant to understanding the process of stakeholder management. Timur and Getz (2008) acknowledge 'critical stakeholders' as having legitimate power over others in destination development. Bornhorst, et al. (2010) emphasise that DMOs need to perform and meet the various demands and agendas of their assessors – primary stakeholders (employees, investors, customers, shareholders, suppliers, trade associations and environmental groups), and public stakeholders (government and community). For example, Braley (2006 cited in Ford, Peeper, & Gresock, 2009) found that direct stakeholders (hotels, restaurants) and indirect stakeholders (hospitals, banks) benefited from tourism in the U.S. Bryd, Bosley, and Dronberger (2009) concluded that effective communication between DMOs and the four stakeholder groups- residents, entrepreneurs, tourists and government officials in rural eastern North Carolina, resulted in better informed decisions, a clearer understanding of impacts of tourism projects, stronger tourism products and the delivery of more memorable tourism experiences. Timur and Getz (2008) observe that the social network analysis (SNA) is useful in managing diverse stakeholders. SNA focuses on three principles–*actors* (entities, organizations), *links* (relationships between actors), and *density* (number of connections between actors within the network). Actors are central (powerful) if they have high network centrality, i.e. numerous links with others within the system. The World Tourism Organization (WTO) recognizes that *actors* are stakeholders (government, industry and community) and partners of sustainable tourism. Effective DMOs should establish good networking relationships to facilitate communication with the government, industry and community. It is important to include perspectives of all stakeholders to fully understand the attitudes and perceptions of the community towards the new tourism project-IRs.

2.2 Destination Branding

2.2.1. The Role of Branding

Branding aims to create a positive image, boost visitation intention and build customer loyalty. Branding increases consumer awareness and creates a destination image congruent with the lifestyle and expectations of tourists. Some analysts consider that establishing an emotional relationship between tourists and destination is a priority as destination branding can be a tool to attract visitors or to gain advantage over other destinations (Morgan, Pritchard, and Piggott, 2003; Murphy, Benckendorff, and Moscardo, 2007).

2.2.2 Destination Image and Destination Branding

There is a debate a to how the concepts ‘brand’ and ‘image’ differ from or are associated with each other. Some researchers argue that destination branding is overwhelmingly associated with destination image (Morgan, Pritchard and Piggott, 2002). Others perceive that image is very different from branding; yet the latter is created through the former. Cai (2002) suggests that image and brand are interrelated concepts; image is an important building block in developing destination brands and brand image is the set of beliefs consumers hold about a particular brand. Brand image encompasses the abstract reality that people buy products or brands for something beyond their physical attributes and functions (Jensen and Korneliussen, 2002).

Another key role of DMOs is to promote destination branding as a strong brand is necessary to distinguish from other competitive destinations. Destination branding involves fostering an emotional attachment with tourists that can lead to both actual visits and repeat visits. However, destinations are facing challenges in enhancing their appeal to well-informed and demanding tourists. Several authors view destination image as a complex phenomenon since the process of creating impressions for individuals is subconscious, difficult to measure, and involves influencing the knowledge, feelings and perception of tourists about a destination. It is vital to enhance the image of a destination relative to competitors and to understand destination image as perceived by different tourist segments (Echtner and Ritchie, 1991; Henderson, 2007).

Destination branding involves creating a unique identity which differentiates a destination from competing destinations as Ritchie and Crouch (2003) suggest. A branding is distinctive, identifiable and deliverable. Destination branding is complex as destinations attract diverse tourists and tourism experiences delivered should match tourists' expectations. A positive destination image and strong brand equity in the consumers' mindset are necessary in formulating an effective destination positioning strategy. The 'relational brand networks' model indicates that successful destination branding means 'fulfilling a promise, sound stakeholder relationship, selecting suitable markets and adopting a service-oriented approach' (Hankinson, 2009). It is useful to cultivate branding within an organization with respect to culture, leadership, coordination and communications, and sound stakeholder partnerships. Tak and Wan (2003) noted tourists from North Asia viewed Singapore as a food or shopping paradise compared to cultural heritage perception held by tourists from Oceania, U.S. and Europe.

2.2.3 The Branding Process

Researchers propose different approaches in establishing effective branding strategy for a destination. Morgan et al., (2002) suggest that destination marketers should create a unique brand identity as a means to distinguish a destination. This approach assumes tourism stakeholders will share and support the corporate vision. This involves identifying the core values of a brand, creating a unique brand identity and vision, communicating the brand effectively and managing the branding strategy. The '100% Pure New Zealand' campaign was an example of a successful branding campaign as it delivered a clear, consistent, quality and unique identity of New Zealand as a tourism destination. The brand identity approach is, however, arguably simplistic and does not focus on stakeholder management.

Unlike Morgan's approach, Balakrishan (2009) argues that creating brand differentiation is the key to launching a successful destination branding strategy. The destination branding process should involve stakeholders support of a strategic vision, creating a unique brand identity that is congruent and matches consumers' perception. Balakrishan proposes that a destination branding strategy should consists of five components; *(1) vision and stakeholder management* – the tourism vision is shared and promotes a service-oriented culture; *(2) target customer and product portfolio matching* - understanding attitudes and perceptions of customers and matching image with the customers' profile; *(3) positioning and differentiation strategies* - a good positioning statement should be simple, truthful and it enables customers to make rational decisions; *(4) communication strategy* - adopting a clear communication strategy in branding and select a suitable media type and word-of-mouth (WOM) recommendations; *(5) feedback and response management strategies* - conduct market research to evaluate strategy effectiveness. Balakrishnan's approach is relevant as the Singapore government launched the IRs with the vision to be a leading casino tourism destination, supported by good stakeholder management, effective positioning and promoting Singapore to targeted tourist segments effectively. It remains to be seen if setting a specific tourism vision enhances a destination's appeal and how destination branding affects tourists' purchase decision process.

2.2.4. Brand Personality

As tourism destinations become more substitutable due to increasing competition in global tourism markets, destination personality is seen as a viable metaphor for building destination brands and creating a unique brand identity. Ekinci and Hosany (2006) define destination personality as "the set of personality traits associated with a destination. A distinctive and attractive destination personality can effectively leverage the perceived image of a destination, and thereby, influence tourist choice behaviour. Research suggests that brand personality is relevant in the context of destination branding because a consumer's preference and behaviour may be influenced by the theory of symbolism. It is observed that consumers can be motivated to make purchases if they perceive the products as consistent with their own personality and enhancing their egos. Ekinci (2003) conceptualizes the relationship between destination image, brand and personality (Fig.4). Successfully branded destinations create an emotional link with customers based on the congruity between the destination's personality traits and their own self-image.

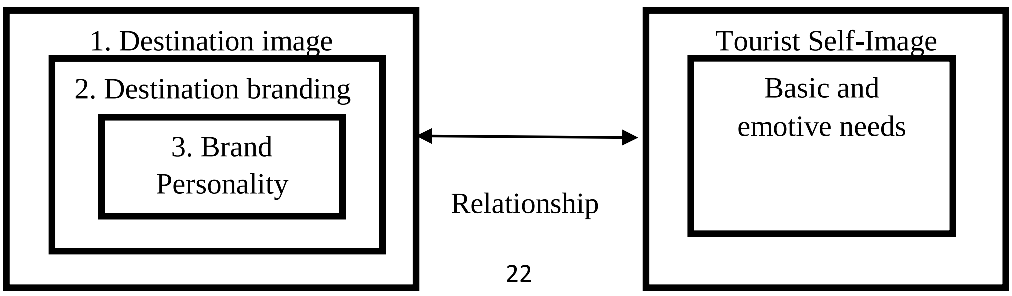


Figure 4 – Destination Image and Destination Branding (Source: Ekinci, 2003)

Brand personality is unique as it connects with customers and acts as a consumer's reference point, and it is characterized by personality descriptors, such as sophisticated Europe; welcoming Wales; friendly Spain; vibrant London; and romantic Paris. Ekinci and Hosany (2006) suggest that creating a distinctive brand personality can enhance brand equity; influence consumer behaviour; develop emotional ties; promote trust and loyalty within the brand; and enhance a destination's image and influence tourist choice behaviour. Henderson (2000) surveyed 250 tourists and local residents on the *New Asia-Singapore* brand campaign and identified several personality characteristics of Singapore's brand: youthful, cosmopolitan, vibrant, modern, reliability, and comfort, and the image is efficient, sophisticated, contemporary, safe and secured. However, 90 per cent of respondents were unaware of and 60 per cent were unimpressed with the brand personality of Singapore as a destination.

2.2.5 Branding of Gaming destinations

Gaming destination marketers recognize that understanding the perception of tourists, both casino gamblers and non-gamblers, will enable them to position and implement marketing strategies more effectively (Kneesel, et al. 2009). Moufakkir, Singh, Woud, and Holecek (2004) made three observations: first, casino gamblers have higher expenditures on non-gaming activities, second, heavy spenders are not attracted to a destination because of the presence of casinos, and third, casino gamblers prefer a variety of vacation experiences. Kneesel, Baloglu, and Millar (2009) conducted an online survey of 222 respondents in four gaming markets with high gross revenue: Las Vegas, Atlantic City, Chicagoland (IL, IN), and Connecticut. The study found that Las Vegas had the highest average score for overall image, recommendation, and visitation intention, followed by Atlantic City, and then Connecticut and Chicagoland. This was consistent with the favourable perceptions and brand descriptions of Las Vegas such as; lights, shows, money, gambling, entertainment, bright, big, and casinos (cognitive), excitement, fun and great (affective). Researchers suggest that destination managers can compare what they can offer (brand identity) with what consumers are demanding (brand image) and introduce a communication strategy to close up gaps between the brand identity and brand image effectively.

Dioko and So (2012) conducted a survey to 494 visitors and examined the overall and individual effects of visitors' perceived brand equity of Macao as a gaming destination and their perceived brand equity of flagship/branded hotels. The study revealed that the visitors' overall destination brand equity (DBE) perceptions rather than hotel brand equity perceptions (HBE) is robustly significant when it comes to influencing visitors' response to the brand loyalty scenario. The implications of this study are useful to destination management organizations seeking to enhance their destination-branding efforts and those managers from international branded hotel chains.

2.3 Destination choice

2.3.1 Introduction

Today's marketers face challenges of attracting visitors as tourists are more informed and have the luxury of alternative choices in selecting a specific destination. It is accepted that a tourist's decision making process is often complex and multi-faceted as choices for different elements are interrelated and evolve over time. Yet, destination managers are expected to comprehend the complex processes involved and identify the criteria of selection in a tourist's destination decision-making process. The inability to understand the consumers' mindset (Kotler's 1990 black-box model) could result in tourism managers' failing to promote a destination effectively, inadequate delivery of quality tourism experience, higher tourist dissatisfaction and eventually, lower tourist volumes to a destination.

Previous studies on the destination decision process resulted in several theoretical models (Woodside and Lysonski, 1989; Gunn, 1989; Um and Crompton, 1990). Woodside and Lysonski (1989) proposed a general model of traveller leisure destination awareness and choice. Destination awareness includes four categories: consideration set, inert set, unavailable and aware set, and inept set. Um and Crompton's (1990) destination choice set model suggested that a tourist's destination choice is made through a three-stage sequential process consisting of an awareness set, an evoked set, and the final destination choice. However, the choice set model drew criticisms as (Crompton and Ankomah, 1993) argued that this model was too simplistic, and (Lam and Hsu, 2006) added that it was not a well-researched model (Um and Crompton, 1990; Crompton and Ankomah, 1993; Lam and Hsu, 2006; cited in Hsu, Tsai and Wu, 2009).

2.3.2 Tourism Destination Loyalty Model

The proposed Tourism Destination Loyalty (TDL) model is adapted from the Destination Loyalty Formation (DLF) framework proposed by (Gursoy et al., 2014). The TDL model embraces two streams of variables that differ in time - pre-trip behaviours and post-trip behaviours of tourists. The pre-trip variables are represented by previous travel experiences, key sources of information, destination image, and travel motivations. The post-trip variables entail consumer value theory, perceived service quality and tourist satisfaction. This model helps hospitality and tourism managers understand and identify factors that influence tourists' loyalty formation behaviour. For example, tourists' satisfaction and service quality are the major determinants of tourists' loyalty formation behaviour, suggesting that tourists who are not completely satisfied with tourism service delivery may not revisit a specific tourism destination in the future. The pre-trip components suggest that it is useful to understand the factors that have strong influence on tourists' perception of destination image, identifying dimension valued by tourist, and positive previous travel experience as these factors ultimately affect customer loyalty. Refer to Fig.5 for the TDL model. A detailed discussion on the push/pull factors of travel motivation is illustrated in the next section.

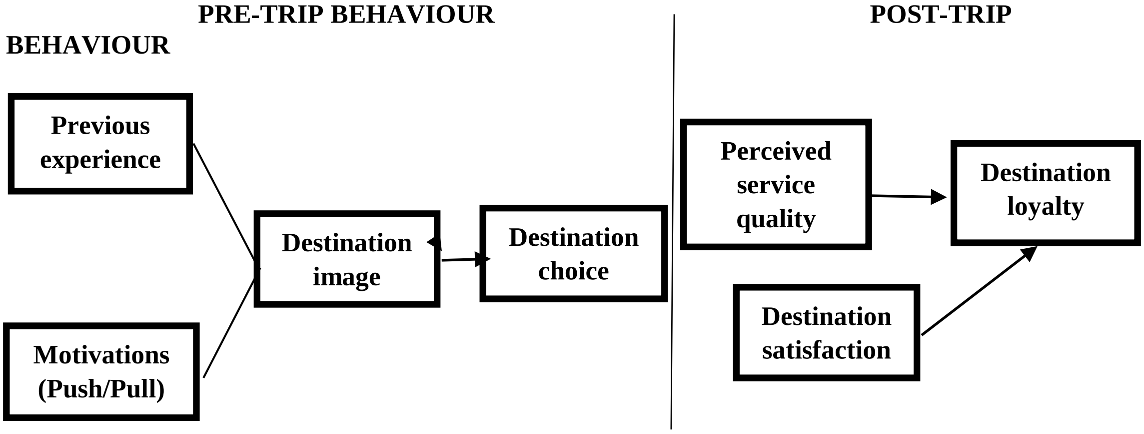


Fig. 5 Tourism Destination Loyalty
Source: adapted from Destination Loyalty Formation (Gursoy, et al. 2014)

Successful destination managers need to examine the complex decision making process relating to how leisure and business tourists select a destination. This knowledge enables managers to comprehend visitors' mindset and to increase tourist volumes for both first-time travellers and repeat visitors. The TDL model emphasized that destination choice is the key objective in the pre-trip behaviour of tourists. Destination managers should identify key factors that influence perceived service quality to achieve higher destination satisfaction. This model is also applicable to casino executives as it is also important to understand the mindset of gambling tourists.

A study by Zhang, Leung and Qu (2007) proposed a refined model of factors affecting convention participation decision-making comprises four main dimensions, association/conference factors, personal/business factors, location factors, and total cost factors.

There were no changes made to association/conference factors and personal/business factors developed in the fundamental framework of Oppermann and Chon (1997) model. Zhang et al., (2007) suggest that the location factors be sub-categorized into attractiveness and accessibility of the convention destination; and the total cost factors be sub-categorized into total time cost and total monetary cost of the trip. This model is useful to destination managers as the IRs are also promoting the convention facilities to MICE tourists.

2.3.3 Travel Motivations

It is acknowledged that a tourist's decision making process is influenced by factors including: destination image, destination attributes, safety and perceived risks, travel costs, travel philosophies, travel benefits, motivation and cultural values (Lehto, O'Leary, and Morrison, 2001). A review of the relevant literature (Dan, 1981; Uysal and Jurowski, 1993; You, O'Leary, Morrison and Hong, 2000; Klenosky, 2002) suggests that a tourist's travel motivations are subjected to both external (pull) factors and internal (push) factors. The 'Push' motivation creates the intangible or intrinsic desires to travel and consists of seven socio-psychological motives (escape, self-exploratory, relaxation, prestige, regression, kinship enhancement, and social interaction) and two cultural motives (novelty and education). The 'Pull' motivation is the tangible resources and traveller's perception and expectation towards the attractions or attributes of a specific destination and includes, natural and historic attractions, food, people, recreation facilities, and destination image. Both 'push' and 'pull' travel motivations are interdependent and managers should focus on matching the key attributes of a specific destination with the needs and expectations of potential tourists (Dan, 1981; Uysal and Jurowski, 1993; You, O'Leary, Morrison and Hong, 2000; Klenosky, 2002; cited in Khuong and Ha, 2014).

Some researchers have investigated the 'push and pull' model based on Asian destinations. Kau and Lim (2005) summarized key findings from studies on travel motivations of tourists from several Asian markets, and found that Hong Kong tourists tend to seek personal fulfillment, sightseeing, relaxation, new experiences, prestige and kinship. Tourists from South Korea focused on safety, pleasure, personal fulfillment, relaxation, prestige, new experiences, natural experiences, resorts, cultural experiences, and sports and family experiences. Tourists from Japan prefer exploration, novelty in natural attractions, climate, dream fulfillment, benefits sought, relaxation, trip characteristics, family, and sports and outdoor activities. Tourists from China are mainly keen on overseas investment, education, and sightseeing. Hsu et al. (2009) identified that the top three motives of visitors to Taiwan were to gain rest and relaxation, personal safety, and environmental safety.

Khuong and Ha (2014) extended the travel motivations research to Vietnam, an emerging tourism destination in Asia as tourist arrivals reached 7.5 million in 2013, an increase of 10.6 per cent compared to previous year. A survey was conducted to 426 international tourists in Ho Chi Minh City and findings revealed that the ‘pull’ factors had strongest effect on Return intention (RI) followed by Destination Satisfaction (DS), and ‘push’ factors had weakest effect on tourists revisiting Vietnam. Further studies also supported the views that internal motives (push factor) and external motives (pull factor) positively affected tourist satisfaction of destination and return intention to destination in the future (Qiao, Chen, Guan and Kim, 2008; Kim, 2008; Lee, Jeon and Kim, 2011; Tang, 2013; Pratminingsih, Rudatin and Rimenta, 2014).

2.3.4 Previous travel experience

Much of the academic literature suggest that previous experiences with a destination can have a significant impact on tourist’s decision making, destination selection process, tourist’s perception of destination image and future behaviour. Other researchers emphasized that the length of travel experiences and place attachment or the level of involvement can also affect the formation of destination image in consumers’ mindset (Bosnjak et al, 2011; Bruwer and Thach, 2013; Gursoy and McClearly, 2004a, 2004b; Polo Pena et al, 2013; Baloglu and Mangaloglu, 2001; Chen and Gursoy, 2001; Chi, 2012; Beerli and Martin, 2004; cited in Gursoy, Chen and Chi, 2014). Research studies on destination choice behaviour of tourists over longer time periods are critically absent as academia and industry place little emphasis on understanding the lifelong destination choice pattern of individuals. Many tourism destinations and tourist attractions rely on the repeat visitor segment, yet there are limited studies on consumer loyalty and repeat purchase in tourism.

2.4 Integrated Resorts/Casino Tourism

2.4.1 Evolution of Integrated Resorts/Casino Tourism

The Academic literature suggests that both Integrated Resorts and Casino tourism have developed remarkably worldwide over the past 50 years as many tourists are attracted to and visit casinos, and resorts integrate this attraction with the others that they offer. This popular trend has encouraged governments, industry observers and tourism scholars to argue for the legalization of casino gambling to boost national tourism industries (Berry and Berry, 1990; Collins, 2003; Eadington, 1991, 1995; von Herrmann, 2002, cited in Richards, 2010).

The history of gambling in the USA can be described in terms of four waves (Rose, 1986; McGowan, 1999). The first wave took place from colonial times to the middle of the nineteenth century when lotteries were used to raise revenue for state and local governments. The second wave occurred after the Civil War as southern states searched for funds to rebuild. The southern lotteries were starved when the U.S. government banned the use of the postal system for lottery sales in 1890. The third wave began in 1930s when Nevada legalized casino gambling and horse race tracks opened in various locations around the country, and continued into the 1980s as states adopted lotteries and other forms of lottery related gambling. The fourth wave witnessed numerous types of casinos being legalized, including casinos on riverboats, in historic mining towns in urban and suburban locations, and on Indian lands in the 1990s (Chhabra and Gursoy, 2007; Eadington, 1999). It is reported that the U.S. government legalized commercial gambling in 48 states (excluding Utah and Hawaii), and casino gambling can be operated in 26 states (National Gambling Impact Study Commission, 1999); Shaffer et al., 1997 cited in (Stitt, Nichols, and Giacopassi, 2005). The American Gaming Association reported that the Gross Gambling Revenue (GGR), i.e. the amount wagered minus the winning returned to players, grew from US$10 billion in 1982 to US$47 billion by 1996 (Eadington, 1999). By 1993, revenues from casino gambling exceeded those from lotteries.

The international spread of casino gambling surged in the 1960s through the mid-1970s, coinciding with the third wave. Nations that endorsed casino gambling were; Bulgaria (1965), South Korea (1967), Dominican Republic (1968), United Kingdom (1968), Australia (1972), Jamaica and Holland (1975), Guadeloupe, Luxembourg and Spain (1977), Slovakia (1984), Denmark (1990), Canada, St. Lucia, Peru and Vietnam (1990s), Greece (1994), and Macau (2002). Canadian casinos follow an urban monopoly casino model similar to Australia's, although ownership is by the government rather than the private sector (Eadington, 1999; Richards, 2010; Gambling Commission, 2015, UNLV, 2014a).

There is a growing debate on the contributions of casinos as attractions with the capacity to draw tourists and also local residents. Governments acknowledged the appeal of promoting casino tourism with improved tourism performance, higher tourism receipts and taxation revenue. It is estimated that the Asian region will see a significant rise in the number of new casinos as authorities from Punjab (India), Jakarta (Indonesia), Taiwan, Tokyo and Thailand are discussing liberalizing and legalizing casinos in an attempt to pursue casino tourism as a means to boost the tourism sector performance. However, the governments are also concerned with the effectiveness of regulatory policies on the gaming industry as casinos are evolving into more complex leisure products in which gambling is only one dimension of an overall experience designed to appeal to a broad market and also the commercial viability of casino tourism that requires careful planning and management of the gaming industry to maximize potential benefits and mitigate social costs of casino tourism. Numerous studies focused on the North America region and limited research on the Asian region. It will be useful to examine the state of gambling tourism in Singapore as the city-state launched the two IRs including the two casinos as it is important to consider both the positive and negative consequences of the IRs (Henderson, 2006).

2.4.2 Benefits of Casino Tourism

Researchers view Integrated Resort (IR) or casino tourism approaches from different perspectives. Some authors believe that IRs are well-planned and proactive tourism initiatives while others viewed IRs as merely reactive tourism strategies (Nunkoo and Ramkissoon, 2009). Governments and private developers are supportive of casino tourism as this leads to positive economic impacts such as employment, taxation revenue, and enhanced well-being of the local community. For example, researchers observed that Atlantic City legalized gambling and launched the first casino in 1978 and revived its economy successfully. It was reported by USA Today (2013) that Atlantic City received 30 million visitors in 2013 compared to only 7 million visitors in 1978, and the casinos also created 43,000 job opportunities in 2006 (Stansfield 1978; Israeli and Mehrez, 2000, Zheng, 2004; cited in Henderson, 2006; USA Today, 2013).

The gaming industry gained popularity particularly in North America because governments viewed casino gambling as an effective tourism development strategy by generating high tax revenue and boosting economic development projects. Raento (2000) found that the U.S. government viewed gaming operations as attractive strategic options as casino tourism can boost the economy, enhances a destination’s attractiveness, and higher taxation revenue can help to fund public education projects (Raento, 2000; cited in (Scott-Hallsell, Palakurthi, Dunn, and Saiprasert, 2010). MacLaurin and McLaurin (2003) noted that Canadian government gained more than $5 billion in profits as net revenue from national lotteries, video lottery terminals and casinos rose from $2.7 billion in 1990 to $9 billion in 2000. Gaming industry boosted employment opportunities by three-fold to 41,000 jobs in 2001 compared to 12,000 jobs in 1992.

Eadington (1998) found that the destination resort casino industry in Las Vegas is the largest and most dynamic of any casino industry in the world. Mega-casino complexes changed the face and image of Las Vegas from *gambling to casino entertainment* in the 1990s. The new casinos along the Las Vegas Strip that opened between 1989 and 1997-The Mirage, Excalibur, Treasure Island, MGM Grand, Luxor, Monte Carlo, and New York-accelerated Las Vegas along an unprecedented growth path and transition. By 1997, nearly 50 per cent of revenues accruing to the largest 19 casinos along the Las Vegas Strip came from non-gaming sources. The popularity of this approach is reflected by the fact that over 80 per cent of all the profits earned by more than 200 major casinos in Nevada in 1997 came from this clustering of mega-casino complexes (McGowan 1999; Rose 1986; cited in Richards, 2010; Christiansen, 1997; Eadington, 1998; cited in Eadington, 1999).

Vong (2009) observed that when Macau expanded its gaming entertainment industry in 2002, it's economy grew by 16.5 per cent compared to 6.7 per cent in Hong Kong (Census and Statistics Hong Kong). Gaming revenue reached US$7.1 billion resulting in Macau surpassing the Las Vegas Strip (US$6 billion) to become the top Gaming city in the world in 2006. Tax revenue made up 82 per cent of government revenue in Macau in 2008 (Li and Cheng, 2010; UNLV). Vong and McCartney (2005) noted that casino revenue enabled the government to fund public projects to enhance economic and social development in Macau. Visitor arrivals increased by 16 per cent from 18.7 million in 2005 to 21.7 million in 2009 (Table 4).

Table 4-Major economic and gaming indicators for Macau: 2005-2009

Indicators	**2005**	**2006**	**2007**	**2008**	**2009**
Real GDP growth rate (%)	6.7	16.5	26.0	12.9	1.3
Per Capita GDP (US$)	24,189	28,463	33,737	36,797	38,026
Unemployment rate (%)	4.1	3.8	3.1	3.0	3.6
Gaming revenue (US$ million)	5,891	7,190	10,480	13,728	15,047
Tourist arrivals ('000)	18,711.2	21,998.1	26,993.0	22,933.2	21,752.8

Note: GDP=gross domestic product / US$1=MOP8 as of 30 December 2010

Source: Gaming Inspection and Coordination Bureau Macau SAR

It is reported by DSEC (2015) that Macau benefitted from the successful casino tourism strategy based on lower unemployment rate and increase in gaming revenue. For example, the unemployment rate was only 1.8% and gaming revenue reached US$45.2 million in 2013, compared to 3.6% and gaming revenue was merely US$15 million. Refer to Table 5 for details.

Table 5-Major economic and gaming indicators for Macau: 2005-2009

Indicators	**2012**	**2013**	**2014**
Real GDP growth rate (%)	16.9	19.3	8.1
Per Capita GDP (US$)	75,455	86,447	89,189
Unemployment rate (%)	2.0	1.8	1.7
Gaming revenue (US$ million)	38,154	45,233	44,089

Tourist arrivals ('000)	28,082	29,324	31,525

Note: GDP=gross domestic product / US$1=MOP8

Source: DSEC (2015)

Not all destinations pursue a casino development strategy without questioning potential detrimental outcomes. For example, a study by the League of Women Voters in Hawaii emphasized the need to analyze the pros and cons of legalizing gambling and its implications to the community (Dursin, 1997). According to USA Today, cash-strapped Hawaii proposed the creation of a gambling casino in Waikiki to generate US$100 million and to create 4,000 new jobs to improve quality of life. However, the House leadership opposed the Senate Bill 1247 but lobbyist John Radcliffe believed that the casino idea would rise again if Hawaii's economy continued to deteriorate (Niesse, 2010; Hawaiireporter, 2011).

2.4.3 Social costs of Casino Tourism

Destination managers should not equate tourism growth with tourism success without evaluating the actual impacts of casino developments in addition to their contributions to the tourism industry. It appears that casino gambling is effective in promoting tourism and contributing to the economy, but some question the potential implications resulting from economic and social changes.

The social costs associated with casino gambling are well documented in the academic literature. As the number of gaming casinos increases, studies debating the social and economic impacts of gaming also escalate. Casino gambling can generate economic gains but such returns may be offset by financial costs, social costs and risk of commercial failure if casinos struggle to secure the desired volume of visitors. One study found that casinos in South Africa attracted more local residents than international tourists (Ahmed, Heller and Hughes, 1999; cited in Henderson, 2006). Pinge (2000a) observed that promoting casinos tourism resulted in a loss of AUS$32million and the equivalent of 237 full-time jobs from the rural community in Bendigo, Victoria. Beeton and Pinge (2003) suggest that local residents should participate in local tourism activities instead of suffering losses by patronizing casinos in Victoria (Pinge, 2000a; Beeton & Pinge, 2003). Grey (1995) found that after Atlantic City legalized gambling in 1970s, it experienced a 230 per cent increase in rates of crimes by 1995, compared to 15 per cent nationwide. Zipser (1995) argued that positive economic benefits are exaggerated and negative social and economic costs (addictive gambling, traffic congestion, lower job productivity) are understated (Grey, 1995; Zipser, 1995; cited in (Oddo, 1997). Stitt (2001) investigated the impact of casino gambling on crimes and quality of life in eight casino communities in the U.S. and found that not all communities experience the same ‘casino effect’ with crime rates and tourism statistics varying between communities. The attitudes and moral values of the communities had the strongest influence on their perception of casino gambling, with 59 per cent of respondents viewing casinos favourably in the community with perceptions of improved quality of life, economic growth and minimal effects on crimes. In contrast, a study of 7,010 adults in New Zealand found that local residents suffered poor health and lower quality of life due to high gambling losses (Lin, et al., 2010). It is difficult to generalize or replicate from community to community, and effects may be due to local conditions such as the economy, population, demographics, location of casino, police preparedness and casino regulations (Stitt, 2001).

Furlong (1998) studied casino gambling in American states and found a significant and negative relationship between job growth and casino legalization. This suggests that states with higher job growth were less likely to adopt casinos. Higher unemployment rates also have a statistically positive relationship with casino adoption at an international level. Berry and Berry (1990) and von Herrmann (1999, 2002) also found a statistically significant negative relationship between religiosity and the adoption of both lotteries and casinos. Israeli and Mehrez (2000) noted that the Israeli government appointed a committee to examine legalization of casino gambling and proposed legalization of casino gambling while safeguarding against problems associated with casino gambling. However, powerful religious groups opposed and blocked the establishment of a legal gaming industry in Israel (Berry & Berry, 1990; Furlong, 1998; Israeli and Mehrez 2000; von Herrmann, 1999, 2002; cited in Richard, 2010).

Smith, Schopflocher, el-Guebaly, Casey, Hodgins, Williams and Wood (2011) used a longitudinal panel study of gambling in Alberta known as the Leisure, Lifestyle Lifecycle Project (LLLP) to assess Albertans’ attitudes toward gambling in general, gambling in Alberta and government gambling policy. Evidence indicated that the local residents accepted gambling as a legitimate recreational activity and agreed with the view that people will find means to gamble even if it is illegal. There were concerns about widespread gambling being associated with increased crime and resort casinos, local casino table games, slot machines and casino gambling on the Internet were seen as hard-core gambling activities whereas, raffles, lotteries, pull tabs instant tickets, and traditional bingos were the least harmful gambling habits.

Other studies to understand locals’ perceptions and attitudes towards tourism development initiatives emphasized the importance of local residents’ support in the success of tourism development projects. Mansfield and Ginosar (1994) survey of residents in four tourist towns in

Israel reinforced the fact that participation by locals is vital for the successful and socially sustainable processes which maintains a high level of quality of life and standard of living. Sharma and Dyer (2009) surveyed residents to identify whether they receive social and economic benefits from tourism and if they prefer to remain or leave the Sunshine Coast. The findings are a follow-up from earlier studies by Caneday and Zeiger (1991) and Inbakaran and Jackson (2006) and established an association between residents' involvement in generating economic or social benefits and their attitudes for tourism.

Macau has grown to become an international casino gaming destination with 35 casinos established in 2013 compared to only 11 casinos in 2002. However, this rapid expansion posed three new challenges with respect to social and economic issues; a lack of qualified human resources to meet the high demand for staff in casinos; a higher inflation rate of 5.5 per cent in 2013 compared to 0.98 per cent in 2004, and higher crime rates (13,685 crimes were commited in 2013, an increase of 39.8 per cent versus 9,786 crimes in 2004). Macau's unemployment rate fell from 4.9 per cent in 2004 to 1.8 per cent in 2013. The booming gaming sector accounted for 23.5 per cent of the total workforce (staffingindustry, 2014). Table 6 presents the changes in social and economic indicators in Macau (DSEC and indexmundi.com).

Table 6-Changes in social and economic indicators in Macau

Year	Number of crime cases	Consumer Price Index	Annual Inflation rate (%)	Overall Unemployment rate (%)
2004	9,786	95.79	0.98	4.9
2005	Not available	100.00	4.40	4.2
2006	10,855	105.15	5.15	3.7
2007	12,921	111.01	5.57	3.1
2008	13,864	120.57	8.62	3.0
2009	12,406	121.98	1.17	3.6
2010	11,649	125.41	2.81	2.8
2011	12,512	132.68	5.80	2.6
2012	12,685	Not available	6.11	2.0
2013	13,685	Not available	5.50	1.8

Source: (DSEC & Indexmundi.com)

Researchers are often concerned with addictive gambling. The term refers to gambling behaviour which becomes severe affecting the person's financial and social well-being. Treatment is required to manage addictive gambling. Addictive or compulsive gambling can be harmful to the physical and emotional well-being of individuals and their families and is associated with a higher incidence of bankruptcy, suicide, divorce, and crime (Castellani, 2000; Raylu and Oei, 2002). Studies of addictive gambling indicate that at time casinos can undermine the quality of life of host communities and change attitudes over time (Castellani, 2000; Raylu and Oei, 2002; cited in Henderson, 2006).

2.4.4 Safeguard measures adopted by Singapore IRs

The tourism literature has emphasized the crucial role of government intervention in the gaming industry. For example, local and state governments in the U.S. implemented regulatory measures such as licenses, permits, limiting legal bets and development regulations (Long et al, 1994; Eadington, 1986, 1996; Pizam and Pokela, 1985; cited in (Perdue, Long, and Kang, 1999).

The Singapore government recognized the importance of regulatory measures and established the National Council on Problem Gambling (NCPG) in August 2005 to monitor and address problems associated with compulsive gambling. NCPG is using a Casino Exclusion policy as a social safeguard to stop local residents or foreigners living in Singapore who are compulsive gamblers and those with financial hardship from entering casinos in Singapore. According to NPCG, the number of people who are not allowed to enter Singapore's two casinos has reached 190,927 active self-exclusion orders comprised of 14,877 (local residents) and 176,050 (foreigners) as at 31 December 2014, compared to 175,680 (2013) and 47,178 (2011) and 2,500 (2010) placed under exclusion orders (NPCG, 2015; The Straits Times, 2013a; The Straits Times, 2013b; casinocitytimes, 2010). The casinos only admit individuals over 21 years of age and casino advertising in local mass media is prohibited. Regulations also stipulate that the total area of a casino should not exceed 5 per cent of the total premises in the IR.

2.5. Local Residents' Perceptions and Attitudes toward tourism development projects

Tourism scholars have classified residents' attitudes toward casino gaming according to three main benefit and cost domains: economic, sociocultural, and environmental (Dimanche and Speyrer, 1996; Ham et al., 2004; Perdue et al., 1999; Stokowski, 1996; Tosun, 2002; cited in Chhabra and Gursoy, 2007).

A review of the literature suggests that five theoretical frameworks have been applied in an attempt to understand and explain resident perceptions of IRs and the impact of casino gambling. These are Social Exchange theory (SET), Social Representation theory (SRT). Gambling Tourism Support Model (GTSM), Gambling Impact Perception Matrix (GIPM) and the Social Capital (SC) concept.

Five theoretical frameworks of destination development

2.5.1 Social Exchange Theory (SET)

Social Exchange Theory (SET) suggests that residents are likely to support tourism development if the perceived benefits outweigh the perceived costs. McGhee and Andereck (2004) found that residents who perceived themselves as benefitting from tourism are likely to view it positively, while residents who perceived themselves as incurring costs are likely to view tourism negatively. Gursoy and Rutherford (2004) indicated that these benefits and cost perceptions of impacts are not mutually exclusive as the perception of one impact factor would influence the perceptions of other impact factors (Gursoy and Rutherford, 2004; McGhee and Andereck, 2004 cited in Chhabra and Gursoy, 2007). Stitt, et al. (2005) analyzed the eight communities in Colorado and found that gamblers view casinos favourably as they benefit from the casinos unlike the non-gamblers. However, others argue that local residents are skeptical that having casinos can boost employment opportunities and improve their quality of life. Studies were not conclusive in identifying which demographic variables affect residents' perception but some argue that residents perceptions can be influenced by distance, type of tourism, area of residence, education background, length of residency and employment status (Chhabra and Gursoy, 2007; Sharma and Dyer, 2009).

2.5.2 Social Representation Theory (SRT)

Some researchers are concerned that SET as it is too macro-oriented and recommended the use of Social Representation Theory (SRT) which is micro-oriented in order to comprehend the local residents' attitudes and perceptions toward tourism projects. According to Moscovici, a social representation is understood as the collective collaboration "of a social object by the community for the purpose of behaving and communicating". Social representations are the shared beliefs and views of the community on public issues and topics such as unemployment, health, and more important, relevant to tourism studies. Social representations can exist in two forms – internally (within) and externally (outside) of individuals. Pearce (2009) emphasized that social representations shape the way communities view and behave towards the phenomenon of tourism (Moscovici, 1988; Pearce, 2009; Moscardo and Pearce, 2007; Quenza, 2005; Pearce, 2005; Howarth, 2005, cited in Pearce and Wu, 2012).

Social Representation Theory (SRT) refers to describing and understanding how and what people think in their ongoing everyday experiences and these ordinary views, cultures, values and attitudes shared within the community can greatly influence the attitudes, perceptions and support of the community towards tourism initiative (Billig,1993; Moscovici,1981; cited in (Pearce, Moscardo, and Ross, 1996). Wagner, Duveen, Jovchelovitch, Lorenzi-Cioldi, Farr, Markova and Rose (1999) describe social representations as the ensemble of thoughts and feelings being expressed in verbal and overt behaviour of actions which constitutes an object for a social group. SRT focuses on two elements; firstly, the knowledge produced by a community of people during social interaction and communication, and therefore expressive of identities, interests, history and culture. Secondly, it is concerned with understanding how people express identity, develop patterns of behaviour and engage with others.

The aggregated cost and benefits approach of perceptions of residents in SET focuses on only macro level indicators. SRT emphasizes that the perceptions, attitudes and behaviours are different within the community and it is important to consider the micro-level values, perceptions and resulting behaviours. Further studies found that the SRT's micro segmentation of variables within the community such as; race, educational attainment, annual household income can assist destination managers better understand the local residents' attitudes toward tourism development (Chhabra and Gursoy, 2007). A focus group study on citizens included professionals, manual workers, students, taxi drivers, policeman, and street children and discussed the situation in the streets and in political life in Brazil. The findings revealed the local people have developed fear, threat and individualism in the streets, and corruption, self-interest and individualism in politics. This study concluded that social representations are inseparable from the historical and cultural features of the society as the community lacked an identity and a sense of belonging in the world (Wagner et al., 1999). Further studies emphasized the powerful impact of social representations on how people shared the views and influenced their responses to community concerns. Social representations are highly relevant to casinos and IR as they characterize the local residents' lives and social worlds and affect support for the development and growth of the two IRs and tourism sector in Singapore.

2.5.3 Gambling Tourism Support Model (GTSM)

The Gambling Tourism Support Model (GTSM) combines the best of SET (personal benefits) and SRT (common views) to ensure destination managers fully understand the attitudes and perceptions of the residents and to facilitate sustainable and successful launching of casino development. Hence, the proposed GTSM model can be a useful reference to comprehend the local residents' perceptions and attitudes towards promoting IRs in Singapore and suggests that the level of residents' positive and negative perceptions is likely to influence their support/opposition for casino gambling development. The model also proposes that personal characteristics and race are likely to influence residents' perceptions and also likely to have a direct impact on support or opposition. The SET model classifies residents' positive and negative perceptions, and expected benefits from the tourism development. The SRT model focuses on common views across the resident demographic (age, gender), socioeconomic (education, annual household income), and race characteristics.

Researchers suggest destination managers consider applying a demographic approach using the Gambling Tourism Support Model (GTSM) by dividing the community into smaller segments based on race and educational background to understand local residents' perceptions and attitudes (Chhabra and Gursoy, 2007). This model assumes that race and education are reliable predictors, and residents are supportive of casino tourism if they are benefiting from the tourism project.

Samli (1995) argued that applying the GTSM model may develop a clearer picture of local residents' perceptions of cost and benefit factors and their support and/or opposition for casino gaming in the community. The model recognizes the existence within the community of differences in perceptions, attitudes and behaviours, and emphasizes differences and commonalities in micro-level values, perceptions and resulting behaviours. This view is reinforced by other studies that suggest residents' characteristics are likely to influence perceived impacts of gaming development (Samli, 1995; Perdue, et al., 1999; Lee, et al., 2003; Lee and Back, 2006; Stitt, et al., 2003; cited in Chhabra and Gursoy 2007). Chhabra and Gursoy (2007) examined the residents' attitudes and their opposition/support for a casino gaming development prior to the development of a casino in Black Hawk County of Iowa (United States). Data were collected through a multiple sampling technique which involved brief intercepts with self-administered questionnaires. The snow-ball method was used to locate additional subjects. The survey was distributed equally among the African American and White American population groups. Multiple regressions were used to examine the effect of variables used in the study on support for casino development while controlling for age, gender, income, and number of children in the household. The potential to list different social representation was represented by the educational attainment and the race variables. Social representations are about more than demographics. They focus on the community of views across demographic groups. SET was represented by the following scales: social benefits, social costs, economic benefits, economic costs, infrastructure benefits, infrastructure costs, and environment costs. Results revealed two findings; firstly, the African Americans in general agreed more with the benefits and disagreed more with the costs than the White Americans, and secondly, the

ANOVA tests indicated that the White Americans were more concerned with the three social costs items – borrowing money to gamble, divorce rates, and bankruptcies due to gambling.

2.5.4 Gaming Impact Perception Matrix (GIPM)

Vong and McCartney (2005) investigated Macau residents' perceptions of the impact of gaming development. The study aimed to understand the dimensionality of perceptions of gaming impact and differences among subgroups according to gender, age, income, educational background, and marital and family status. The study findings identified six factors: personal costs, community consolidation and improvement, environmental costs, community economic gains, social costs, and personal economic gains. These six factors bore characteristics of the three conventional impact dimensions documented in the literature: economic, social, and environmental. Results from the study could help gaming policy makers and other casino and tourism stakeholders to understand the perceived costs and benefits of residents regarding various dimensions of gaming impact. Table 7 list the dichotomies of gaming impact-perception dimensions.

Table 7: Dichotomies of Gaming Impact-Perception Dimensions

Dimension	**Impact-Perception Dichotomy**
Personal	Personal costs versus personal economic gains
Social	Social costs versus community economic gains
Environmental	Environmental costs versus community consolidation and improvement

The gaming-impact perception matrix (GIPM) consists of four quadrants that classify impact perceptions into four types: *high cost-high benefit, high cost-low benefit, low-cost-high benefit, and low cost-low benefit*. Correspondingly, clusters of respondents were located in their respective quadrants and labelled as reserved optimists, skeptics, optimists, and neutrals. This classification is similar to the three resident clusters: *enthusiasts*, *middle of the roaders*, and *somewhat irritated*, identified by Ryan and Montgomery (1994). This matrix could help authorities and casino operators label stakeholder groups at various stages of gaming development. Further breakdown of gaming perceptions into personal, social, and environmental dimensions facilitates interpretation of complex and multi-faceted variable such as perception. The use of matrix labelling and demographic profiling could assist marketers reinforced or altering perceptions of local residents or community organizations. The findings suggest that singles are 'reserved optimist' (perceived high benefits and high personal costs such as vulnerable to gambling addiction, both singles and married 'reserved optimist' as they are concerned with the high social costs as a result of promoting casino tourism. This matrix is aligned with SRT as it revealed the perception of local residents can assist destination managers to launch appropriate programs to educate and influence local residents' perception of casinos favourably, i.e. from 'reserved optimist' to 'optimist'. For example, casino operators can set up research funds in environmental studies to improve public image.

2.5.5 The Social Capital (SC) Concept

Academic literature suggests that to understand the social well-being of the local communities, it is useful to consider if tourism development has improved an individual's social relationships with others; that is their social capital. Social Capital is a multi-dimensional concept focusing on the nature and role of networks of people in communities that can affect one's quality of life. Bordieu (1986) applied social capital to examine social status and inequality, and found that some used social connections to maintain or improve their high social status as membership in a group provides each member a credential or collectively-owned capital. Being part of a network of connections produces useful relationships to secure material or symbolic profits (Bordieu, 1986; cited in Griswold and Nichols, 2006). McGehee, Lee, O'Bannon and Perdue (2010) analysed 307 tourism stakeholders in Virginia, U.S., and suggested the relationship between length of residence and tourism-related social capital as well as a relationship between tourism-related social capital and cultural capital (history, music, art and craft) political capital (strong political resources), private built capital (hotels, attractions, restaurants), and financial capital (financial support for tourism development).

Putnam (2000) applied social capital in the context of connections between individuals and networks, norms, and trust that arise from those connections. Social Capital is a networking process that translates into an individual's effectiveness in the community and workplace, and a resource that ties communities together. Putnam demonstrated that social capital is directly linked to an improved quality of life. Putnam's 14 indicators comprising social capital, six of which comes from the DDB Needham Life Styles survey. The fourteen indicators can be grouped into five categories; firstly, measures of community organizational life, secondly, measures of engagement in public affairs, thirdly, measures of community volunteerism, fourthly, measures of informal sociability, and lastly, measures of social trust.

There are several social capital indices built from survey data in the World Bank and several countries including the United Kingdom, Australia, United States, and New Zealand. Spellerberg (2001) of Statistics New Zealand proposed six categorization; (a) *trust* (self, others, trust and reciprocity), *civic engagement* (measures of who pays attention to international affairs and community, and attitudes to government and other social institutions), *participation* (trade unions, sports clubs, schools, service organizations), *voluntary activity* (volunteering, voluntary advice and formal positions), *giving* (social service activity, donation), and *meeting obligations* (socializing, contact with neighbours, help sick neighbours and friends).

The study by Griswold and Nichols (2006) observed that when a casino is located within 15 miles of a community, it is likely that social capital is reduced, evident in United States communities. The findings supported the work of Putnam (2000) and others in that a decline in social capital can be seen as a result of casino gambling. Eadington (1996) emphasized that the impact of casinos is primarily felt by the immediate surrounding area. Casinos are a double-edged sword as gambling can be a social activity that brings members of the community together and enhances social capital, but it can also erode social capital due to the social costs associated with casino gambling. The impact of the two casinos in the IRs in Singapore on the social capital and in turn the quality of life among the local people is clearly important as a research agenda item for this study (Putnam, 2000; Spellerberg, 2001; cited in Griswold and Nichols, 2006).

2.6 The Proposed Conceptual Framework

2.6.1 A Destination Competitiveness model for Singapore

This literature review has identified relevant research dealing with three issues; destination competitiveness, destination branding, destination choice and impacts of casino gambling on local communities. Destination competitiveness implies that a destination should attract tourist visit to boost the economy and also enhance the social welfare of local residents. With limited core resources and attractors, Singapore must rely on planning and implementing innovative destination policy such as IRs to enhance its appeal. STB should also share the tourism vision, and lead and coordinate the various stakeholders in developing and marketing Singapore as a vibrant and exciting destination. Destination image can enhance tourists' perceptions that Singapore is a must-see and worth repatronizing destination as it has a lot to offer to all visitors. Destination branding creates a unique identity for Singapore to differentiate itself from other destinations. Failure to understand the tourists' mindset will result in ineffective tourism strategies. It is vital to position Singapore favourably in the minds of tourists if motivation is to be translated into actual visitation. Finally, tourism studies suggests that when a tourist has a memorable and highly satisfied travel experience made possible by the coordinated efforts of tourism partners: - hotels, restaurants, coaches, travel operators, it can lead to a repeat choice behaviour and may spread positive word-of-mouth recommendations of the memorable travel to others (Valle, et al., 2007). This acquired knowledge can enable managers to make better informed destination marketing decisions to enhance Singapore's reputation as an attractive gaming destination and achieve sustainable competitive advantage. To achieve this, tourism in Singapore must be socially responsible and be proactive towards managing stakeholders. More specifically, Singapore has adopted the approach of boosting economic wealth and enhancing local residents' social well-being in an attempt to maintain its destination competitiveness on a sustainable basis (Pearce, et al., 1996). Fig. 7 illustrates Singapore's quest for promoting the IRs to boost tourism and economy, and also to maintain well-being of local residents in pursuing destination competitiveness.

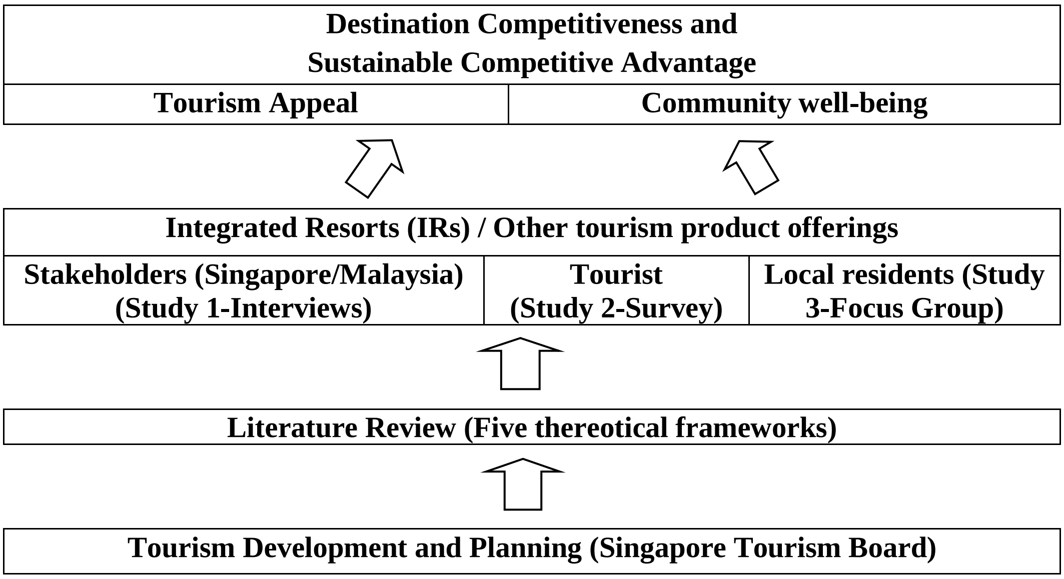


Figure 7 – Singapore's new destination competitiveness framework
(Source: adapted from Ritchie and Crouch, 2003)

2.7 Conceptual Framework

Maintaining destination competitiveness is a challenge for a destination such as Singapore with limited inherited or endowed resources, where sustainable competitiveness comes from creativity and innovation in developing the created resources and in the destination management function. The government should be looking beyond only economic gains by measuring the potential costs of this new tourism initiative. It would be naive to simply use higher tourism receipts and lower unemployment rates as adequate indicators of tourism success. There should be more research on assessing the impact of IRs on tourism destinations to determine whether or not they can provide a sustainable competitive advantage given the proliferation of casino development throughout the South East Asian region. The thesis uses the following three approaches to analyze if the two IRs can provide sustainable competitive advantage to Singapore as a tourism destination:

a) An exploration of stakeholder perceptions of the Singapore Tourism Board strategy to promote the Integrated Resorts as a Tourism Development Planning project vital to the success of destination Singapore (Study One - Chapter 3);

b) An investigation of tourist perceptions of the IRs and their contributions in enhancing Singapore's appeal as a tourism destination (Study Two – Chapter 4); and

c) An investigation of local resident perceptions of the two IRs and their impact on the community in Singapore (Study Three – Chapter 5).

Chapter 3

Stakeholder Perceptions of Tourism Development Planning in Singapore

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Chapter Outline

3.1 Introduction

There is a lack of research analysing the perceptions and attitudes of stakeholders towards tourism projects in Singapore. It is important to explore two aspects, if stakeholders were involved in the planning and implementation of the Singapore IRs, and also how stakeholders believe they can and should be involved in the future developments in the tourism industry of Singapore. The aims of this study are four-fold. Firstly, to determine whether the stakeholders perceive that the IRs are a successful tourism initiative and have contributed to the tourism industry in Singapore. Secondly, to explore how stakeholders perceive the role of IRs in enhancing the appeal and branding strategy of Singapore as a tourism destination. Thirdly, to consider how stakeholders' involvement in the planning and implementation can contribute to the development of IRs in Singapore. Fourthly, to investigate how effective crucial stakeholders perceive the IRs to be in enhancing and creating sustainable competitive advantage for Singapore as a tourism destination.

3.2 Methodology and Instrumentation

Researchers have adopted qualitative semi-structured interviews as a data collection methodology in investigating and understanding stakeholder's perceptions and attitudes towards the development of successful tourism projects. This qualitative approach provides in-depth insights about respondents' perceptions as interviewees can express their views and attitudes freely when they answer open-ended questions compared to other structured techniques. A number of previous studies support the approach. For example, Pechlaner, Herntrei, Pichler and

Volgger (2012) working in the South Tyrol, Italy concluded that successful destination management requires effective cooperation between public sector and private sector regional stakeholders. Hardy and Beeton (2001) interviewed 11 stakeholders and concluded that understanding stakeholders' perception is necessary in promoting sustainable tourism in the Daintree region of Far North Queensland, Australia. Alonso and Liu (2013) observed that four visitor centers were promoting emerging rural tourism effectively as they were actively involved with the communities in Blackwood River Valley, Western Australia. However, Komppula (2014) argued from interviews that the importance of DMOs in Finland was overly emphasized as small tourism enterprises could also contribute significantly towards promoting rural tourism successfully. Graci (2013) found that multi-stakeholder partnerships between the government, businesses, employees, tourists and the local community were necessary to implement effective sustainable tourism strategy in Gili Trawangan, Indonesia. Manyara and Ndivo (2015) also conducted semi-structured interviews to 35 respondents from the public sector, civil society, academia, and private sector and found that the participants perceived that promoting integrated regional framework in tourism development would enhance the destination competitiveness of IGAD (Inter-Government Authority on Development) region within Africa. Farmaki and Papatheodorou (2015) observed from interviews that industry stakeholders recognized the impact of Low-Cost-Carriers (LCCs) and tourism development in Cyprus.

The data collection method used for this study was based on qualitative semi-structured in-depth interviews. Semi-structured in-depth interviews were conducted with 40 respondents from the public and private sectors in the tourism and hospitality industry in Singapore and Malaysia from February 2013 - October 2013. To ensure good representation of industry views a total of seven categories of stakeholders were identified including; government, airlines, hotels, food and beverage, attractions, travel agents and business associations. Four methods were adopted in recruiting respondents – firstly, contacting potential participants directly by cold calls and/or emails, secondly, approaching participants at the PATA Hub City forum on 22 May 2013 at Marina Bay Sands Singapore, thirdly, a snowball sampling technique through respondents' recommendations and fourthly, using personal contacts. To ensure the validity and reliability of the interview questions, a pilot study was conducted with a senior academic staff at James Cook University Singapore (JCUS) prior to the actual study. The pilot test revealed the need to rearrange several questions to elicit more complete answers from stakeholders. Refer to Table 8 for a profile of the respondents.

Table 8: Profile of Respondents

Code	Category	Gender	Level	Code	Category	Gender	Level
1G	Government(MAS)	M	D	21AR	Attraction	F	D
2G	Government	M	M	22T	Travel Agent	F	GM
3G	Government	M	D	23T	Travel Agent	M	CEO
4G	Government	M	CEO	24T	Travel Agent	M	D
5G	Government	M	D	25T	Travel Agent	M	D
6A	Airline	M	GM	26T	Travel Agent	M	GM
7A	Airline	F	GM	27T	Travel Agent	F	GM
8A	Airline	F	M	28B	Travel Agent	M	GM
9H	Hotel	M	GM	29B	Business Association	M	D
10H	Hotel	M	D	30B	Business Association	M	CEO
11H	Hotel	M	D	31B	Business Association	F	D
12H	Hotel	F	D	32B	Business Association	F	D
13H	Hotel (MAS)	M	GM	33B	Business Association	F	D
14H	Hotel (MAS)	M	GM	34B	Business Association	M	CEO
15H	Hotel (MAS)	M	GM	35B	Business Association	F	D
16H	Hotel (MAS)	F	D	36B	Business Association	M	D
17FB	Food & Beverage	M	D	37B	Business Association (MAS)	M	D
18FB	Food & Beverage	M	D	38B	Business Association	M	D
19FB	Food & Beverage	M	D	39B	Business Association	M	D
20AR	Attraction	M	COO	40B	Business Association	M	D

Note: CEO=Chief Executive Officer, COO=Chief Operating Officer, GM=General Manager, D=Director, M=Manager

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3.3 Sample

There was a 55.5% response rate as 40 respondents participated out of the 72 contacts made. Of the 40 respondents, 36 (90%) were contacted using a snowballing technique and the remaining 4 (10%) respondents were personal contacts. Among the 40 respondents, 13 (32.5%) were from the ‘Associations’ category. Although there were only two participants in the ‘Attractions’ category, they represented the leading tourist attractions in Singapore – Jurong Bird Park, Night Safari, River Safari, Singapore Zoo, and the Singapore Flyer. Thirty-four (85 per cent) respondents were based in Singapore and the remaining six respondents were based in Central and Northern Malaysia abbreviated as (MAS). It is important to include stakeholders based in Malaysia as the Resorts World Sentosa (RWS) is owned by Genting Berhad, a Malaysia based organization and Malaysian tourists are also the third largest source of international visitors to Singapore. Face-to-face interviews were conducted at places of convenience for the respondents'- such as offices, cafeterias, hotel lobby, home residence, or JCUS meeting room. A detailed breakdown of the respondents and non-respondents is listed in Table 9.

Table 9: Respondents and Non-Respondents

Category of Respondents/Code	Number of Respondents	Percentage of total respondents	Number of non-respondents	Percentage of total non-respondents
Government (G)	5	12.5	7	21.8
Airlines (A)	3	7.5	2	6.2
Hotels (H)	8	20.0	3	9.4
Food & Beverage (FB)	3	7.5	4	12.5
Attractions (AR)	2	5.0	4	12.5
Travel Agents (T)	7	14.5	6	18.8
Business Associations (B)	12	30.0	6	18.8
Total	40	100.0	32	100.0

To achieve the four aims of this study, the interview guide consisted of four sections each comprised of five questions: (a) perceptions of the IRs and their success, (b) attitude towards Singapore's branding image, (c) perceived involvement in the decision making process associated with IRs development, and (d) long term views of Singapore as a tourist destination. Refer to Appendix 3-0. The duration of interviews ranged between 20 minutes to 45 minutes. All respondents signed the consent form prior to actual voice-recorded interviews. There were 39 voice-recorded interviewed as one interviewee did not agree to voice-recording and detailed notes were taken instead. The detailed notes were also vetted and confirmed by the respondent. The interviews were transcribed and a content analysis was used to draw valid inferences from transcript data and described views of stakeholders on the two IRs.

Content analysis is a research method that provides systematic and objective means to make valid inferences from verbal, visual or written data in order to describe and quantify specific phenomena (Downe-Wamboldt, 2009). It is a good research technique in analysing qualitative data by breaking text down into categories based on explicit rules of coding. Other researchers have also supported the view that computer assisted qualitative analysis can provide an objective, comprehensive and quantitatively derived framework (Krippendorff, 2004; Scott and Smith, 2005; Smith and Humphreys, 2006). There are three approaches in content analysis including; conventional, directed and summative. Hsieh and Shannon (2007) summarize the major coding differences in content analysis. Refer to Table 10.

Table 10: Major Coding Differences among three approaches to Content Analysis

Type of content analysis	Study starts with	Timing of defining codes or keywords	Sources of codes or keywords
Conventional	Observation	During data analysis	Data
Directed	Theory	Before and during data analysis	Theory/Research findings
Summative	Keywords	Before and during data analysis	Researchers' interest/ Literature review

For this study, content analysis was adopted as it provides knowledge and understanding of the impact of the IRs and tourist arrivals phenomena in the context of Singapore. To analyse and interpret the qualitative data from the interviews, concept maps were generated using the Leximancer software package which is similar to using Multidimensional Scaling Analysis. Angus-Leppan, et al (2010) list five key features of Leximancer Concept Maps as shown in Table 11:

Table 11: Key Features of Leximancer Concept Maps

Key features	Description
Themes	Concepts are clustered together and identified by themes. Themes are the highest level of abstraction generated by the analysis and provide a high level summary of the data. Themes are indicated by the large open circles on the concept map.
Concept frequency	The concepts are shown as solid circles within themes accompanied by a label. The concept labels range in colour from black to grey with darker text indicating that a greater number of blocks of text have been coded against that concept.
Concept centrality	The size of the circle provides some indication of the centrality, or connectedness of each concept. The more connected a concept is with other concepts, the more central it is. Similarly, frequently occurring concepts tend to be positioned nearer to the centre of the map and less frequently occurring ones are positioned towards the periphery.
Contextual similarity	The proximity of concepts indicates the extent to which two concepts appear in similar conceptual contexts. Concepts that are adjacent to each other are frequently found in the same block of text and/or co-occur with each.
Categorical data	The concept map can also include information on different categories. These categorical tags are positioned around the edges of the map. Categorical tags are positioned closer to concepts with which they have strong associations.

Source: Angus-Leppan, et al, 2010.

The concept maps are grouped similar concepts into themes. Some generic words were deleted as they were not meaningful, for example, time, course, thing, look, terms, things, and word variants such as IR and IRs, Destination and Place. Others were merged together including, Visitors and Tourists, Casino and Casinos, and Attraction and Attractions. Words found in the questions were also omitted, for example, Singapore, STB, IR, tourism, sustainable competitive advantage, collaboration, government, planning and implementation, challenges, and stakeholders. To ensure accuracy of the data collected from the interviews, a search query on key concepts was also applied to understand the content of each word. For example, what were their views on the word "attractions" when respondents were asked what factors would attract tourists to visit Singapore.

Bradley et al. (2007) summarizes the selected types of results from qualitative data analysis (Table 12).

Table 12: Selected types of results from Qualitative Data Analysis

Results	Definition	Application/Purpose
Taxonomy	Formal system for classifying multifaceted, complex phenomena according to a set of common conceptual domains and dimensions	Increase clarity in defining and comparing complex phenomena
Themes	Recurrent unifying concepts or statements about the subject of inquiry	Characterize experiences of individual participants by general insights from the whole of the data
Theory	A set of general propositions that help explain, predict, and interpret events or phenomena of interest	Identify possible levers for affecting specific outcomes; guide further examination of explicit hypotheses derived from theory

A grounded theory approach was applied to interpretation of the data given the limited academic literature and the theoretical frameworks available. In Chapter 2 of this thesis, several broad theoretical approaches were reviewed. These ideas are not, however, cast at the level of developing codes and were used more to interpret the data rather than guide the analysis of the interviews in this analysis. Grounded theory is a reliable specific research process as it adheres to five criteria; credibility, triangulation, transferability, dependability and confirmability. It consists of five phases; deciding on a research problem, framing the research question, data collection, data coding and analysis, and theory development. Fig. 8 is the flow chart adapted from Bitsch's Grounded theory flow chart (Bitsch, 2005).

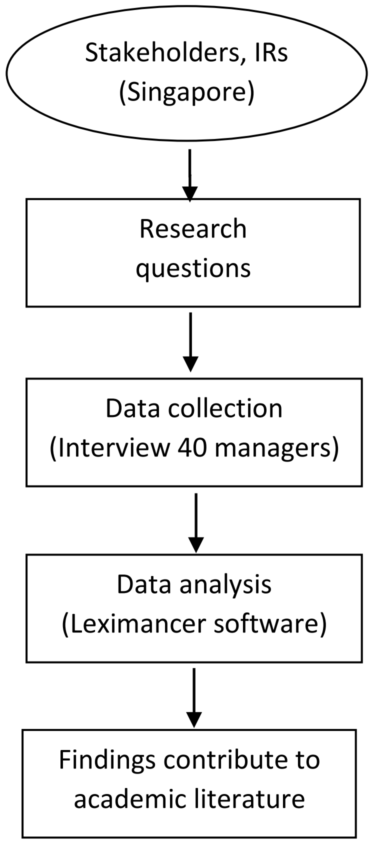


Fig. 8 Grounded theory flow chart (Adapted from Bitsch, 2005)

3.4 Results

3.4.1 Perceptions of Integrated Resorts and its success

Stakeholders were asked what factors attracted tourists to visit Singapore. The final list consisted of 16 major concepts. The overall key related concepts for this concept map were hub (99 counts, 100% connectivity), attractions (58 counts, 59% connectivity). The concepts with similar counts were destination and place (15 counts, 15% connectivity), city, tourism and shopping (14 counts, 14% connectivity), safe and casinos (12 counts, 12% connectivity), and attractive, location and food (10 counts, 10% connectivity). Other concepts were business (11 counts, 11% connectivity), natural (9 counts, 9% connectivity) and experience (7 counts, 7% connectivity). Refer to Appendices 3-1 (concept map) and 3-1A (key concepts) for further explanation.

'Hub' was the strongest factor with 99 counts and two other related factors associated were people (40 counts) and location (10 counts). To justify and link these results with the respondents, the coding system used in Table 9 is employed to identify respondent categories and demographics. Several stakeholders perceived that Singapore's strategic location made it an ideal hub for international travellers who use Singapore as a transit hub with good airport infrastructure and a gateway to Asia and rest of the world (6A, M; 8A, F; 9H, M; 38B, M). Singapore was also referred to as a financial hub (2G, M) and a tourism hub offering visitors shopping, and key attractions like the two IRs (20AR, M) and a variety of multi-cultural cuisines (30B, M; 10H, M) Here are some examples of statements from the respondents:

- *Singapore is a regional hub where tourism destinations are concerned. (38B, M);*
- *The government has been trying to make Singapore to be an air hub connecting people from all over the world-USA, Europe and Southeast Asia, Intra-Asia and everywhere (6A, M); and*
- *Singapore strives to be an international hub for financial coupling with research and industry, there is great interests from countries in America, Europe and Asia (2G, M).*

The next key factor (theme) identified by respondents was attractions (58 counts), which was closely associated with tourism (14 counts), casinos (12 counts) and natural (9 counts). Several respondents believed that tourists preferred to visit local key attractions including: Zoo, River Safari, Night Safari, Bird Park, F1 Grand Prix, Sentosa Island, Gardens by the Bay, Science Centre, high-end shopping, theme parks, and cultural visits to temples and mosques (15H, M; 16H, F; 8A, F; 11H, M; 23T, M; 24T, M; 25T, M; 20AR, M; 21AR, F; 29B, M; 19FB, M; and 3G, M). However, attractions like the museums and Clarke Quay were perceived to be less popular with tourists, according to a business associate (39B, M). According to two respondents, as Singapore lacks natural attractions (40B, F), it is important to be innovative in product development and launch new attractions (4G, M) and offer new experiences to tourists.

Respondents also perceived that tourists liked Singapore because it is a 'safe' (12 counts) place (15 counts) and a city (14 counts). Thirteen stakeholders agreed that the government made Singapore a safe destination and international visitors feel secure in the city and this created a strong and unique position in the mindset of a tourists when they are selecting a tourism destination (28T, M; 21AR, F; 3G, M; 9H, M; 10H, M; 14H, M; 15H, M; 29B, M; 30B, M; 32B, F; 33B, F; 34B, M; 35B, F). Some examples of statements on safety include:

- *Singapore is a modern city, safe and secure (34B, M);*
- *Your government is very efficient in administration and safety. (14H, M);*
- *I believe many tourists who come to Singapore for the comfort, safety and security (9H, M); and*

- *The government has taken steps to ensure the safety of the visitors (29B, M).*

Other key appealing factors identified by respondents as attracting international visitors to visit Singapore included: clean, political stability, English as a spoken language, good hotels, and that it is easy to travel in the city.

Stakeholders were asked if the two IRs have benefited Singapore overall. The final list consisted of 10 major concepts. MBS was the central them and key related concepts were casino (20 counts, 100% connectivity), tourists (17 counts, 85% connectivity), tourism (15 counts, 75% connectivity), different (12 counts, 60% connectivity), market (10 counts, 50% connectivity), attractions (9 counts, 45% connectivity), industry (8 counts, 40% connectivity), conferences (8 counts, 40% connectivity), social (8 counts, 40% connectivity), and workers (6 counts, 30% connectivity). Refer to Appendices 3-2 (concept map) and 3-2A (key concepts).

The word ‘casino’ (20 counts) was most frequently mentioned by the respondents. This suggested that the casino is the dominant perception associated with the IRs. They agreed that the casino tourism strategy was effective as the two IRs have benefited the tourism sector and the overall economy of Singapore. Some stakeholders (12H, F; 29B, M; 32B, F; 39B, M) explained that the casinos are the key attractions to international tourists including gambling tourists and high rollers as the casinos provide entertainment for visitors (2G, M; 19FB, M). The casinos were also crucial as they contributed in terms of gaming revenue to the two IRs, noted two respondents (22T, F; 40B, F). A business associate (30B, M) highlighted that the IR casinos have enhanced Singapore’s reputation as a gaming destination to compete against Monte Carlo and Las Vegas. Some of the statements on why Singapore is perceived as one of the leading casino tourism destinations included:

- *The IRs attract business tourists and high-rollers, people who love to gamble (12H, F);*
- *It draws the segment of tourists who are looking for enjoyment through gambling. (29B, M);*
- *The competitive landscape has changed and the image of casinos has changed too. It’s not just about gambling. It’s about world-class shows, world-class accommodation and dining (32B, F); and*
- *Singapore has provided the avenue and place to spend their time. These are the casino patrons (39B, M).*

One respondent (33B, F) believes that the two IRs have transformed Singapore into a vibrant leisure destination as MBS and RWS have become the newest iconic tourism attractions. In brief, they are powerful pull factors and marketing the two IRs has become synonymous with marketing destination Singapore. Others were delighted that the two IRs launched in 2010 ~~and~~ had revived the declining tourism sector as Singapore recorded higher tourist arrivals, especially inbound tourists from Indonesia, Thailand and Malaysia (14H, M) and such visitors had spent more (4G, M; 29B, M). The travel agency sector elaborated on the contributions of the IRs: firstly, superior tourism performance in visitor arrivals and tourism receipts, secondly, stronger economic performance and increased employment opportunities, thirdly, local attractions needed to upgrade and reinvent themselves to stay competitive, and finally, more business for taxi operators (24T, M; 25T, M; 26T, M). Examples of the statements made included:

- *The IRs have created thousands of jobs and attracted more tourist to visit Singapore (24T, M); and*
- *The IRs bring four key benefits to Singapore, firstly, economic benefits in higher tourist arrivals and job creation, secondly, the spin-off effect on supporting industries (taxi operators), thirdly, brighten up the entertainment scenes that included high profile internationally rated shows, and finally, the presence of excellent conference facilities to cater to the meetings and incentives markets (25T, M).*

However, several stakeholders (6A, M; 10H, M; 15H, M; 23T, M) were concerned with the 'social' (8 counts) costs associated with addictive gambling such as bankruptcies. The availability of jobs at the IRs attracted many foreign workers and this made it difficult for small-medium enterprise firms in recruiting these workers (17FB, M). One business associate (35B, F) added that environmental issues could also arise. Some of the statements on social costs included:

- *By cost, I am talking about social costs and cultural costs and it is debatable. Even Lee Kuan Yew was concerned on the cultural and social issues, less on the monetary issues (6A, M);*
- *Economically wise, yes. However, social wise, I feel it has not. For the locals, I do not see benefits for them (23T, M); and*
- *The downside is that not all lower end of population is in favour of the IRs as it leads to adverse perception by various religious groups. It also encourages people to gamble which can lead to higher crime rates (35B, F).*

Stakeholders were then asked about what they liked and disliked about the Integrated Resorts. Two dominant themes identified were MBS (34 counts, 87% connectivity) and RWS (23 counts, 59% connectivity). The final list consisted of 16 major concepts. MBS was the central theme and the overall related concepts were casino (39 counts, 100% connectivity), gambling (30 counts, 77% connectivity), dislike (20 counts, 51% connectivity), different (19 counts, 49% connectivity), shopping (18 counts, 46% connectivity), tourists (15 counts, 38% connectivity), attractions (14 counts, 36% connectivity), family (12 counts, 31% connectivity), locals (11 counts, 28% connectivity), social (11 counts, 28% connectivity), theme (10 counts, 26% connectivity), business (9 counts, 23% connectivity), hotel (9 counts, 23% connectivity), activities (8 counts, 21% connectivity), experience (7 counts, 18% connectivity), and unique (6 counts, 15% connectivity). Refer to Appendices 3-3 (concept map) and 3-3A (key concepts).

Several respondents acknowledged the IRs' positive impact on Singapore. According to two respondents (32B, F; 5G, M) since the two IRs were launched in 2010, Singapore enjoyed good performance in the tourism sector as the city-state welcomed more tourists and increase in tourism expenditure, there were more job opportunities created and also boosted the economy as a whole. This was attributed to the two IRs' excellent architecture, amenities, facilities and entertainment for both tourists and locals. For example, high-end shopping outlets including Louis Vuitton (7A, F), entertainment including ice-skating ring and musical shows, and convention centers (8A, F), good restaurants and food outlets at Malaysia Food Street in the RWS (25T, M) were identified by respondents. Some respondents identified that the Singapore IRs have unique features and specific target segments - Universal Studios (RWS) is targeted at leisure tourists and families (4G, M; 12H, F; 14H, M; 30B, M), whereas MBS has focused on promoting MICE tourism (22T, F; 27T, M) to business travellers. Some of the statements demonstrating favourable opinions included:

- *The IRs have created a lot of job opportunities for locals and foreigners. I must credit the IRs and the government for implementing the rules and regulations with regards to the casinos (5G, M);*
- *I think the IRs offers something very unique that you can only experience it in Singapore (37B, M); and*
- *I think the MBS is iconic in terms of its architecture and how it fits into the Singapore skyline (34B, M).*

There were three reasons identified by three respondents (10H, M; 16H; F; 24T, M) regarding their dislike of the IRs; casino gambling could lead to social costs, staff delivered poor service quality, and an inconsistent room allotment policy for travel operators. Firstly, it was suggested that addictive gambling could lead to social problems as low income earners also patronized the casinos on the belief that they could win money (24T, M). The government played a crucial role in regulating the casino industry to minimize negative impact of social costs, according to the hoteliers (10H, M; 16H; F). Other respondents believed that the IRs preferred gambling tourists and disappointed other visitors with poor service standards such as long waiting times (22T, F) and this could affect tourists' perceptions of local attractions. Thirdly, a lack of consistency in hotel room policy between the two IR operators was identified by a travel director (25T, M) who argued that he could only get room allotment and special tariff rates for travel agencies from RWS but not MBS.

Stakeholders were asked if they believed that the IRs have contributed to Singapore's 2015 goal to be an attractive tourist destination. There was no central theme and the concept 'IR' was omitted in the analysis. The final list consisted of 8 major concepts; tourists (24 counts, 100% connectivity), casino (13 counts, 54% connectivity), increase (11 counts, 46% connectivity), attraction (11 counts, 46% connectivity), destination (10 counts, 42% connectivity), hotels (7 counts, 29% connectivity), visit (6 counts, 25% connectivity), spend (6 counts, 25% connectivity), and gambling (5 counts, 21% connectivity). Refer to Appendices 3-4 (concept map) and 3-4A (key concepts).

The stakeholders have contrasting views as some agreed while others disagreed that the two IRs have contributed to making Singapore a more attractive tourism destination. The favourable respondents recognized the contributions of IRs with higher international tourist arrivals (3G, M; 25T, M; 29B, M) and increased length of stay (35B, F). Respondents felt that tourists preferred visiting the two IRs rather than the zoo or Sentosa Island (5G, M) as the IRs' all-inclusive concept enabled visitors to enjoy a theme park experience at the Universal Studios (14H, M), dining, entertainment, casinos (34B, M), and excellent conference facilities for business travellers (8A, F). Some travel operators and hotels incorporated MBS and RWS as part of their marketing collaterals when promoting to tourists, said hotel manager (10H, M). Some of the examples of statements include:

- *All these activities and facilities around the IR and Universal Studios have drawn in a lot of new and repeat tourists (8A, F);*
- *Based on increase in visitor arrival numbers, the two IRs have contributed to the success of the tourism industry (25T, M); and*

- *Many of the overseas travel agents bring businesses in terms of leisure tourists arriving in Singapore. A lot of them step up on their advertising and promotions using IR as the basis of their promotion so the numbers will increase (10H, M).*

Other respondents perceived that the IR casinos attracted tourists including high-yield gamblers and high-rollers. The casinos are perceived as attracting more visitors (10H, M; 13H, M; 32B, F; 38B, M) and this has contributed to Singapore's tourism goal of achieving 17 million visitors by 2015 (2G; M). According to a government representative (1G, M), Singapore has been promoting 'quality tourism' as the city-state preferred the high-yield tourist segment who could afford to spend more and stay longer.

Four stakeholders disagreed that the IR's are contributing to Tourism 2015 goal. It is their opinion that Singapore has other tourist attractions that appeal to international visitors (23T, M) such as Gardens by the Bay, Zoo and River Safari (12H, F), and the Singapore Grand Prix F1 (36B, M). Therefore, an airline manager (7A, F) questioned whether Singapore should continue to focus on promoting the two IRs and casino tourism to attract visitors, as this could make Singapore known as another gambling city like Macau.

Stakeholders were asked if they think that the IR was a successful tourism initiative by Singapore Tourism Board. There was no central theme as the focus was on the IR and the concept 'IR' was omitted in the analysis. The final list consisted of eight major concepts that were tourists (16 counts, 100% connectivity), attraction (15 counts,94% connectivity), government (9 counts, 56% connectivity), casino (7 counts, 44% connectivity), attract (6 counts, 38% connectivity), gambling (6 counts, 38% connectivity), different (4 counts, 25% connectivity), and products (3 counts, 19% connectivity). Refer to Appendices 3-5 (concept map) and 3-5A (key concepts).

As with the previous questions, there were two clusters of stakeholders – those who agreed that the IR's were a successful tourism project in terms of tourism performance and economic benefits and those who disagreed. Several respondents viewed the IR's as a successful tourism project based on stronger tourism performance and higher job opportunities in Singapore. The IRs were perceived to have enhanced Singapore's appeal as a tourism destination as visitors could enjoy a more vibrant tourism experience, attracted tourists from new markets according to (34B, M), rebranded Singapore as a leading MICE tourism destination (21AR, F), and boosted the Singapore's economy with higher income and increase in tax revenue, just like Genting Berhad, Malaysia, said hotelier (15H, M). Some of the examples of statements include:

- *STB should capitalize on the IRs as iconic attractions to tourists. I think it should also expand to other attractions like the Night Safari, Science Centre, Bird Park and museums. These are valid attractions for tourists (37B, M);*
- *Most of the tourists whom I spoke to come here every three of four years. If you visit the zoo once or twice you won't come back to Singapore to visit again (17B, M).*

Other stakeholders credited the excellent marketing strategies adopted by STB in promoting the two IRs successfully as Singapore's newest key attractions. It was recognized that the STB focused in promoting 'quality tourism' or high-spending tourists as they could spend more and stay longer in Singapore (29B, M) and participated regularly in key international tourism events such as ITCME, PATA, ATE (Australia), and AIM (8A, F).). A 5-star hotel director (12H, F) observed that the IRs are attracting tourists from different markets, including leisure tourists and gambling tourists. However, two respondents are cautious of STB placing too much emphasis on the IRs as a destination marketing tool, cautioning that STB should be driving total tourism experience for visitors as the IR's are just part of the attractions in Singapore (11H, M), and emphasizing that Singapore has more to offer with other attractions such as, River Safari, Science Centre, Bird Park, and Museums (37B, M).

Three stakeholders did not concur that the two IRs were a successful tourism initiative based on two factors. Firstly, the IRs have overstretched the capacity of Singapore's infrastructure (29B, M). Secondly, addictive gambling could lead to social costs such as debts and organized crimes (32B, F), and impact the local community negatively especially the lower-income residents (24T, M). Generally, though, the stakeholders acknowledged that the Singapore government's launch of the two IRs in 2010 addressed the issues of declining tourist arrivals between 2008 and 2009. The respondents recognized two positive contributions, firstly, enhancing the appeal of Singapore as a tourism destination which resulted in higher tourist arrivals and tourism receipts, and secondly, improved economic performance by creating more job opportunities and more businesses in Singapore. This concur with the views of some researchers that the casino tourism strategy was a reactive and effective option (Nunkoo and Ramkissoon, 2009; Raento, 2000).

Respondents also viewed that STB has been promoting the IRs as iconic tourism attractions in destination Singapore. The IRs are believed to appeal to tourists as they offer a unique tourism experience in deluxe accommodation, high-end shopping and fine dining, and international entertainment performances all within the premises. These key features are credited with enabling the IRs to attract different segments of tourists: leisure (RWS), business (MBS), and gamblers and high rollers from the region (casinos).

However, some stakeholders advised that Singapore should not over emphasize the two IRs and ignored the other tourism attractions as STB should promote attractions such as the River Safari, Gardens by the Bay, the zoo, Night Safari and Sentosa Island to attract more tourists. They also viewed that it was important that Singapore continued to host the Grand Prix night race beyond 2017 as this would put Singapore in the world map as this is a highly regarded world-class sporting event and a key attraction for tourists.

3.4.1.1 Integrative remarks

These observations, quotations and remarks from respondents can be brought together using some of the key theoretical ideas described in Chapter 2. For example, there appears to be a developing social representations that the IRs are very good for tourism and good for Singapore but may have some social problems. The generally good for Singapore social representation appears to be held across all respondents and is a uniform view typical of a hegemonic representation. There does not appear to be a clear and consistent alternative representation which could be called polemical and which directly challenges the mainstream view. Rather some social commentary and in the material built on the grounded theory that can be used to interpret the data gathered in this study to explore stakeholders' perceptions of STB's strategy to focus on using the IR as the driver of destination Singapore. The social exchange theory suggests that stakeholders are likely to be supportive of the IRs if they are benefiting from success of the IRs in reviving the tourism sector. The respondents perceived the benefits of the IRs such as; Singapore is a more vibrant destination, the iconic MBS and RWS are unique all-inclusive tourism products are boosting higher tourist arrivals and also creating more employment opportunities, and the casinos provide good entertainment for both business tourists and high-roller segments. There were concerns on the problems of addictive gambling that could result in social costs (bankruptcies, crimes). It is of relevance to identify common views as these representations can affect the success or failure of the two IRs.

3.4.2 Singapore's new brand image as a destination

Stakeholders were asked what they think STB's vision is in promoting Brand Singapore as a destination. Three key themes identified were Malaysia (12 counts, 67% connectivity), YourSingapore (11 counts, 61% connectivity), and Uniquely Singapore (9 counts, 50% connectivity). The final list consisted of six concepts. Malaysia was the central theme and related concepts were tourism (18 counts, 100% connectivity), food (11 counts, 61%

connectivity), unique (9 counts, 50% connectivity), business (8 counts, 44% connectivity), industry (6 counts, 33% connectivity) and different (5 counts, 28% connectivity). Refer to Appendices 3-6 (concept map) and 3-6A (key concepts).

The word ‘tourism’ (18 counts) was most frequently mentioned by respondents. The stakeholders identified that STB, the appointed government agency has been driving initiatives and developing the tourism sector in Singapore. Respondents from the hotel sector commented that the STB used different marketing slogans such as ‘Uniquely Singapore’ followed by ‘YourSingapore’ and rebranded Singapore to boost tourist arrivals (11H, M) and also noted that STB preferred to focus on ‘quality tourism’ (high-spender tourists) rather than ‘mass tourism’ (10H, M).

Travel agency operators highlighted that the tourists perceived brand Singapore as a dynamic and safe destination (25T, M; 27T, M). However, a business associate (30B, M) disliked the frequent rebranding campaigns by saying that changing the marketing tagline may confuse tourists on what brand Singapore represented, and he observed that other tourism destinations such as Malaysia, India and Thailand adopted a consistent branding tagline.

Other stakeholders have different views on STB’s vision in promoting Singapore as a tourism destination. For example, that STB promoted Singapore as a food, shopping (17FB, M), or multi-cultural (7A, F) destination to overseas markets. Some examples of statements included:

- *I think STB has done a very good job in promoting brand Singapore as a peaceful (safety and government stability), gastronomic (food), and exciting destination (nightlife) (29B, M);*
- *Singapore is going for high yield and quality visitors now. We are aware that if we continue to go for the mass market, it will put a heavier strain on the infrastructure and transportation system (31B, F);*
- *The vision of the STB is to provide a more holistic and sustainable business to the tourism sector and adopted flexible tourism packages to cater to different categories of tourists (2G, M);*
- *STB’s vision is projecting Singapore as a very energetic destination and appealing in terms of food and attractions (25T, M);*
- *STB promoted Singapore as a city with good food, multiracial, politically safe, fun and nightlife. I saw STB organized events overseas and presented operas, Indian dance, and cuisines with Michelin restaurants (7A, F);*

- *In New York, there was an exhibition on Singapore food and a road show in China (20AR, M); and*
- *In terms of business destination, I don't see many visitors. I cannot find anything unique other than shopping or food (17FB, M).*

Stakeholders were asked to identify the unique attributes of Singapore's brand. Three key themes identified were Thailand (6 counts, 23% connectivity), Indonesia (6 counts, 23% connectivity) and Malaysia (5 counts, 19% connectivity). The final list consisted of eight concepts. Thailand was the central theme and the related concepts are safe (26 counts, 100% connectivity), tourists (15 counts, 58% connectivity), culture (11 counts, 42% connectivity), clean (8 counts, 31% connectivity), infrastructure (7 counts, 27% connectivity), restaurants (6 counts, 23% connectivity), efficiency (5 counts, 19% connectivity) and traffic (4 counts, 15% connectivity). Refer to Appendices 3-7 (concept map) and 3-7A (key concepts).

The word 'safe' (26 counts) was perceived as the strongest attribute of brand Singapore. The respondents recognized the efficient government in enforcing strict regulations made Singapore a unique destination (8A, F; 23T, M) by ensuring strong political stability, safety and a 'clean' (8 counts) city for visitors (5G, M; 7A; F; 12H, M; 13H, M; 14H, M; 15H; M; 23T, M; 25T, M; 27T, M; 31B; M; 32B, M; 34B, M; 38B, M). Other key attributes identified were 'efficiency' (5 counts) in systems, development of good transportation and tourism 'infrastructure' (7 counts) in airport, airlines and hotels (1G, M; 6A, M; 7A, F; 18FB, M; 21AR, F; 26T, M; 30B, M; 38B, M; 39B, M; 40B, F).

Another key attribute identified by 12 respondents was 'food' (15 counts) and related concepts were 'culture' (11 counts) and 'restaurants' (6 counts). For example, it was suggested that tourists could choose from a wide variety of choices in food and drinks (16H, F) and attend food events like the Food Festival and World Gourmet Summit which helped to promote Singapore as a gastronomic destination (17FB, M). Some examples of statements included:

- *For the proposition of 'YourSingapore', the aim was to make tourists feel Singapore close to their heart and they could enjoy the unique attributes of Singapore in terms of good accommodation, attractions, service, service, transportation system, hospitality, food, and shopping under one roof. These unique attributes of Singapore brand made us different from Thailand, Indonesia and Malaysia (37B, M);*
- *When visitors come to Singapore they know that they can eat either at great restaurants or eat good local food, nice hotels and good clubs (22T, F);*

- *What I admire about Singapore is about the food. When people travel, they like to have good food. Singapore is also very safe. Taxis, walking on the street at night, you will be safe. Singapore is also very clean (13H, M);*
- *With these different cultures, we do have to offer on our social practices such as weddings, social interaction, tourists, cultures and food (36B, M); and*
- *Singapore is really a modern Asia. If you are a European tourist, you will want to see the different types of Asian cultures when you visit Southeast Asia countries like Thailand, Malaysia or Indonesia. (22T, F).*

Stakeholders were asked if they perceived that the IRs matched Singapore's current image as a destination. Two key themes identified were MBS (7 counts, 44% connectivity), and Sentosa (3 counts, 19% connectivity). The final list consisted of 12 concepts. MBS was the central theme and the related concepts were casino (16 counts, 100% connectivity), attractions (13 counts, 81% connectivity), people (9 counts, 56% connectivity), different (9 counts, 56% connectivity), locals (6 counts, 38% connectivity), service (6 counts, 38% connectivity), tourism (5 counts, 31% connectivity), shopping (3 counts, 19% connectivity), experience (3 counts, 19% connectivity), developing (3 counts, 19% connectivity), boost (3 counts, 19% connectivity), and resort (3 counts, 19% connectivity). Refer to Appendices 3-8 (concept map) and 3-8A (key concepts).

'Casino' (16 counts) was most frequently mentioned by the respondents and identified as one of the key features of the IRs. One respondent indicated that the IRs have enhanced Singapore's reputation as a high-end and casino destination (33B, F). Another respondent stated that it was fortunate that the government was aware of the dangers of addictive gambling and minimized problems of social costs through implementation of effective measures through self-control and education (8A, F) and this helped to maintain Singapore's destination image as a clean, fun and safe destination for visitors (3G, M; 25T, M).

'Attractions' (13 counts) was the next most frequently mentioned by respondents. Two respondents agreed that IRs as they believed that IRs matched the destination image of Singapore and have become iconic attractions because they are dynamic, stylish, vibrant (34B, M), and offer a total experience (11H, M) for tourists. Some examples of statements included:

- *If you are a gambler and want the casinos, it is there (40B, F);*
- *I always expected Singapore not to go into the casino business. Skyscrapers, theme park, yes, but the IR was very unique and unexpected (15H, M);*

- *I think so. It is not about casinos it is about entertainment. There are also shopping, restaurants and the Universal Studios. Overall, it brings up the image of Singapore as a tourist attraction (20AR, M);*
- *IR is the catalyst of tourism industry as it boosts the overall service standards and attractions in Singapore (37B, M); and*
- *The IR is a playground for the rich with entertainment, shopping, restaurants and nightlife for visitors (23T, M).*

However, six respondents did not agree that the IRs matched the current destination image of Singapore. Two business associates highlighted that the IRs attracted gamblers (17B, M) and this could change tourists' perceptions that Singapore was no longer a conservative Asian society (29B, M). Others were unsure if the IRs have boosted the brand and overall destination image of Singapore (24T, M; 7A, F) and a hotelier (15H, M) suggested that Singapore should focus on promoting theme parks to attract more tourists.

Stakeholders were asked about their perception of the impact of the IRs on Singapore's branding strategy relative to competitors. Four key themes identified were Malaysia (19 counts, 100% connectivity), Thailand (15 counts, 79% connectivity), Genting (9 counts, 47% connectivity) and Macau (8 counts, 42% connectivity). The final list consisted of 11 concepts. Malaysia was the central theme and the related concepts were casinos (16 counts, 84% connectivity), tourists (14 counts, 74% connectivity), tourism (10 counts, 53% connectivity), business (9 counts, 47% connectivity), destination (7 counts, 37% connectivity), image (7 counts, 37% connectivity), attractions (6 counts, 32% connectivity), market (5 counts, 26% connectivity), theme (5 counts, 26% connectivity), competitive (5 counts, 26% connectivity) and hotel (5 counts, 26% connectivity). Refer to Appendices 3-9 (concept map) and 3-9A (key concepts).

Some respondents agreed that the two IRs enhanced Singapore's branding strategy compared to competitors. The word 'casinos' (16 counts) was most frequently mentioned and was closely associated with 'tourists' (14 counts). Genting Highlands owned by Resorts World was identified as Singapore's closest competitor as both operators have casinos and theme parks (1G, M; 10H, M; 15H, M; 16H, F). Potential threats identified could come from Philippines and Vietnam as they were considering duplicating the successful IR model (22T, M). The IRs were perceived favourably as iconic tourism attractions (39B, M) that attracted tourists including high-yield segment (7A, F). Another interesting feature that was identified about the casinos was that customers' profiles are kept confidential and this policy appealed to tourists and gamblers from China, Malaysia and Thailand (24T, M). Some examples of statements included:

- *I don't think that Indonesia, world's largest Muslim population nation will emulate the IRs. Singapore would not do what Thailand is doing and I don't think Thailand will go into casinos as well. I think Genting is the biggest one (15H, M);*
- *Singapore has more integrated facilities compared to Genting. Genting would be the closest competitor in the region (16H, F);*
- *I think that Singapore's success has spurred its competition to rethink their strategies where they can the casinos as a promotion tool and it is possible to control the casinos and prevent high crimes as shown in Singapore (5G, M);*
- *IR has become the icon for Singapore's tourism industry and it actually stimulated other local attractions to be on par (37B, M);*
- *The IRs have improved the destination image of Singapore (1G, M);*
- *The two IRs are good enough to create its own branding and its own uniqueness that attracts the tourists' attention (11H, M); and*
- *The impact of the Singapore IRs kept their competitors on their toes as Singapore moved away from traditional thoughts and culture to fit into the dynamic tourism industry (2G, M)*

Other respondents (7A, F; 6A, M; 23T, M) disagreed that the IRs enhanced brand Singapore. For example, the two casinos lacked novelty and were unattractive to tourists from the U.S. and Europe (6A, M). Another airline manager (7A, F) was disappointed that STB overemphasized the IRs, ignoring tourist markets from Europe and Australia, and was not interested in fostering collaborative efforts with the airline sector. She added that the IRs resulted in a rise in accommodation and transportation costs and this may force tourists to visit Malaysia or Thailand instead.

Stakeholders were also asked whether the IRs contributed to enhancing Singapore's branding image in the perception of tourists. Four key themes identified were MBS (7 counts, 39% connectivity), RWS (6 counts, 33% connectivity), STB (5 counts, 28% connectivity) and Gardens (4 counts, 22% connectivity). The final list consisted of 11 concepts. MBS was the central theme and the related concepts were people (18 counts, 100% connectivity), attractions (11 counts, 61% connectivity), destination (10 counts, 56% connectivity), casinos (9 counts, 50% connectivity), hotels (6 counts, 33% connectivity), promote (6 counts, 33% connectivity), exciting (5 counts, 28% connectivity), place (5 counts, 28% connectivity), tourism (5 counts, 28%

connectivity), city (5 counts, 28% connectivity), and entertainment (3 counts, 17% connectivity). Refer to Appendices 3-10 (concept map) and 3-10A (key concepts).

The word 'people' (18 counts) was most frequently mentioned by respondents and refers to visitors and industry professionals. Several respondents perceived that the IRs enhanced the brand image of Singapore as a tourism destination, for example, they perceived brand Singapore as a vibrant, high-end and up-market tourism destination (2G, M; 11H, M; 25T, M) and this also boosted MICE tourism (4G, M; 12H, M). Some examples of statements included:

- *All Japanese tourists insisted on staying at MBS. 'Just Japan' is a special TV series filmed at the MBS casino (9H, M);*
- *Look at the lifestyle of people who want to enjoy good food, wine, entertainment, shows, casinos and branded hotels. All these contributed to the up-market image of Singapore (25T, M);*
- *Yes, the IRs enhanced Singapore's image as a tourist destination as it resulted in higher tourist arrivals and increase in tourists spending (28T, M);*
- *The IR will make Singapore a luxury destination and deliver quality experience (33B, F);*
- *STB is promoting the IRs as being part of the attractions in Singapore. It has been the driving success in terms of creating the Singapore brand. People are talking about MBS and RWS (11H, M); and*
- *It has attracted some tourists who came solely to visit the IRs as it is a must-see attraction (24T, M).*

Others disagreed that the IRs actually enhanced Singapore's brand image amongst visitors and argued that the IRs are a short-term casino tourism strategy (7A, F; 23T, M) attracting gamblers rather than the bulk leisure tourists who preferred attractions including Grand Prix F1, the Universal Studios, Gardens by the Bay, and River Safari (15H, M; 26T, M; 31B, M). Some examples of quotes include:

- *Singapore should be seen as a destination as people come here to enjoy themselves even if they did not visit the IR, hence the IR should not be used as branding (8A, F);*
- *If you want the IRs, you only get gamblers. We should have different segmentation to visit the shop outlets and zoo (7A, F);*
- *The IR is not the only way to enhance the image as it should include the culture, people, entertainment, and climate (3G, M);*

- *The Singapore brand is vibrant and people want to find out what lies in this cosmopolitan city as tourists are keen to visit theme park, theatre shows (2G, M); and*
- *We need to avoid over emphasizing on casinos as this could affect brand image of Singapore negatively (33B, F).*

Overall, the stakeholders perceived that the IRs were instrumental and created a cutting-edge destination branding strategy for Singapore in the competitive tourism industry. Several managers acknowledged STB's vision in focusing on quality tourism or high-yield tourists i.e. visitors who can afford to spend more and stay longer in Singapore. There is a perception amongst most of the stakeholders that STB has been promoting Singapore with unique attributes such as safe, modern, efficient, and multicultural to attract tourists to visit the city-state and that tourists would expect good entertainment, variety of cuisines, high-end shopping, and excellent conference facilities. Respondents preferred STB to adopt a consistent marketing slogan to establish a strong emotional bond and brand identity with the 'YourSingapore' marketing slogan. This perspective is consistent with research by Morgan et al (2003) which found that New Zealand's 'Pure brand campaign' was successful as the brand communicated was clear, consistent, quality and unique of a destination.

The majority of the respondents agreed that the IRs matched Singapore's current image as a destination. Fourteen respondents (70 per cent) felt that the IRs matched Singapore's destination image as they are appealing attractions that are unique, clean, fun, safe, food and shopping paradise. Findings from this study supported earlier studies by (Morgan et al, 2003; Murphy et al, 2007) that a destination with strong branding is more likely to establish an emotional relationship with tourists and this could lead to higher repeat visitor volume and gained a superior competitive advantage over other destinations.

3.4.2.1 Integrative remarks

The respondents shared their perceptions regarding Singapore's new brand image after the two IRs were launched in 2010, and these views are related to the theoretical concepts of SET and SRT presented in Chapter 2. Stakeholders are likely to be more supportive of the IRs if they benefitted from the tourism project (SET). They have been developing some positive hegemonic representations such as dynamic, safe, food, shopping and multicultural. The respondents perceived the cutting-edge IR strategy favourably as this new initiative has boosted Singapore's appeal as a modern and high-end tourism destination and they also did not view the two casinos negatively. Destination managers should identify and recognize these common views as these representations can influence the sustainability of the two IRs. Other social representations highlighted were the frequent changes in marketing slogan and over relying on aggressive casino tourism strategy could alter the brand image of Singapore as a tourism destination negatively.

3.4.3 Stakeholder Involvement in Planning and Implementation of the IRs

None of the 40 respondents asked in the survey had participated in the planning process and implementation of the IRs. The key theme identified was Integrated Resorts (5 counts, 100% connectivity). The final list consisted of six concepts. IR was the central theme and the related concepts were government (5 counts, 100% connectivity), opened (3 counts, 60% connectivity), feedback (3 counts, 60% connectivity), industry (3 counts, 60% connectivity), attractions (3 counts, 60% connectivity) and work (2 counts, 40% connectivity). Refer to Appendices 3-11 (concept map) and 3-11A (key concepts).

The word 'government' (5 counts) was most frequently mentioned. Several stakeholders emphasized that after Singapore legalized casino gambling in 2005, the government worked solely with government agencies in the entire planning process and in the launch of the two IRs and did not involve other private sector organizations or consult the general public's views. The main objectives of legalized casino gambling were to create employment opportunities and to improve the economy (10H, M) so it was not necessary to consult the general public. The government also invited Sentosa Corporation to be part of the selection and appointment of the IR operators (4G, M).

The words 'opened', 'feedback' and 'industry' each had 3 counts and were closely associated. A public sector manager provided customer service and interacted with the gamblers in the casino (2G, M). There were other stakeholders (attractions, travel operators and business associates) who were indirectly involved with contacts with the casino operators. The local attraction players were advised to upgrade their products and facilities during a dialogue session prior to the IRs being launched in 2010 (21AR, F). The potential casino operators also consulted the travel agencies to understand the tourism sector, customers' needs, and average selling rates as they hoped to get the industry support prior to submitting their tenders to the Singapore government (22T, F; 28T, M) and another travel agency director (24T, M) was a member of the National Council of Problem Gambling (NPCG) and addressed problems of addictive casino gambling from 2009-2011. The casino industry also engaged trainers to deliver staff training programs (36B, M). Some examples of their statements included:

- *At one time I think one year before the IRs were opened, they had a dialogue session with the Association of Attractions and gathered members' feedback and views on the new IRs and were urged to upgrade their product offerings and facilities. The planning of the IRs was purely undertaken by the government (21AR, F);*
- *I think STB was the only party and government bodies like URA, SLA and LTA. But trade, not really. They did not get feedback from us. I think the industry was not invited to do that (30B, M); and*
- *No, we were not involved with STB on the planning and implementation but the IRs did visit our office and shared their plans and hoped to get our support. We would give our support if you do win the tender and we will work with you. We met tenders including Kerzner International, Resorts World, and Sands Corporation. (22T, F.)*

Respondents were asked how stakeholders could contribute to the planning and development of the IRs. The key theme identified was Singapore (24 counts, 100% connectivity). The final list consisted of 12 concepts. Singapore was the central theme and related concepts were hotels (16 counts, 67% connectivity), government (13 counts, 54% connectivity), travel (11 counts, 46% connectivity), attractions (11 counts, 46% connectivity), business (10 counts, 42% connectivity), industry (10 counts, 42% connectivity), agents (9 counts, 38% connectivity), involved (9 counts, 38% connectivity), casino (9 counts, 38% connectivity), different (9 counts, 38% connectivity), tourism (8 counts, 33% connectivity), and promoting (6 counts, 25% connectivity). Refer to Appendices 3-12 (concept map) and 3-12A (key concepts).

The words 'hotels' (16 counts), 'government' (13 counts), 'travel' and 'attractions' (11 counts) were closely associated. The respondents preferred the government to work with other key stakeholders in the planning and development of the IRs. The government's rationale and launch of the IRs was to address the declined in tourism sector after the financial crisis in 2008 (8A, F; 9H, M) and believed that working solely with STB would achieve successful planning and implementation of the IRs. This implied that the IRs only need to consult with the government in planning and implementing marketing strategies and not with other stakeholders (26T, M). Two respondents from the public sector suggested that the government work with industry partners, for example, to collaborate with local attractions and to offer a total tourism experience for visitors. Instead, the IRs were not keen to have joint promotions and they also cannibalized sales volume of 'smaller' attractions such as Mint Museum, and Changi Chapel Museum (4G, M; 5G, M). Two business associates emphasized that the government should also gather community involvement and support so that the two IRs would enjoy sustainable success instead of ignoring feedback from the general public including NGOs and concerns from several religious groups regarding social costs related to addictive gambling (33B, F; 34B, M). Some examples of statements include:

- *RWS will tell you that this is the price of my ticket and I will not change it. I am wondering if the competitors such as The Marina, Pan Pacific and Ritz-Carlton should cooperate together to compete against MBS (26T, M);*
- *It is to work with the IRs and not see the IRs as competitors to challenge them in human resources and attractions (36B, M);*
- *There was one period when the government was open to public comments before the formal announcement of the IRs. But I don't think they had a meeting with the key stakeholders – industry partners (30B, M);*
- *Stakeholders should engage with the IRs, for example, organize periodic workshops to discuss how the IRs and stakeholders can work together to enhance the unique product offerings of Singapore (4G, M);*
- *There is community alienation and distrust as the community is not regarded as a key stakeholder. There is no community involvement and participation in the IRs and though Singapore is reaping economic and social benefits, there is no social capital. With more community involvement, I believe the IRs would be more successful (33B, F); and*
- *The IRs is part of the tourism supply-chain. The airline is the top of the supply-chain, followed by infrastructure such as Changi Airport, and good hotel accommodation. Tourists are here mainly for businesses, not leisure and the success cannot depend on the IRs alone (6A, M).*

Respondents were asked how stakeholders could be more involved in the planning and implementation of the IRs. Three key themes identified were Integrated Resorts (42 counts, 100% connectivity), Singapore (9 counts, 21% connectivity) and MBS (5 counts, 12% connectivity). The final list consisted of 15 concepts. Integrated Resorts was the central theme and the related concepts were people (23 counts, 55% connectivity), different (12 counts, 29% connectivity), feedback (11 counts, 26% connectivity), business (11 counts, 26% connectivity), work (11 counts, 26% connectivity), government (9 counts, 21% connectivity), travel (7 counts, 17% connectivity), tourists (7 counts, 17% connectivity), social (6 counts, 14% connectivity), operators (6 counts, 14% connectivity), gambling (6 counts, 14% connectivity), groups (5 counts, 12% connectivity), understand (5 counts, 12% connectivity), issues (4 counts, 10%

connectivity), and casino (4 counts, 10% connectivity). Refer to Appendices 3-13 (concept map) and 3-13A (key concepts).

The word ‘people’ (23 counts) is most frequently mentioned by respondents and refer to stakeholders including tourism industry partners, businessmen, gamblers, tourists and local residents. There were a total of nine recommendations made by the respondents. There were five suggestions proposed by respondents from the public sector on how stakeholders could be more involved in the planning and implementation of the IRs. Firstly, to consult the property developers and local residents regarding a potential third IR (3G, M), secondly, to develop a Singapore IR model for future research (2G, M), thirdly, to conduct surveys and discussions to identify tourist’s trends and preferences (4G, M), and fourthly, to maintain good contact between stakeholders for future planning and implementation of tourism projects (5G, M). Respondents from the hotel, travel agency, business associates and attractions sectors made four recommendations: firstly, to establish a new committee/council to discuss issues and facilitate communication (23T, M; 26T, M, 31B, F), secondly, they suggest that the IRs should cooperate with travel agencies, hotels, food and beverage operators, transport firms, shopping malls and incentive planners through sales and marketing campaigns to attract more tourists to Singapore on a long-term basis (24T, M; 25T, M; 21AR, 32B, F), thirdly, local residents to be part of the casino regulatory committee (34B, M), and fourthly, to restrict foreign ownership on the new and third IR (9H, M; 11H, M; 10H, M).

Respondents were asked about the type of collaboration was necessary between the government, STB and tourism partners in boosting the development of the IRs. There was no key theme identified and the final list consisted of 15 concepts that were people (16 counts, 100% connectivity), tourists (11 counts, 69% connectivity), industry (10 counts, 62% connectivity), attractions (9 counts, 56% connectivity), travel (9 counts, 56% connectivity), work (8 counts, 50% connectivity), destination (7 counts, 44% connectivity), market (6 counts, 38% connectivity), business (6 counts, 38% connectivity), visit (5 counts, 31% connectivity), different (5 counts, 31% connectivity), involved (5 counts, 31% connectivity), important (5 counts, 31% connectivity), players (4 counts, 25% connectivity), and strategic (4 counts, 25% connectivity). Refer to Appendices 3-14 (concept map) and 3-14A (key concepts).

The word ‘people’ (16 counts) was most frequently mentioned by respondents and refers to STB, tourism partners, tourists, and service staff. There were eight recommendations proposed by respondents regarding potential collaboration activities between the tripartite parties - government, STB and tourism partners to boost the IRs development in Singapore. Several business associates made four proposals: firstly, to establish a new committee to handle operational issues, secondly, to obtain the support of local community, thirdly, collaboration in terms of sharing information and knowledge, and fourthly, a successful tourism industry can have spillover effects to the transportation, education, and labour industries (32B, F; 34B, M; 37B, M; 39B, F). Two government representatives emphasized the importance of establishing a common goal for all parties to work towards enhancing Singapore as an attractive tourism destination, and that it was relevant to conduct research projects and analysed the impacts of IR in Singapore (2G, M; 3G, M). The travel agencies felt neglected and perceived that the IRs should recognize the importance of the travel operators and more conferences should take place among tripartite parties to discuss tourism industry development in Singapore (22T, F; 25T, M; 28T, M). Respondents from the airlines (6A, M; 7A, F; 8A, F), hotels (12H, F) and attractions (21AR, F) perceived that STB should launch joint-promotion campaigns in promoting destination Singapore. Other suggestions were developing innovative tourism initiatives (11H, M) and government’s effort in ensuring competitive hotel rates (18FB, M). Some examples of statements included:

- *There should be more strategic partnerships between the international government agencies, foreign government bodies and NGOs to enhance the attractiveness of Singapore as a tourism destination (24T, M);*
- *There was already collaboration between the government and STB prior to the development of the IRs. So STB can incorporate the IRs in their road shows and collaterals (35B, F);*
- *In Singapore it is very well-organized and at different levels between STB, IRs and operators as they are working in sales, branding, infrastructure, and investment (4G, M).*

Respondents were asked to discuss the challenges of creating collaboration between the government, STB and tourism partners in boosting the development of the IRs. There were no key themes identified and the final list consisted of 12 concepts; government (18 counts, 100% connectivity), business (11 counts, 61% connectivity), agencies (9 counts, 50% connectivity), benefit (8 counts, 44% connectivity), tourism (7 counts, 39% connectivity), different (6 counts, 33% connectivity), tourists (6 counts, 33% connectivity), work (6 counts, 33% connectivity), industry (6 counts, 33% connectivity), casinos (6 counts, 33% connectivity), destination (5 counts, 28% connectivity), and objectives (4 counts, 22% connectivity). Refer to Appendices 3-15 (concept map) and 3-15A (key concepts).

Several respondents have mixed views on the challenges associated with the tripartite collaboration between the three parties. The word 'government' (18 counts) was most frequently mentioned by respondents and associated with business (11 counts), agencies (9 counts), tourism (7 counts), casinos (6 counts), and objectives (4 counts). Those who were supportive of the IRs were mainly so because they benefited from this new initiative and vice versa. Some respondents perceived challenges as a result of tripartite collaboration between the government, STB and industry partners. First, it was perceived that the government is placing too much emphasis on the two IRs and ignoring industry needs and the potential of the IR's to lead to social problems due to addictive gambling (10H, M; 14H, M; 27T, M), secondly, higher tourist arrivals tend to benefit hotels partially owned by government linked agencies rather than the food and beverage and travel operators (29B, M; 39B, M), thirdly, conflicts in goals between public sector versus profit-oriented private sector (3G, M; 4G, M; 30B, M), next, increase competition and shortage of labour in the food and beverage sector (18FB, M), and fifthly, lack of communication and dialogues between STB and industry partners (22T, F; 31B, F). In addition, an attraction director (20AR, M) argued that the government should focus on promoting Singapore as a fun destination for leisure tourists and conventions of business travellers rather than casino tourism. One respondent (1G, M) added that he believed the government encouraged partnerships with hoteliers, transportation and service providers in promoting Singapore. Some of the examples of statements include:

- *I think the challenge is on the mandate of STB as it is not given the task to help the agents per se. It is charged with creating tourism business and linking Singapore to the desired destination. The challenge for the IRs will be long term problem. But short term it is a problem for travel agencies as they cannot benefit that much (25T, M);*
- *I think that all the stakeholders must have a clear direction and define their own objective. To get together, they must all agree and sit down together to see what is best to move forward (2G, M);*
- *There are two challenges – vested interests could result in conflict and confrontation, and confrontation could result in less than optimum decisions and delays in getting the project completed on schedule. (40B, F); and*
- *Both the STB and government must think like the private sector. A civil service, unbending attitude will not help (38B, M).*

Evidence suggests that the Singapore government placed great faith and pursued a casino tourism strategy to boost Singapore as a tourism destination but it did not involve direct and indirect stakeholders during the planning and implementation of the two resulting IRs. However, findings from research studies suggested that tourism projects were more likely to be successful and sustainable by involving stakeholders. Freeman (1984) defined stakeholder theory which suggests that all stakeholder groups should be involved in promoting and developing sustainable tourism products. A study by (Bryd et al, 2009) also found that effective communication between the destination management organizations and four stakeholder groups, i.e. local residents, entrepreneurs, tourists and government in North Carolina created a good tourism product and delivered memorable experience for tourists.

The stakeholders indicated that they would like to be involved in the planning and implementation of future tourism projects with the government and STB, if there are plans for a third IR. For example, the hoteliers commented that they want to be more involved in decision making process just like before and during the SARS period in 2003. The respondents agreed that STB emphasized on promoting Singapore F1 and the two IRs as their effective destination marketing campaigns. They also appreciated that the government and STB spearheaded the IRs and tourism partners to actively participate in joint marketing efforts and to improve the tourism product and deliver memorable experience for visitors. This would benefit the tourism industry and Singapore as an economy. They also hoped that all stakeholders can enjoy similar levels of benefits and felt that the STB should play a central role in resolving conflicts between government and industry partners.

3.4.3.1 Integrative remarks

The stakeholders were disappointed that the government did not involve them in the planning and implementation of the two IRs. The government worked closely with STB and other government agencies though there was dialogue session with the attractions sector. According to SET, the stakeholders would be less supportive unless they are benefitting from the tourism initiative. The common views highlighted were mistrust and lack of communication between the government and the tourism industry. There was government alienation from the community as it was not regarded as a key stakeholder. Another hegemonic representation indicated was that the stakeholders prefer the government to value the importance of collaborating with the tourism industry and also to regard the community as a key stakeholder as this would enhance the success and sustainability of new tourism project. The Academic literature suggests that a destination promoting a new tourism project needs the support of both the industry and also the local community. To fully comprehend the perceptions and attitudes of local residents on the two IRs, theoretical frameworks such as adopting the gambling tourism support model (GTSM) and segment the local residents based on race and educational background as the two key segmentation variables; analysing the personal, social, and environmental dimensions using the gaming impact perception matrix (GIPM) model can help managers influence local residents' perceptions favourably on tourism project; and also to consider social capital and the associated quality of life of the community.

3.4.4 Long term view of Singapore as a tourist destination

Respondents were asked if Singapore would be able to attract 17 million visitors by 2015. The key themes identified were China (6 counts, 43% connectivity) and STB (6 counts, 43% connectivity). The final list consisted of nine concepts; economic (14 counts, 100% connectivity), market (13 counts, 93% connectivity), achieve (12 counts, 86% connectivity), hotel (7 counts, 50% connectivity), rooms (6 counts, 43% connectivity), political (6 counts, 43% connectivity), attractions (6 counts, 43% connectivity), spend (6 counts, 43% connectivity), and traffic (5 counts, 36% connectivity). Refer to Appendices 3-16 (concept map) and 3-16A (key concepts).

The word 'market' (13 counts) was closely associated with 'achieve' (12 counts). Eight stakeholders believed that the tourism goal is attainable due to the following reasons; firstly, STB should adopt an effective destination marketing strategy by promoting attractive products, e.g. MICE, Cruise, and the IRs, secondly, competitive hotel tariffs, thirdly, strong performing regional economies and ASEAN open sky agreement will continue to boost tourist arrivals to Singapore (8A, F; 10H, M; 11H, M; 13H, M; 14H, M; 15H, M; 23T, M; 33B, F). Some of the examples of statements included:

- *We see that STB is driving tourism growth as there are more tourist arrivals to Singapore. I think attracting 17 million visitors is attainable and does not pose any tough challenges (11H,M);*
- *I think we are capable of achieving that target if STB continues to invest its efforts in its marketing, participate in trade events and bring in MICE, have enough hotel rooms and make sure we do not get too expensive (8A,F);*
- *The regional market is strong enough. Based on the government's resources, the target of 17 million is achievable (15H,M);*
- *You can come in by cruise liner and also by land transport through Malaysia. The infrastructure, hotels and new cruise terminal are ready and able to achieve the 17 million tourist target (10H,M);*
- *I think it is quite achievable. Without the IRs, I believe Singapore can still achieve this growth (15H,M);*

- *Yes I believe so. The growth rate has increase significantly with the introduction of the two IRs (35B,F);*
- *We can achieve because there is a great demand especially the tourism markets from India and China (29B,M); and*
- *With 20 percent increase in tourism traffic, Singapore will be able to achieve the target (13H,M).*

The word ‘economic’ (14 counts) was most frequently mentioned by respondents and closely associated with political (6 counts). The respondents highlighted that the external environment mainly the economic and political factors could impact Singapore success in attracting 17 million visitors by 2015. For example, travel operator (25T, M) mentioned that uncertain economic conditions of source tourism markets directly impact on tourist arrivals and tourism receipts in Singapore. Two airline managers (6A, M; 7A, F) agreed as the unstable economic conditions in the U.S. and Europe could dampen the airline sector as there would be fewer business travellers to Singapore. The other external factors such as terrorism acts and health issues like SARS (25T, M), environmental issues like snowstorm and earthquakes (40B, F) could adversely affect tourism traffic to Singapore. Some of the examples of statements included:

- *Economic cycles are getting shorter. Due to economic and environmental issues, Singapore is not likely to reach 17 million visitor arrivals (40B,F);*
- *I think right now our main target is from China so if the sector starts to slow down, maybe we can achieve 14-15 million visitors and not able to achieve the target of 17 million visitors (39B,M);*
- *From today’s newspaper, Lion Air signed a contract with Boeing, the airline hopes that the ASEAN Open sky agreement can be achieved by 2015 (25T,M);*
- *Singapore is dependent on external forces e.g. financial crisis may affect number of tourist arrivals. It all boils down to the health of the region Singapore is in, especially neighbouring countries (3G,M); and*
- *Whether we can achieve or not is not anybody’s control as they were political and economic factors. If the problem in Europe persisted, weak growth in U.S. economy, and reduction in tourism growth in China, then my answer is no (6A,M).*

Respondents were asked how the two IRs would perform after 10 years of casino license exclusiveness. Two key themes identified were Macau (10 counts, 71% connectivity), and MBS (8 counts, 57% connectivity). The final list consisted of 14 concepts. Macau was the central theme and the 14 related concepts were government (14 counts, 100% connectivity), competition (12 counts, 86% connectivity), license (10 counts, 71% connectivity), people (9 counts, 64% connectivity), market (9 counts, 64% connectivity), attractions (8 counts, 57% connectivity), gambling (7 counts, 50% connectivity), land (6 counts, 43% connectivity), junket (6 counts, 43% connectivity), players (5 counts, 36% connectivity), rules (4 counts, 29% connectivity), overseas (4 counts, 29% connectivity), social (4 counts, 29% connectivity), and traffic (3 counts, 21% connectivity). Refer to Appendices 3-17 (concept map) and 3-17A (key concepts).

The word 'government' (14 counts) was most frequently mentioned and closely associated with license (10 counts), attractions (8 counts), and land (6 counts). The respondents perceived that the Singapore government plays a critical role in ensuring the performance of the IRs when the casino exclusiveness has expired and there could be new competition if the government decided to issue a license to new casino operator in Singapore (25T, M). Other respondents favoured new casino operators in Singapore as they perceived competition would be good as the IRs would need to upgrade their tourism products, increase in customer volume and develop more attractions outside Sentosa (30B, M; 32B, F; 21AR, F). Hotelier (10H, M) suggested that the current IRs need to bring in high rollers from overseas to boost gaming revenue. A respondent from the public sector (2G, M) presumed that the two IRs could be persuading the government to grant them approval for more land to accommodate expansion of current facilities as the IRs need to upgrade and further investments were needed (19FB, M) to continue to be successful. However, having more IRs could lead to more social issues and it would be vital that the government imposed stricter regulations to minimize social problems in vice, prostitution and money laundering, according to one respondent (3G, M).

There were other respondents who perceived that new competition could hurt the financial performance of the two IRs. According to a business associate (40B, F), currently, the hotels and casinos in the IRs were profitable but Michelin restaurants were too costly and the Universal Studios could not rely solely on the local market. Hence if the government decided to allow new casino operators in Singapore, the two IRs would perform badly as the once novel IRs lose their appeal, and casino operators could resort to engage in price wars (33B, F) that could lower their profit margins (1G, M) and decrease in market shares (13H, M). A business associate (38B, M) argued that the two IRs revenue would decline by 20-30 per cent and the solution would be to introduce new attractions to compete with new players and to attract repeat visitors (27, M) to Singapore.

Several respondents believed that the government would not issue new casino licenses and would maintain status quo of two IRs (26T, M) to avoid complicating further social issues in

Singapore. An airline manager (6A, M) agreed that the local residents would not condone another casino operator or else Singapore could become another gambling city like Macau. Others (12H, F; 36B, M) argued that Singapore lacked the land space to be able to accommodate the third or fourth IRs. Some examples of statements included:

- *In my personal opinion, the casinos may have fair share of gambling tourists but local market would be normalized.(2G,M)*
- *It may boost tourist arrivals but the numbers may be divided among the casinos so marketing efforts is crucial.(16H,F)*
- *The casino vendors would be more aggressive in their marketing campaigns and that could lead to more social problems. However, if Singaporeans become more mature and able to control ourselves, coupled with government imposing proper check points and counselling services then the IRs would focus on attracting more tourists instead. (8A,F)*
- *It depends if China and Malaysia have future plans to build IRs and casinos then it posed serious threats to the IRs.(24T,M)*
- *With more competition, the IRs will lose its competitive advantage.(28T,M)*
- *Competition is good but it needs to be monitored by watchdog. As long competition benefitted the consumers and public, then it is good. I don't see any negative things will happen after 2016. We look at Macau, Vegas and Monte Carlo, the industry will progress itself.(37B,M)*

Respondents were asked if the IRs are crucial to Singapore's tourism industry. There was no major theme and the final list consisted of 14 concepts that were tourists (16 counts, 100% connectivity), people (12 counts, 75% connectivity), attractions (10 counts, 62% connectivity), business (7 counts, 44% connectivity), government (7 counts, 44% connectivity), attract (6 counts, 38% connectivity), work (4 counts, 25% connectivity), succeed (4 counts, 25% connectivity), boost (4 counts, 25% connectivity), arrivals (4 counts, 25% connectivity), strategy (4 counts, 25% connectivity), region (3 counts, 39% connectivity), financial (3 counts, 19% connectivity), and gaming (3 counts, 39% connectivity). Refer to Appendices 3-18 (concept map) and 3-18A (key concepts).

The word 'tourists' (16 counts) was most frequently mentioned and closely associated with 'attractions' (10 counts), 'attract' (6 counts), 'arrivals' (4 counts), 'strategy' (4 counts), and 'boost' (4 counts). Travel operators (24T, M; 25T, M) perceived that the two IRs were crucial to tourism sector based on their strong financial performance. This was attributed to STB's successful tourism strategies to attract both leisure and high-spending tourists (7A, F). Some examples of statements included:

- *Yes, I strongly believed that the IRs boosted the tourism industry and we should keep it (16H,F);*
- *The IRs have become part of the tourism offering and critical to the industry. Without the IRs, the impact would be felt in terms of revenue, number of visitors, and job losses (34B,M);*
- *We have witnessed a steady growth of more tourists visiting Singapore after the IRs were launched (24T,M);*
- *I think that regardless of the brand, the IRs are important and crucial to the tourism industry (25T,M);and*
- *Without IRs, it won't be the same. If there are no business travellers, you cut a huge chunk of tourism receipts. I think MICE tourists helped tourism sector and MNCs. Having Universal Studio gives Singapore a brand edge for few years (21AR,F).*

Several respondents disagreed that the IRs are crucial to Singapore's tourism industry. For example, a business associate (33B, F) believed that the IRs have boosted the tourism sector but only on a short-term basis and proposed that casino tourism was not a long-term strategy. Another business associate (30B, M) emphasized that tourism managers should focus on delivering a memorable experience for visitors. a travel operator perceived that Singapore is attracting tourists because of its strategic location and other appealing attractions (23T, M) and the IRs it should complement with other local attractions to enhance Singapore's appeal as a tourism destination (37B, M). Respondents from the hotel sector believed that Singapore should focus on promoting efficiency, affordability, safety (10H, M), efficient government and new facilities (14H, M) instead. Some examples of statements included:

- *We could have Disneyland instead of the casino and it works well for the family segment. I think we are targeting the business segment – wealthy businessmen from China. Whether the IR is crucial, I think it is still debatable (8A,F); and*
- *No. It adds to it but I would not use the word 'crucial'. We will survive without IR. I think the IRs is just one element. The whole strategy of Singapore does not hinge on just the IRs (6A,M).*

Respondents were asked if the IRs could provide sustainable competitive advantage for Singapore as a tourism destination. There was no central theme identified and the final list consisted of 11 concepts that were work (8 counts, 100% connectivity), industry (7 counts, 88% connectivity), attractions (7 counts, 88% connectivity), countries (7 counts, 88% connectivity), create (6 counts, 75% connectivity), tourists (6 counts, 75% connectivity), neighbours (5 counts, 62% connectivity), business (4 counts, 50% connectivity), gaming (3 counts, 38% connectivity), facilities (3 counts, 38% connectivity), and product (3 counts, 38% connectivity). Refer to Appendices 3-19 (concept map) and 3-19A (key concepts).

The word 'works' (8 counts) was most frequently mentioned and closely associated with 'industry' (7 counts), 'attractions' (7 counts), countries (7 countries), create (6 counts), gaming (3 counts), and product (3 counts). Some stakeholders viewed that the IRs would be able to provide sustainable competitive advantage for Singapore as a tourism destination. The Singapore IRs have gained worldwide recognition as they attracted the strong brands of Sands and Resorts World that boosted the MICE and leisure tourism, according to one respondent (4G, M). Other respondents indicated that the IRs and gaming industry have given fresh appeal to Sentosa (15H, M) as they have become the latest tourism attractions and continuous innovation in product development would create competitive advantage for Singapore (5G, M; 25T, M; 29B, M; 31B, F). Some examples of the statements include:

- *Yes, it has a significant impact on the tourism statistics. In fact, it adds a further attraction to international tourists. The IRs have made Singapore a very attractive tourism destination (24T,M);*
- *I think that the IRs have the capabilities to create new attractions to make themselves relevant and create competitive advantage in Singapore (25T,M);*
- *Yes, the IRs can create sustainable advantage as the IR is our unique selling point to international tourists (40B,F);and*
- *IR would help us to keep that competitive advantage as a tourism destination for the time being because we really need it and we know that this is the right product at the right time. So it's a very strategic decision for the next decade (33B,F).*

Other respondents disagreed that the IRs would give sustainable competitive advantage to Singapore if regional destinations duplicate the IR model. An attraction director (21AR, F) argued that Singapore should focus on four areas, political stability, boosting its tourism infrastructure by increasing hotel room inventory, fostering more collaborations between the IRs and tourism partners, and minimizing social evils associated with addictive gambling. There should be a strategic fit between the gaming industry and tourism sector in Singapore, according to another respondent (2G, M). The tourism sector is a service-oriented industry, and one hotel manager (9H, M) emphasized that STB should enhance high service quality by developing a qualified workforce. According to a travel operator (26T, M), the IR's are only one of the many components of Singapore's competitive advantage. The IRs may be appealing on a short-term basis but once other countries like Malaysia and Thailand were to duplicate and launch new IRs, the Singapore IRs would lose its competitive advantage (3G, M; 8A, F; 14H, M; 17FB, M; 23T, M). Some examples of the statements included:

- *I don't think it will be sustainable if regional countries are also considering sprouting up new IRs. If Johor Bahru set up an IR, it will draw traffic away from Singapore. Tourist always want to try something new (14H,M);*
- *Currently, yes. In the long-term, if neighbouring countries start to have their own IRs, Singapore will face tough competition. Our neighbouring countries have cheaper labour and lower business costs. Once the other countries set up IRs, the tourists would not come to Singapore (17FB,M);*
- *At this moment, yes. Long term, no. Neighbouring countries are building more casinos and theme parks. Singapore will not benefit in terms of their competitive advantage (3G,M); and*
- *No, there are other means. Continue to focus on the uniqueness of Singapore and having a good government. Continue to develop the attractions. Improvise with new ideas (29B,M).*

Respondents were asked whether the Singapore government should grant more casino licenses and built more IRs. Two key themes identified were Macau (8 counts, 44% connectivity) and Singaporeans (7 counts, 39% connectivity). The final list consisted of 11 concepts. Macau was the central theme and the related concepts were people (18 counts, 100% connectivity), social (16 counts, 89% connectivity), gambling (11 counts, 61% connectivity), space (8 counts, 44% connectivity), money (7 counts, 39% connectivity), business (7 counts, 39% connectivity), problems (6 counts, 33% connectivity), land (5 counts, 28% connectivity), world (4 counts, 22% connectivity), and tourism (4 counts, 22% connectivity). Refer to Appendices 3-20 (concept map) and 3-20A (key concepts).

The word 'people' (18 counts) was most frequently mentioned and closely associated with 'social' (16 counts), 'gambling' (11 counts), 'money' (7 counts), 'business' (7 counts), and 'problems' (6 counts). The respondents have mix views if the Singapore government should grant more casino licenses and built more IRs. Several respondents have favourable views that the government should allow more casino operators since the IR model was very successful and boosted the tourism industry. A hotel manager (10H, M) believed that it would be good to have the third IR solely owned by local residents since the two current casino operators are foreign entities. Business associate (38B, M) was supportive as competition would lead to improve standards in the gaming industry.

Two respondents (17FB, M; 34B, M) were supportive of the IRs but concerned with potential social evils and they proposed that the government should conduct studies to measure the social impact of the two IRs before deciding to issue new casino licenses or not. The Singapore government should manage the social issues as a result of the two IRs first before planning another new IR.

Other stakeholders were not supportive of more casino operators as they were concerned with the following issues, firstly, social costs associated with casino gambling (6A, M; 19FB, M; 27T, M; 35B, F; 37B, M), secondly, Singapore could become another gambling city like Macau (18FB, M; 33B, F), thirdly, limited resources like land constraint to accommodate another IR in Singapore (20AR, M; 36B,M; 40B, F), fourthly, it is good and sustainable that Singapore should have a small-size gaming industry with two IRs (2G, M; 5G, M; 22T, F; 26T, M; 17FB, M; 29B, M). Business associate (39G, M) liked the all-inclusive concept of accommodation, food and beverage and entertainment under one roof except the casinos and suggested if Singapore could have a new IR without casino instead.

Generally, the respondents were optimistic that Singapore could attract 17 million visitors by 2015 as the tourism sector has been performing well consistently after the IRs were launched in 2010. They viewed that the external variables and internal variables were instrumental to the success of achieving the targeted tourist arrivals. They were hopeful that the external variables, including political, economic and financial conditions in Europe and U.S. would stabilize as fluctuations in any of these variables would dampen the growth in tourism sector. The internal elements were important as effective destination marketing activities in promoting quality tourism must be supported by upgrading the tourism infrastructure to handle higher volumes of tourists in Singapore.

The stakeholders were also confident that the two IRs would continue to perform well even if the government decided to issue new licenses to potential casino players. Some of the stakeholders were in favour of the third or fourth IRs as competition would stimulate current IR operators to be innovative in launching new tourism products. Others were neutral as they believed the net gain of casino tourism could outweigh the social costs associated with casino gambling. However, most respondents were concerned with social costs as they prefer Singapore to be known as an appealing tourism destination rather than a gaming destination like Macau or Las Vegas. It was reported by DSEC that there were too many casinos in Macau resulted in higher crime rate of 39.8 per cent and higher inflation rate of 5.5 per cent in 2013, up from 0.98 per cent in 2004. Other studies also indicated that compulsive gambling could lead to higher bankruptcy, suicide, divorce and crime rates (Castellani, 2000; Raylu and Oei, 2002; cited in Henderson, 2006). Considering that Singapore is a small city-state, respondents suggested that to maintain its status quo of two IRs permit Singapore to enjoy tourism growth and to manage social costs.

They also agreed that IRs are relevant in creating a cutting-edge strategy for Singapore's tourism growth, however, some pointed out that Singapore is well-known for its strategic location, safety, infrastructure and has other key tourism attractions besides the IRs and casinos. It is acknowledged that the two IRs have attracted more visitors and boosted tourism receipts, however it may not be sustainable as other competitors can copy the same IR concept and the IR novelty idea wears off eventually.

3.4.4.1 Integrative remarks

The respondents shared the common views that Singapore is an attractive tourism destination but they were unsure if the city-state could achieve the target of 17 million visitor arrivals due to the uncontrollable external factors and volatile business environment. They were impressed with the two IRs as it boosted the appeal of Singapore but they prefer that the government would not invite a new casino operator as the polemical representations that the locals dislike the idea of a new casino operator and it could lead to severe social costs and hurt the destination brand image of Singapore. They also indicated that Singapore has other attractions and it would not be ideal to rely solely on the casino tourism strategy as other destinations are likely to duplicate the Singapore IR model. Both SET and SRT are of significant relevance to destination managers as they can affect the sustainability and long-term success of the IR and tourism sector in Singapore.

3.6 Chapter Summary

The grounded theory approach to this study was adopted to explore insights of stakeholders' perceptions of Singapore Tourism Board strategy in developing the IR as the key driver of destination Singapore. The study involved face-to-face interviews with 40 stakeholders who shared their attitudes and perceptions based on four key areas; firstly, if they perceived the IR as a successful tourism product, secondly, if the IR has rebranded destination image and branding of Singapore as a destination, thirdly, if they participated and involved in the planning and implementation of the IRs development, and finally, what are their long term views of Singapore as a tourist destination.

Firstly, the respondents viewed the IRs as a unique and successful tourism initiative by STB. They viewed the two IRs favourably as they were impressed with the higher tourist volumes of leisure tourists, business tourists, and gambling tourists after they were launched in 2010 as visitors were attracted to the novelty tourism product of an all-inclusive entertainment. The stakeholders also expressed their concerns regarding the social costs associated with addictive gambling, for example, people believed they could win money by patronizing the IR casinos (24T, M). Other social issues include; bankruptcies, divorce, and crime rates. The findings from this study are consistent with tourism researchers as they defined a successful tourism product like Singapore achieved destination competitiveness if it delivers a superior tourism experience and it also enhances social well-being of local residents (Dwyer and Kim, 2003; Gomezelj and Mihalic, 2008).

Secondly, in terms of destination branding of Singapore, most stakeholders perceived that STB (DMO) is successful in distinguishing Singapore from the competitive tourism landscape by promoting Singapore as a food, shopping and multicultural destination. The IRs have enhanced the destination image of Singapore as a shoppers' paradise which is consistent with Tak and Wan (2003)'s study rather than a cultural heritage destination. STB is focusing on promoting 'Quality Tourism' by targeting high-yield tourists to Singapore. The IRs have complemented STB's marketing approach as respondents perceived Singapore as a high-end, business tourism, and casino tourism destination. However, it remains to be seen if destination branding of Singapore has created a competitive advantage over other destinations (Morgan et al, 2003; Murphy et al, 2007). For example, respondent (30B, M) argued that STB changed destination Singapore's tagline from Uniquely Singapore (2004) and YourSingapore (2010) may not strengthen the brand image of the city-state. Other respondents raised their concerns as they were sceptical that the IRs have boosted destination brand image of Singapore (24T, M; 7A, F) as the city-state is attracting gambling tourist segment (17B, M). This could have a negative impact of other segments of tourists as they may no longer perceived Singapore as a conservative Asian society (29B, M) but a casino gambling destination.

Thirdly, the stakeholders lamented a lack of participation and involvement in the planning and implementation of the two IRs as the government worked with STB and other government agencies only. Several respondents highlighted that stronger collaboration between the government, STB and other stakeholders including industry players and community support can benefit Singapore as a sustainable tourism destination (4G, M; 5G, M; 33B, F; 34B, M). This finding is a key concern as academic literature indicated that tourism destinations should involve all stakeholders in the planning, development and implementation of tourism initiatives to achieve success on a sustainable basis (Braley, 2006; Bryd, et al, 2009). Balakrishan (2009) also argue that successful destination branding process requires all stakeholders to be involved.

Fourthly, some respondents believed STB's destination marketing efforts in promoting tourism attractions including the IRs may attract 17 million visitors to Singapore subjected to strong economic performances in sources of tourism markets. They were also concerned if the government allowed another new casino operator after 2016 to compete with the existing two IRs could have its pros (innovative tourism products, more attractions and increase in customer volumes) and cons (more social evils). This is consistent with (Crouch and Ritchie 1999)'s destination competitiveness framework suggests that the global macro environment and competitive micro environments are key external forces affecting the destination competitiveness of tourism destinations.

In terms of the theoretical perspectives noted in Chapter 2, the following integrative overview of the work can be suggested. For social exchange theory (SET), the stakeholders are more likely to support the two IRs if they perceived the benefits such as stronger tourism sector performance and economic benefits outweigh the perceived social implications associated with addictive casino gambling. For social representation theory (SRT), the social representations shape the way the stakeholders and local communities in Singapore view and behave towards the two IRs. This is on significant relevance to the two IRs as the social representations can affect the support for this new tourism initiative in Singapore. For the gambling tourism support model (GTSM), it combined the personal benefits of SET and the social representations of SRT and indicated that the stakeholders will be supportive of casino tourism if they are benefiting from the two IRs.

Having discussed the perceptions of stakeholders in Singapore and Malaysia, it will be of relevance to conduct a study to interpret and understand the international visitors to Singapore on what they perceived of the two IRs and if they have enhanced the appeal of Singapore as a tourism destination. This will be elaborated in Chapter 4.

Chapter 4
Tourist perceptions of the IRs

Chapter Outline

4.1 Introduction

In this chapter, the focus is to identify and understand the perceptions and attitudes of another key stakeholder – international visitors to Singapore. Echtner and Ritchie (1991) emphasized the importance of understanding the perceptions of various tourist segments. This can be achieved by conducting a survey on tourists' perceptions of Singapore especially after the IRs launched in 2010 sparked a high growth in tourist arrivals. Have the perceptions of international visitors to Singapore been enhanced solely because of MBS and RWS?

Ritchie and Crouch (2003) suggest that creating a unique brand identity is crucial as it enables a tourism destination to distinguish itself from other competing destinations. Ekinci (2003) added that consumers are more likely to visit a destination if the specific destination personality matches one's own unique identity. Others emphasized that destination branding is important as it can foster stronger emotional attachment with international visitors and lead to actual visitation and repeat visitation and creates a competitive advantage (Morgan et al, 2003; Murphy et al, 2007). It will be important to identify if the IRs have created a unique brand identity for Singapore. How do tourists perceive the brand personality of Singapore? Equally important, if the perceived brand identity matches the visitors' ideal personality then it is likely to boost actual visitation and repeat visitation. Do the tourists perceive that the IRs have enhanced destination branding of Singapore? If the IRs have boosted the destination brand image it can also create a competitive advantage for Singapore relative to regional competitors.

4.2 Methodology and Instrumentation

This study adopted a quantitative research approach in which a self-completion survey was conducted with a total of 469 overseas visitors to Singapore. The self-administered survey methodology has also been applied in other destinations including Turkey (Bahar and Kozak, 2007), Slovenia (Gomezelj and Mihalic, 2008), Vietnam (Khuong and Ha, 2014). The survey questionnaire used a mix of structured and open-ended questions. The aim of this survey was to measure the perceived brand personality of Singapore as a tourism destination and whether the development of IRs is consistent with tourists' perceptions and images of Singapore. The research findings can be compared to previous studies on understanding perceptions of gambling tourists and non-gambling tourists on casino destinations (Moufakkr, et al, 2004; Kneesel, et al, 2009). A study by Crouch (2011) identified 36 determinant attributes of destination competitiveness that destination marketers can use to enhance the appeal of a tourism destination though it lacks in natural endowments. This framework is relevant to Singapore, a destination with limited resources. The implications of this study will be built on comparisons with Crouch's work.

The survey structure can be divided into different sections, firstly, tourists' perception of current and previous visits (Questions 1-6), secondly, sources of travel information (Question 7), thirdly, attractions and tourism experience (Questions 8-15), fourthly, destination image and attractiveness of Singapore and other destinations (Questions 16-18); fifthly, future scenarios of Singapore Tourism in 2025 (Question 19); and lastly, the profile of tourists (Questions 20-27). Questions 1-6 focused on identifying tourist characteristics: the first-timer, visit purpose, free independent traveller or group package tourists, the duration of trip and if the tourists are visiting other regional destinations. Question 7 required the respondents to indicate their sources of travel information to Singapore. Respondents were asked to identify the tourism attractions that they had visited or planned to visit when they answered question 8. Next, to understand if respondents agreed that the two IRs – MBS and RWS enhanced destination image (Question 9) and consistency with expectations of tourism experience (Question 10) of Singapore were asked. Questions 11-13 measured respondents' satisfaction with their overall tourism experience, if they would recommend the destination to others, and also if they would revisit Singapore within the next 12 months. Questions 14 and 15 were open-ended questions as respondents were required to list two best aspects of the destination and two features Singapore could improve.

Question 16 focused on identifying the attractiveness of Singapore as a tourism destination. The researcher developed a list of 43 literature-based destination attributes based on the 36 destination attributes identified by (Crouch, 2011) and Kneesel et al. (2009). The survey aimed to measure the perceived brand personality of Singapore as a tourism destination and whether the development of IRs is consistent with tourists' perceptions and images of Singapore. Question 17 required the respondents to rate and compare the attractiveness of Singapore with 20 other tourism destinations selected from the top 100 city destination ranking in 2010 by EuroMonitor International including Hong Kong (top city), Singapore (second best), Macau (fourth) and Bangkok (fifth). The other four including Genting Highlands and Phnom Penh which are promoting casino tourism whereas Penang is known as the food capital of Malaysia according to Malaysia Tourism Guide. There were three reasons to justify the need to include Johor Bahru, a popular leisure destination (Legoland Malaysia) and medical tourism destination (Malaysia as a medical tourism hub). Firstly, the Legoland Malaysia theme park opened in September 2012, the first in Asia is situated in Nusajaya, Johor. It is a fascinating theme park for children and adults alike as it offers themed areas of attractions including the Hello Kitty Town live performance, Miniland, and Water Park. Secondly, a study by Zubidah, Yusoff and Zahari (2013) examined the potential of promoting Johor as a medical tourism destination using modified SERVQUAL to measure medical quality. In a recent interview by (THE STAR, 2016) with Datuk Tee Siew Kiong, Tourism, Domestic Trade and Consumerism committee chairman on 23 February, Datuk Tee highlighted that "Johor tourism continued to boom as tourist arrivals hit 6.42 million in 2015 compared to 3.7 million in 2011. There are three factors, firstly, the weakened Malaysia ringgit currency also helped to make hotel rates in Johor value-for-money as a one night stay in Singapore is now equivalent to three-day stay in Johor for the same level of service. Secondly, the Federal government allowed China tourist visa exemption also drew more Chinese visitors especially when they visited Singapore. Thirdly, tour companies in Johor can promote tourist packages where visitors can enter Johor via the train service and tour buses from Singapore." It did not come as a surprise when three hotel managers mentioned Johor Bahru as a competitor during the interviews. For example, respondent (14H, M) highlighted that Johor Bahru is a competitor as it has an international airport and Legoland theme park, and also there were discussions to launch a new Universal Studios in Johor as well. A hotel director (10H, M) pointed out that the two casinos are aggressive in marketing and organize coaches to ferry customers to patronize their casinos. Respondent (13H, M) cautioned that social problems due to addictive gambling could affect both Singapore and Johor Bahru. Question 18 required the respondents to choose three destination personality descriptors for Singapore and three other tourism destinations from the twenty destinations given in Question 1. The full list of destinations is listed subsequently.

Question 19 was used to determine the respondents' future views of Singapore Tourism in 2025 and to indicate which of the six future tourism scenarios was the most appealing to tourists. To decide on the six future tourism scenarios of Singapore, the investigator referred to the following sources from both public sector and private sector in Singapore. For scenario A-Singapore: The Garden-sustainable urban living, was developed based on the Sustainable Blueprint 2015 published by the Ministry of the Environment and Water Resources in 2013 which outlined the national vision and plans for a more liveable and sustainable Singapore to overcome the issues of land constraints and high density in the city-state. The government published the *Population White Paper: A Sustainable Population for a dynamic Singapore* to address the demographic challenges facing the city-state as the population size was projected to be between 6.5-6.9 million by 2030. One of the key proposals is to develop Singapore as 'A City in a Garden' as the city-state is well-known as a green and urbanized city. Singapore aims to develop parks of around 0.8ha per 1,000 residents and 85 percent of local residents and their families can live within 400meters of a park by 2030. By 2020, Singapore will have 360 kilometres of park connectors compared to 200kilometers in 2013. The Jurong Lake Park will be redeveloped as a Destination Park and residents can enjoy a variety of recreational activities. For the other five scenarios, the ideas were adopted from Singapore Tourism Board corporate website on promoting tourism and hospitality sectors. The Singapore Tourism Board focuses on injecting vibrancy and excitement in the following industries; *Arts and Entertainment* and offer diverse live music scene and award-winning clubs to boost nightlife in Singapore, new and exciting *Attractions* such as Singapore Flyer, Universal Studios Singapore, and Gardens by the Bay; *Dining and Retail* by inviting renowned Michelin restaurants to Singapore; *Medical Travel* by positioning Singapore as Asia's leading destination for advanced medical care; industry development, capability enhancement, and the regulation of *Hotels*, Integrated Resorts, *Sports*, and *Meetings, Incentives, Travel, Conferences and Exhibitions* (MEWR, 2014; MND, 2013; MTI, 2011; STB, 2015; URA, 2012, 2013; . The six future tourism scenarios identified in the study were: Scenario A-The Garden-sustainable urban living; Scenario B-Family-oriented wonderland; Scenario C-Melting Pot of Asia-A hybrid of Asian Culture; Scenario D-Vibrant tropical city; Scenario E-Medical and Wellness tourism-healthcare hub of Asia Pacific, and Scenario 6-Sporting hub of Asia Pacific.

Prior to the actual survey, a pilot study was conducted to validate the relevance and clarity of the questions and to allow suggestions to improve the questionnaire. A total of 33 James Cook University, Singapore (JCUS) students completed the survey forms, 30 in the English language and three in 'Chinese translated' version in November 2013. Feedback received from the pilot study indicated that the questions were detailed and interesting though there were several students who commented that survey was too lengthy as students took between 15-25 minutes to complete the survey. A detailed questionnaire on international visitors was important as the researcher needed to collect useful data regarding destination attributes and destination branding of Singapore. For Question 16, the researcher added the words ‘religious celebrations’ as few students highlighted that they did not understand the word ‘pilgrimage’. Some students were not aware that Phnom Penh was the capital of Cambodia in Question 17.

The survey forms were available to tourists in both; offline/paper-based and online forms. A total of 469 completed surveys were collected - comprised of 414 offline and 55 online responses. The survey required respondents to indicate their views of a subset of two out of the six different scenarios of Singapore. Six versions (sets 1-6) of the paper-based surveys were created and each version was distributed to 65-70 respondents. For example, set 1 comprised of two future scenario visions in 2025, scenario A-Sustainable urban living and scenario B-Family-oriented Wonderland. Respondents were asked to indicate if these two scenario visions were appealing, would attract them, and make them stay longer when they visit Singapore. Respondents were asked to consider only two scenarios to help manage the length of the questionnaire. The researcher engaged a team of five research assistants who distributed the paper-based surveys to respondents at the leading tourist attractions including; Asian Civilisations Museum, Clarke Quay, Chinatown, Changi Airport, Gardens by the Bay, Merlion Park, Marina Bay Sands, Orchard Road, Singapore Cable Car, Sentosa Island, Tiger Sky Tower, and Resorts World Sentosa in December 2013. Refer to Table 13 for details of survey data collection:

Table 13: Schedule of Offline surveys collected

Date	Location	Set/Scenarios	Surveys
3 Dec	Chinatown (Pagoda street, Smith street, Heritage Centre)	Set 1 (A and B)	22
4 Dec	Singapore Cable Car, Sentosa Island (Imbiah Lookout, Tiger Sky Tower, Merlion), RWS (Hard Rock Hotel, Maritime Museum, SEA Aquarium, Universal Studios)	Set 2 (C and D) Set 3 (E and F)	111
5 Dec	MBS (Art Science Museum), Merlion Park, Singapore River, and Gardens by the Bay	Set 3 (E and F) Set 4 (A and C)	92
7 Dec	Singapore Zoo, River Safari, RWS (Lake of Dreams, Festive Walk, Maritime Museum)	Set 2 (C and D) Set 5 (B and E) Set 6 (D and F)	133
10 Dec	Changi Airport (Departure halls at Terminals 1, 2 and 3)	Set 4 (A and C)	4
12 Dec	Asian Civilisations Museum, Clarke Quay	Set 5 (B and E)	21
14 Dec	Orchard Road	Set 6 (D and F)	31

	Total (offline surveys)		414

The response rate of the paper-based survey was 61.9 per cent, a total of 414 respondents including 9 Chinese translated questionnaires. The rejection rate of the paper-based survey was 38.1 per cent or 255 tourists and reasons cited included; a lack of time as they preferred to enjoy sightseeing at attractions were rushed to take the skytrain around Sentosa Island, needed to catch a flight, were not interested or uncomfortable doing the survey, could not understand the English language, on vacation with family and children, the survey was too lengthy and too many questions, needed to repack and check-in luggage bags, preferred to check-in earlier so to have more time for duty-free shopping, and the souvenirs for respondents were unattractive. To thank those 414 respondents who completed the survey forms and 9 who could not complete the surveys as they had to proceed with their tour programmes, each respondent was given souvenirs such as admission ticket to Asian Civilisations Museum (ACM), JCUS key chain, ‘Singapore Food Festival 2013’ kitchen apron, and a ballpoint pen. For those tourists who refused to complete the survey, ballpoint pens were given as a kind gesture. Online survey links were also forwarded to business associates, friends, and relatives who had overseas friends who visited Singapore recently who were encouraged to participate in the survey. Data collected from surveys were consolidated in Qualtrics software and data analysis was applied using SPSS Version 22 software. Refer to Table 14 for details of online and offline respondent numbers.

Table 14: Offline and Online Responses

Category	Successful responses		Rejected responses		Total number of contacts	
	N	%	N	%	N	%
Offline	414	61.9	255	38.1	669	100
Online	55	100	-	-	55	100
Total	469				728	

4.3 The Sample

4.3.1 Characteristics of visitors

The profile of the respondents was as follows: 266 females (58.3%) and 190 males (41.7%). The majority of respondents have a bachelor’s degree (67%) with an annual household income of less than US$40,000 (54.5%) followed by US$40001-US$60,000 (28.4%). Only three per cent earned US$80,000 and above (Table 15).

Table 15: Demographics of respondents

Gender (N=456)	**N**	**%**
Female	266	58.3
Male	190	41.7
Total	456	100
Annual Household Income (US$) (N=453)	**N**	**%**
Up to 40,000	247	54.5
40,001-60,000	129	28.5
60,001-80,000	63	13.9
80,001-100,000	7	1.5
More than 100,000	7	1.5
Total	453	100
Highest level of Education (N=455)	**N**	**%**
Primary school	7	1.5
High school/College	85	18.7
Bachelor's degree	305	67.0
Postgraduate	58	12.7
Total	455	100
Mean (N=454)	**Mean**	**Std Deviation**
Age	34	11.923

The 456 respondents who participated in the survey comprised a mix of 30 different nationalities from Europe, North America, South America, Africa and Asia Pacific. The top five nationalities in the survey were: Malaysian (21.9%), Indonesian (13.2%), Chinese (11.4%), Thai (8.3%), and Vietnamese (8.1%) (Table 16).

Table 16: Nationalities of Offline respondents

SN	**Nationalities**	**N**	**%**
1	Malaysia	100	21.9
2	Indonesia	60	13.2
3	China	52	11.4
4	Thailand	38	8.3
5	Vietnam	37	8.1
6	Australia	24	5.3
7	Philippines	21	4.6
8	India	20	4.4
9	Myanmar	15	3.3
10	France	12	2.6
11	Japan	10	2.2
12	United Kingdom	10	2.2
13	Germany	10	2.2
14	Cambodia	7	1.5
15	South Korea	6	1.3
16	Denmark	5	1.1
17	Spain	5	1.1
18	Canada	4	0.9
19	Italy	4	0.9
20	United States	3	0.7

21	Hong Kong	2	0.4
22	Netherland	2	0.4
23	Russia	2	0.4
24	Laos	1	0.2
25	South Africa	1	0.2
26	Belarus	1	0.2
27	Chile	1	0.2
28	Norway	1	0.2
29	Sweden	1	0.2
30	Ukraine	1	0.2
	Total	**456**	**100**

4.3.2 Trip Characteristics

Of respondents, 80 per cent were repeat visitors in Singapore. For repeat visitors, most had visited 1-5 times (36.6%) or 6-10 times (34.4%) (Table 17).

Table 17: First time and Repeat visitors

First time visit (N=469)	**N**	**%**
First time visitor	94	20
Repeat visitor	375	80
Total	469	100
Visit Singapore frequency (N=369)	**N**	**%**
1-5 times	135	36.6
6-10 times	127	34.4
11-15 times	49	13.3
More than 16 times	58	15.7
Total	369	100

Most of the respondents were visiting Singapore with their spouse/partner (25.8%), followed by a group of friends (21.7%) or alone (20%). Others came with their family members (12.2%) and those with children (16.2%). The survey revealed that only 11 tourists (2.3%) travelled on package tours compared to 258 tourists (26.2%) in Kau’s 1994 study. The details are listed in Table 18.

Table 18: Visit Singapore with and without companion

Visit Singapore with (N=469)	**N**	**%**
I am visiting alone	94	20.0
I am visiting with spouse/partner	121	25.8
I am visiting with family members	57	12.2
I am visiting with family and a child	26	5.5
I am visiting with family and 2 children	30	6.4

I am visiting with family and 3 children	13	2.8
I am visiting with family and 4 children	7	1.5
I am visiting with a group of friends	102	21.7
I am with an organized tour or group	11	2.3
I am in another group	14	3.0

At least 37% of respondents were away from home from 2-3 days on this trip. Nearly 50% were away from home for at least 4 days, 24.9% of respondents were away from home between 4-7 days, 24.4% were away for more than 7 days. The majority of respondents (40.3%) spent 2-3 days in Singapore, 27.8% spent 4-7 days, and only 19% spent more than 7 days in Singapore. Only 23 (5%) were on overnight stay and the remaining 37 (7.9%) were on a day bus trip from Johor Bahru, Malaysia. More details are listed in Table 19.

Table 19: Duration of overseas trip

Duration of stay away from home (N=465)	**N**	**%**
Day trip	41	8.8
Overnight stay	21	4.5
2 to 3 days	174	37.4
4 to 7 days	116	24.9
More than 7 days	113	24.3
Total	465	100
Duration of stay in Singapore (N=464)	**N**	**%**
Day trip	37	7.9
Overnight stay	23	5.0
2 to 3 days	187	40.3
4 to 7 days	129	27.8
More than 7 days	88	19.0
Total	464	100

Seventy-three percent of respondents indicated that Singapore was the only tourism destination to be visited on this trip, with the remaining 26.9 per cent visiting other destinations as well. The five most commonly visited 'other' tourism destinations were Malaysia (33%), Indonesia (19.6%), Thailand (16.9%), Vietnam (7.4%) and Cambodia (5.3%) (Table 20).

Table 20: Other tourism destinations

Visit other destinations (N=464)	**N**	**%**
Singapore	339	73.1
Other destinations	125	26.9
Total	464	100
Other destinations (N=189)	**N**	**%**
Malaysia	63	33.3
Indonesia	37	19.6
Thailand	32	16.9

Vietnam	14	7.4
Cambodia	10	5.3
Philippine	8	4.2
China	6	3.2
Australia	4	2.1
New Zealand	3	1.6
Hong Kong	2	1.1
Laos	2	1.1
United States of America	2	1.1
Japan	1	0.5
Macau	1	0.5
United Kingdom	1	0.5
Qatar	1	0.5
Myanmar	1	0.5
South Korea	1	0.5

The respondents were also asked to indicate the importance of casinos in the travel decision making and the frequency of gambling per month. The majority of respondents (73 percent) were not keen or avoided visiting the casinos. Only 8.4 percent indicated that casinos played a main or important role in travel decisions. There were 71 percent of respondents who never gambled and only 2.8 percent gambled five times and above per month. Refer to Table 21 for more details.

Table 21: Frequency and Attitudes towards Gambling

Code	Statement best describe gambling attitude	N	%
5	To visit casino is the main reason I travel	14	3.1
4	To visit casino plays an important part in my travel decisions	24	5.3
3	To visit casinos are not a major part of my travel decisions but I enjoy gambling when on holiday	85	18.7
2	I'm not interested in visiting casinos while on holidays	172	37.8
1	I avoid visiting casinos while on holidays	160	35.2
	Frequency of gambling per month		
1	Never	333	71.0
2	Once	81	17.3
3	2-4 times	20	6.2
4	5 times and above	13	2.8

Respondents were asked to identify the three most important sources of information they used in planning and while visiting Singapore. Three most popular sources of information for planning the trips were; friends/family members (43.7%), articles in newspapers/magazines (33.9%), and travel agent (29.4%). During the trip, tourists relied more on information from travel brochures (22.4%), friends/family members (15.1%), and travel agent (15.1%), and accommodation providers (15.1%). The details are listed in Table 22.

Table 22: Sources of information

(N=469)	Plan trip		During trip	
	N	%	N	%
Travel guide books	89	19	14.1	14.1
Travel guide publications/magazines, please indicate 1. ………………... 2. ………………...	34	7.2	18	3.8
Other travellers	82	17.5	48	10.2
Friends / family members	205	43.7	71	15.1
Articles in newspapers / magazines	159	33.9	37	7.9
Travel agent or tour operator	138	29.4	71	15.1
Accommodation providers	84	17.9	71	15.1
Travel brochures / pamphlets	60	12.8	105	22.4
Visitor Information Centres	33	7.0	88	18.8
Travel Fairs, please indicate which ones and where Eg. STB Fair/Thailand 1. ………………... 2. ………………...	27	5.8	17	3.6
Mobile applications, please indicate which application(s)? 1. ………………... 2. ………………...	29	6.2	56	11.9
Internet / websites Destination website:……………………… Accommodation website(s): .....………….. Other website(s):.......……………………...	97	20.7	88	18.8
Social media a. Facebook b. Trip Advisor c. Twitter d.Other…...................................………	 63 64 14 10	 13.4 13.6 3.0 2.1	 60 19 6 1	 12.8 4.1 1.3 0.2

4.4 Results

4.4.1 Perceptions of tourist attractions in Singapore

Respondents were asked to indicate tourist attractions that they had or planned to visit while in Singapore. Overall, the five most popular tourist attractions were; Orchard Road (60.3%), Sentosa (59.4%), Clarke Quay (56.1%), Gardens by the Bay (56.1%), and Chinatown (55%). The least popular places of interests were; Marine Life Park (28.6 per cent), Asian Civilisations Museum (25.2%), and Maritime Experiential Museum (23.9%). It was also noted that more respondents had or intended to visit Marina Bay Sands (51.8%) compared to Resorts World Sentosa (47.5%). Refer to Table 23 for details.

Table 23: Popular Places of Interests

(N=469)	**Visited**		**Plan to visit**		**Total**	
Attractions	**N**	**%**	**N**	**%**	**N**	**%**
Orchard Road	252	53.7	31	6.6	283	60.3
Sentosa Island	253	53.9	26	5.5	279	59.4
Clarke Quay	212	45.2	51	10.9	263	56.1
Gardens by the Bay	210	44.8	53	11.3	263	56.1
Chinatown	225	48.0	33	7.0	258	55.0
Marina Bay Sands (MBS)	190	40.5	53	11.3	243	51.8
Resorts World Sentosa (RWS)	185	39.4	38	8.1	223	47.5
Universal Studios Singapore	146	31.1	75	16.0	221	47.1
Botanic Garden	149	31.8	60	12.8	209	44.6
Merlion Park	158	33.7	45	9.6	203	43.3
Night Safari	120	25.6	81	17.3	201	42.9
Jurong Bird Park	130	27.7	66	14.1	196	41.8
Singapore Cable Car	135	28.8	51	10.9	186	39.7
Zoological Garden	102	21.7	69	14.7	171	36.4
MBS Skypark	103	22.0	67	14.3	170	36.3
MBS Casino	94	20.0	67	14.3	161	34.3
RWS Casino	83	17.7	64	13.6	147	31.3
Marine Life Park	72	15.4	62	13.2	134	28.6
Asian Civilisations Museum	43	9.2	75	16.0	118	25.2
Maritime Experiential Museum	61	13.0	51	10.9	112	23.9

Denote: N=frequency, %=percent

4.4.2 Perceptions of IRs and Singapore's destination image

A total 70.3% of the respondents who have visited or may plan to visit the IRs agreed or strongly agreed that the two IRs have made Singapore a more attractive tourism destination. A further 14.6% were indifferent and only 1.9% disagreed. The mean score on the rating scale where 1=strongly agree and 7 strongly disagree is 2.31. The findings are listed in Table 24.

Table 24: IRs enhanced Singapore's appeal as tourism destination

N=458	**N**	**%**
Strongly agree	82	17.9
Agree	240	52.4
Somewhat agree	60	13.1
No difference	67	14.6
Somewhat disagree	8	1.7
Disagree	1	0.2
Strongly disagree	0	0
Total	458	100

A total 64 per cent of the respondents agreed or strongly agreed that the two IRs met or exceeded their expectations of Singapore tourism experience. Only 1.9 per cent disagreed. The mean score on the rating scale where 1=strongly agree and 7 strongly disagree is 2.45. The findings are listed in Table 25.

Table 25: IRs consistent with expectations of Singapore tourism experience

N=459	**N**	**%**
Exceed expectations	63	13.7
Meet expectations	231	50.3
Somewhat meets expectations	73	15.9
Not sure	83	18.1
Somewhat do not meet expectations	8	1.7
Do not meet expectations	0	0
Well below my expectations	1	0.2
Total	459	100

4.4.3 Perceptions of Singapore as a tourism destination

Respondents rated the attractiveness of Singapore as a tourism destination on key attributes. The results indicate that Singapore is perceived as most attractive with respect to safety and security (3.8), a place to recommend to others (3.78), clean and litter free environment (3.76), opportunities for shopping (3.74), and wide variety of products for shoppers (3.65). However, complimentary casino services (3.29) and high roller clubs (3.28) are viewed least attractive. Findings listed in Table 26. (Rating scale 1=not at all attractive, 5=the most attractive)

Table 26: Attractiveness of Singapore as a tourism destination

Attributes (Rating scale 1=not at all attractive, 5=very attractive)	**Frequency**	**Mean**	**Std Deviation**
Safety and security	449	3.80	0.949
A place to recommend to family/friends/associates	450	3.78	0.901
Clean and litter free environment	450	3.76	0.926
Opportunities for shopping	447	3.74	0.953
Wide variety of products for shoppers	444	3.65	0.893
Political stability	439	3.64	0.904
Pleasant surroundings	448	3.63	0.885
Place to do meetings/exhibitions	442	3.63	0.925
Quality tourist information	448	3.61	0.888
Many people speaking English	444	3.60	0.912
Ease of accessibility of transit city	450	3.59	0.904
Urban landscape	442	3.59	0.869
Excellent medical facilities	438	3.58	0.921
Good quality hotels	448	3.58	0.899
Convenience access to attractions	448	3.57	0.892
Place to do business	442	3.57	0.906
Good quality restaurants	448	3.56	0.870
Good nightlife	450	3.55	0.902
Unique cuisines	444	3.55	0.871
Good customer service	446	3.52	0.913
Place to undertake study/education	442	3.51	0.902
Exotic atmosphere	441	3.45	0.849
Place of religious celebrations/pilgrimage	442	3.45	0.900
Restful and relaxing	447	3.44	0.888
Unique architecture	448	3.43	0.919
Friendly local people	444	3.43	0.963
Appealing family-oriented activities	443	3.42	0.885
Opportunity for adventure	447	3.42	0.914
Museums and art galleries	447	3.42	0.840
Exciting things to do	443	3.41	0.879
Rich cultural heritage	444	3.41	0.878
Pleasant and attractive weather	447	3.36	0.867
Value for money	445	3.36	0.881
Affordable room rate	444	3.35	0.966
Local festivals and shows	443	3.35	0.893
Quality and appeal of attractions	446	3.34	1.076

Many attractions to visit	451	3.32	0.939
Natural scenic beauty	445	3.32	0.951
Appealing group tour packages	441	3.32	0.869
Good beaches	443	3.30	0.942
Pleasant and attractive weather	437	3.29	0.970
Complimentary casino services	437	3.29	0.986
High roller clubs	440	3.28	0.935

The 43 destination attributes on which respondents rated Singapore were based on earlier studies by Crouch (2011) and Kneesel, et al. (2009). The attributes were explored by principal component matrix and rotated varimax giving rise to nine-factor solution with eigenvalues greater than 1. Internal consistency of items within each factor was measured using Cronbach's alpha tests. Items that have alpha coefficient below 0.5 were deleted from further analysis.

Factor 1 consisted of seven items relating to Infrastructure and Attractions, including 'political stability', 'convenience access to attractions', 'safety and security', 'many attractions to visit', 'quality and appeal of attractions', 'ease of accessibility of transit city', and 'urban landscape'. Factor 2 comprised seven items and includes those relating to Tourism such as 'place to do business', 'place to do meetings or exhibitions', 'place to undertake study or education', 'place of religious celebrations or pilgrimages', 'excellent medical facilities', 'opportunities for shopping', and 'museums and art galleries'. Factor 3 focused on Singapore's image as a Culture and Activities and the six items are; 'opportunity for adventure', 'exciting things to do', 'local festivals and shows', 'unique cuisines', 'rich cultural heritage', and 'restful and relaxing'. The fourth factor, Casino, is related to three items, 'complimentary casino services', 'high roller clubs', and casino promotions/discounts'.

Items with regard to Nature and Tours are captured in Factor 5. It consisted of five items such as 'pleasant and attractive weather', 'exotic atmosphere', 'good beaches', 'appealing group tour packages', and 'natural scenic beauty'. Factor 6 Nightlife and Restaurant also consisted of five items, 'good customer service', 'good nightlife', 'good quality restaurants', 'a place to recommend to family/friends/associates', and 'value for money'. Environment and Shopping is represented by factor 7, which measured the four items, 'clean and litter free environment', 'pleasant surroundings', 'wide variety of products for shoppers', and 'appealing family-oriented activities'. Factor 8, Price and Quality, is composed of four items, 'availability of quality tourist information', 'affordable room rates', 'good quality hotels', and 'unique architecture'. The ninth factor, People' referred to 'friendly local people' and 'many people speaking English'. Refer to Table 26 for details.

The average mean scores for all factors was between 3.28 (lowest) and 3.61 (highest) which indicated that the respondents generally had a positive image of Singapore as a tourism destination on these attributes. In particular, factor 7, Environment and Shopping has a high mean score of 3.61 as it offers a pleasant, clean and litter-free environment, wide variety of products for shoppers, and also appealing family-oriented activities. Details are listed in Table 27.

Table 27: Factor analysis of attribute items

Factor name	Items within factor	Mean	Loading	Alpha	Eigenvalue
Factor 1: Infrastructure and Attractions		**3.55**		0.858	12.408
	Safety and security	3.80	0.710		
	Political stability	3.64	0.758		
	Ease of accessibility of transit city	3.59	0.578		
	Urban landscape	3.59	0.532		
	Convenience access to attractions	3.57	0.731		
	Quality and appeal of attractions	3.34	0.686		
	Many attractions to visit	3.32	0.691		
Factor 2: Tourism		**3.56**		0.817	3.343
	Opportunities for shopping	3.74	0.755		
	Place to do meetings/exhibitions	3.63	0.703		
	Excellent medical facilities	3.58	0.573		
	Place to do business	3.57	0.523		
	Place to undertake study/education	3.51	0.494		
	Place of religious celebrations/pilgrimage	3.45	0.452		
	Museums and art galleries	3.42	0.367		
Factor 3: Culture and Activities		**3.42**		0.774	2.058
	Unique cuisines	3.55	0.505		
	Restful and Relaxing	3.44	0.430		
	Opportunity for adventure	3.42	0.642		
	Exiting things to do	3.41	0.505		
	Rich cultural heritage	3.41	0.454		
	Local festivals and shows	3.35	0.532		
Factor 4: Casino		**3.28**		0.711	1.354
	Complimentary casino services	3.29	0.800		
	Casino promotions/discounts	3.29	0.618		
	High roller clubs	3.28	0.747		
Factor 5: Nature and Tour		**3.35**		0.720	1.310
	Exotic atmosphere	3.45	0.617		
	Pleasant and attractive weather	3.36	0.705		
	Appealing group tour packages	3.32	0.546		
	Natural scenic beauty	3.32	0.420		
	Good beaches	3.32	0.552		
Factor 6: Nightlife and Restaurant		**3.55**		0.718	1.290
	A place to recommend to family/friends/associates	3.78	0.436		
	Good quality restaurants	3.56	0.475		
	Good nightlife	3.55	0.592		
	Good customer service	3.52	0.601		
	Value for money	3.36	0.379		

Factor 7: Environment and Shopping	 Pleasant surrounding Clean and litter free environment Wide variety of products for shoppers Appealing family-oriented activities	**3.61** 3.63 3.76 3.65 3.42	 0.589 0.564 0.474 0.390	0.711	1.148
Factor 8: Price and Quality	 Availability of quality tourist information Good quality hotels Unique architecture Affordable room rates	**3.49** 3.61 3.58 3.43 3.35	 0.573 0.520 0.369 0.316	0.639	1.067
Factor 9: People	 Many people speaking English Friendly local people	**3.52** 3.60 3.43	 0.660 0.699	0.614	1.018

Respondents were asked to rate the attractiveness of the several competing destinations in the Asia Pacific region as ideal travel destinations when compared to visiting Singapore. The five most attractive competing destinations were Tokyo (3.68), Taipei (3.53), Sydney (3.51), Seoul (3.44) and Melbourne (3.42). The least attractive destinations were Jakarta (2.9), Johor Bahru (2.75) and Mumbai (2.63). Refer to details in Table 28.

Table 28: Compared Singapore with other destinations in terms of attractiveness

Destinations (Rating scale 1=much less attractive, 5=much more attractive)	**Frequency**	**Mean**	**Std Deviation**
Tokyo (Japan)	355	3.68	1.054
Taipei (Taiwan)	346	3.53	1.030
Sydney (Australia)	358	3.51	1.006
Seoul (South Korea)	348	3.44	1.004
Melbourne (Australia)	343	3.42	1.014
Auckland (New Zealand)	329	3.36	.974
Dubai (United Arab Emirates)	335	3.27	.909
Bali (Indonesia)	380	3.18	.957
Hong Kong (China)	387	3.17	.909
Bangkok (Thailand)	397	3.09	1.001
Hanoi (Vietnam)	352	3.02	1.010
Macau (China)	337	3.00	.971
Genting Highlands (Malaysia)	382	2.99	.911
Penang (Malaysia)	354	2.99	1.015
Ho Chi Minh City (Vietnam)	353	2.93	.965
Phnom Penh (Cambodia)	317	2.90	1.016
Manila (Philippines)	327	2.90	1.018
Jakarta (Indonesia)	358	2.78	.959
Johor Bahru (Malaysia)	378	2.75	.991
Mumbai (India)	336	2.63	1.035

4.4.4 Perception of brand personality of Singapore compared with other destinations

Respondents were asked to compare the destination image of Singapore relative to twenty tourism destinations based on experience for those who have visited the destinations and perceptions for those destinations they have yet to visit. They were asked to select three most attractive out of 28 destination personality for Singapore and also chose three most attractive personality descriptors for three tourism destinations. The three key personality descriptors chosen for Singapore were; modern (43.5%), cosmopolitan (35.6%) and cultural (25.6%). Since the choice of personalities for all other destinations was spread across 20 destinations, the results in Table 28 give only an orderly of the selection of the attributes for other cities, rather than a direct comparison to the Singapore (SG) data. Refer to Table 29 for details.

Table 29: Destination image of Singapore and other destinations

Words	N	SG (%)	A (%)	B (%)	C (%)
Affordable	143	7.9	Bali (4.1)	Taipei (2.6)	Bangkok (2.3)
Amazing	140	14.9	Seoul (3.0)	Dubai (2.6)	Tokyo (2.3)
Creative	134	14.1	Tokyo (3.0)	Seoul (1.9)	Dubai (1.7)
Cheerful	143	13.9	Bali (3.2)	Sydney (1.9)	Tokyo (1.7)
Cosmopolitan	*216*	*35.6*	*Sydney (1.9)*	*Tokyo (1.7)*	*Dubai/HongKong (0.9)*
Cultural	*204*	*25.6*	*Tokyo (3.6)*	*Bali (2.8)*	*Seoul (1.9)*
Charming	136	11.1	Seoul (3.2)	Tokyo (3.0)	Bali (1.9)
Daring	104	9.2	Dubai (2.1)	Seoul (1.9)	Sydney/Bali (1.3)
Discovery	112	7.7	Tokyo (2.1)	Melbourne (1.9)	Sydney (1.7)
Exotic	110	9.2	Bali (3.8)	Tokyo (2.1)	Dubai (1.3)
Exciting	108	10.0	Tokyo (1.3)	Hong Kong (1.3)	Dubai/Sydney/Melbourne (1.1)
Friendly	102	10.0	Bali (2.3)	Taipei (1.5)	Penang (1.3)
Fantasy	94	8.7	Seoul (1.7)	Tokyo (1.5)	Bali/Manila/Sydney(1.3)
Fun	113	10.2	Sydney (2.3)	Taipei (1.5)	Bali (1.5)
Imaginative	83	6.2	Tokyo (3.0)	Dubai (1.7)	Seoul (1.5)
Incredible	81	7.0	Tokyo (1.9)	Dubai (1.3)	Bangkok/ Sydney (1.1)
Inspiring	103	10.7	Tokyo (2.8)	Bali/Seoul (1.1)	Sydney/Taipei (1.1)
Modern	*239*	*43.5*	*Tokyo (2.3)*	*Sydney (1.3)*	*Seoul/Taipei (0.9)*
Paradise	86	5.3	Bali (3.6)	Tokyo (1.7)	Seoul (1.7)
Pure	66	7.0	Bali (1.7)	Seoul (0.9)	Tokyo (0.9)
Scenic	71	3.0	Tokyo (2.1)	Seoul (1.3)	Sydney (1.3)
Sincere	53	3.8	Tokyo (1.5)	Taipei (1.3)	Seoul (1.1)
Sophisticated	56	4.5	Seoul (1.5)	Tokyo (1.3)	Sydney (1.3)
Spectacular	45	2.3	Tokyo (1.7)	Bali/Sydney*(0.9)	Dubai/Seoul (0.9)
Spirited	38	1.7	Tokyo (1.9)	Bali (0.9)	Melbourne/ Hanoi (0.6)
Unique	65	4.7	Tokyo (1.9)	Melbourne(1.3)	Taipei (1.1)
Warm	58	4.5	Taipei (1.5)	Bali (1.1)	Tokyo (0.9)
Welcoming	63	5.5	Taipei (2.1)	Bali (1.3)	Tokyo (1.1)

To analyse the destination image of Singapore compared to the other destinations, a destination personality matrix was developed based on the three words that respondents chose to describe each destination. Respondents were asked to label three brand personality and three other destinations. This approach led to the word ‘modern’ ranked highest as ‘1’ being rated 204 times by respondents, followed by the word ‘cosmopolitan’ rated 167 times. The least mentioned was ‘spirited’ and ranked lowest as ‘28’. For words like ‘exciting’ and ‘friendly’, both were mentioned 47 times, a tied-score would then be treated as an average rather than ranking. In this case it was supposed to be ranked 10th and 11th, so to obtain the average ranking, it was treated as (10 added to 11) first and divided by 2 equals 10.5. Based on Table 28, there were nine destinations with highest personality descriptors including; Bali, Bangkok, Dubai, Manila, Melbourne, Seoul, Sydney, Taipei, and Tokyo. The destination personality matrix was then treated as an input data for MDS Alscal analysis. Refer to Table 30 for details.

Table 30: Destination Personality Matrix

Descriptors	SGN	BAL	BKK	DUB	MNL	MEL	SEL	SYD	TAI	TOK
Affordable	15	1	1	20.5	1	28	18	19.5	1	26
Amazing	4	9.5	13	1	26	15	2	4.5	4.5	7.5
Creative	5	13	13	3.5	21.5	10	4	8.5	7.5	3.5
Cheerful	6	4	6	16.5	7.5	5.5	8.5	2.5	11	16.5
Cosmopolitan	2	23.5	22.5	26	14	15	23	2.5	20.5	16.5
Cultural	3	5	6	16.5	26	10	4	23.5	11	1
Charming	7	7	22.5	8	3.5	5.5	1	14	24	3.5
Daring	12.5	13	13	2	7.5	10	4	8.5	24	28
Discovery	16	13	4	8	14	1	23	4.5	24	10
Exotic	12.5	2	13	5.5	21.5	26.5	18	14	11	10
Exciting	10.5	21	6	8	7.5	5.5	18	14	16	21.5
Friendly	10.5	6	22.5	16.5	3.5	5.5	20	19.5	4.5	26
Fantasy	14	13	13	23.5	2	23	6	8.5	16	19.5
Fun	9	9.5	2.5	23.5	7.5	5.5	13	1	4.5	23.5
Imaginative	19	17.5	22.5	3.5	26	23	8.5	23.5	16	3.5
Incredible	17.5	23.5	2.5	5.5	14	23	20	14	16	13
Inspiring	8	23.5	22.5	16.5	14	23	13	14	11	6
Modern	1	25.5	27	16.5	14	23	18	27	16	7.5
Paradise	21	3	13	11.5	21.5	23	8.5	8.5	20.5	16.5
Pure	17.5	8	22.5	16.5	7.5	26.5	18	23.5	26.5	26
Scenic	26	17.5	27	20.5	21.5	5.5	11	8.5	20.5	10
Sincere	25	27.5	22.5	26	14	15	13	23.5	7.5	19.5
Sophisticated	23.5	27.5	13	23.5	21.5	15	8.5	8.5	20.5	21.5
Spectacular	27	21	22.5	11.5	14	22	18	17.5	26.5	16.5
Spirited	28	21	13	23.5	21.5	15	23	23.5	28	13
Unique	22	25.5	13	11.5	21.5	2	24	17.5	11	13
Warm	23.5	17.5	22.5	26	7.5	15	18	23.5	4.5	3.5
Welcoming	20	13	22.5	26	21.5	15	20	27	2	23.5

(Note: SGN=Singapore, DPS=Bali, BKK=Bangkok, DUB=Dubai, MNL=Manila, MEL=Melbourne, SEL=Seoul, SYD=Sydney, TAI=Taipei TOK=Tokyo)

Descriptor rankings for Singapore and nine other destinations as presented in Table 29 were used as the input matrix for multi-dimensional scaling analysis. These nine appealing destinations were selected based on ratings and words used to describe each destination were ranked in order accordingly. The 2-dimension solution produced a stress value of 0.144 which is above 0.1 while the 3-dimensional solution produced a lower stress value (stress value=0.07). The value R-square 93860 and Stress value below 0.1 is considered adequate with scores below 0.05 as very good and low stress solutions. The map is presented in Fig.9.

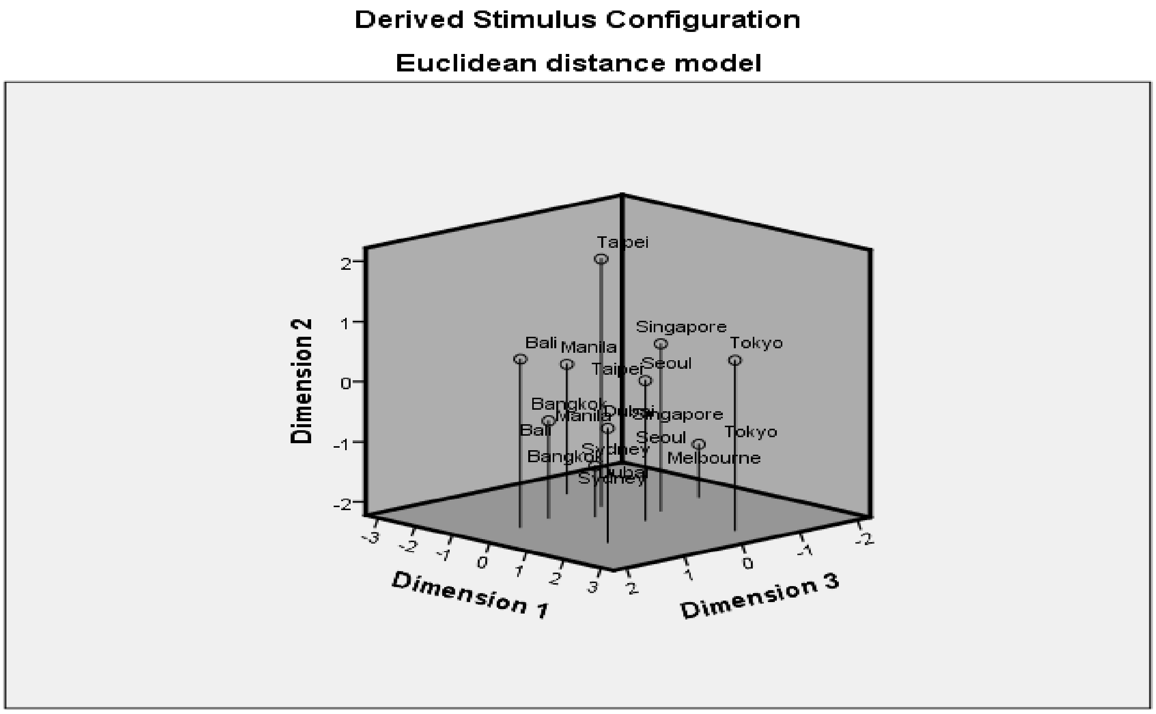


Fig.9 - Perceptual Comparison of Singapore and 9 destinations (3 dimensions)

To interpret the findings of the 3-dimensional map of Singapore compared to other tourism destinations, it would be useful to do the analysis based on three most rated brand descriptors and three least rated brand descriptors. Refer to Table 31 for details.

Table 31: Ranking of highest and lowest personality descriptors

Destinations	Highest personality descriptors	Lowest personality descriptors
Singapore	Modern(1) Cosmopolitan(2) Cultural (3)	Scenic(26) Spectacular(27) Spirited(28)
Bali	*Affordable(1)* *Exotic(2)* Paradise(3)	Incredible/Inspiring/Modern/ Cosmopolitan (23.5) Unique/Modern(25.5) Sincere/Sophisticated(27.5)
Bangkok	Affordable(1) Incredible/Fun(2.5) Discovery(4)	Friendly/Imaginative/Inspiring/Pure/ Warm/Spectacular/Welcoming/ Charming/Cosmopolitan(22.5) Scenic/Modern(27)
Dubai	Amazing(1) Daring(2) Creative/*Imaginative(3.5)*	*Affordable*/Scenic*(20.5)* Spirited/Fantasy/Fun/Sophisticated(23.5) Warm/Sincere/Welcoming/ Cosmopolitan (26)
Manila	*Affordable(1)* Fantasy(2) Friendly/Charming(3.5)	Creative/Exotic/Paradise/Scenic/Spirited/ Sophisticated/Unique(21.5) Amazing/Cultural/Imaginative(26)
Melbourne	*Discovery(1)* Unique(2) Cheerful/Charming/Exciting/Fun/ Friendly/Scenic/(5.5)	Fantasy/Imaginative/Incredible/Inspiring/ Modern/ Paradise(23) Pure/*Exotic*(26.5) *Affordable(28)*
Seoul	Charming(1) Amazing(2) Creative/Cultural(4)	Incredible/Friendly/Welcoming(20) Cosmopolitan/Discovery/Spirited(23) Unique(24)
Sydney	Fun(1) Cheerful/Cosmopolitan(2.5) *Discovery(4.5)*	*Affordable(19.5)* Warm/Spirited/Sincere/Pure/Imaginative/ Cultural(23.5) Modern/Welcoming(27)
Taipei	Affordable(1) Welcoming(2) Amazing/Warm/Friendly/Fun(4.5)	Discovery(24) Pure/Spectacular(26.5) Spirited(28)
Tokyo	*Cultural(1)* Creative/Charming/Warm/ Imaginative(3.5) Inspiring(6)	Welcoming(23.5) Affordable/Friendly/Pure(26) Daring(28)

Note: Descriptors used for analysis are in italics.

A visual presentation of brand personality for Singapore and nine competing destinations was illustrated in the following diagrams. For Singapore, the three highest ranked personality descriptors referred to modern, cosmopolitan, and cultural. The least ranked personality descriptors were scenic, spectacular, and spirited (italics). Refer to Fig. 10 for details.

SINGAPORE

Modern, Cosmopolitan, Cultural
Scenic, Spectacular, Spirited

BALI

Affordable, Exotic, Paradise
Sincere, Sophisticated

BANGKOK

Amazing, Daring, Exotic
Scenic, Modern

DUBAI

Affordable, Fun, Incredible
Affordable, Warm, Welcoming
Cosmopolitan

MANILA

Affordable, Fantasy
Amazing, Cultural, Imaginative

MELBOURNE

Discovery, Unique
Pure, Exotic, Affordable

SEOUL

Charming, Amazing
Discovery, Spirited, Unique

SYDNEY

Fun, Cheerful, Cosmopolitan
Welcoming, Modern

TAIPEI

Affordable, Welcoming
Spectacular, Pure, Spirited

TOKYO

Cultural, Creative, Charming, Warm, Imaginative
Affordable, Friendly, Pure, Daring

Figure 10: Image clusters of Singapore and nine competing destinations

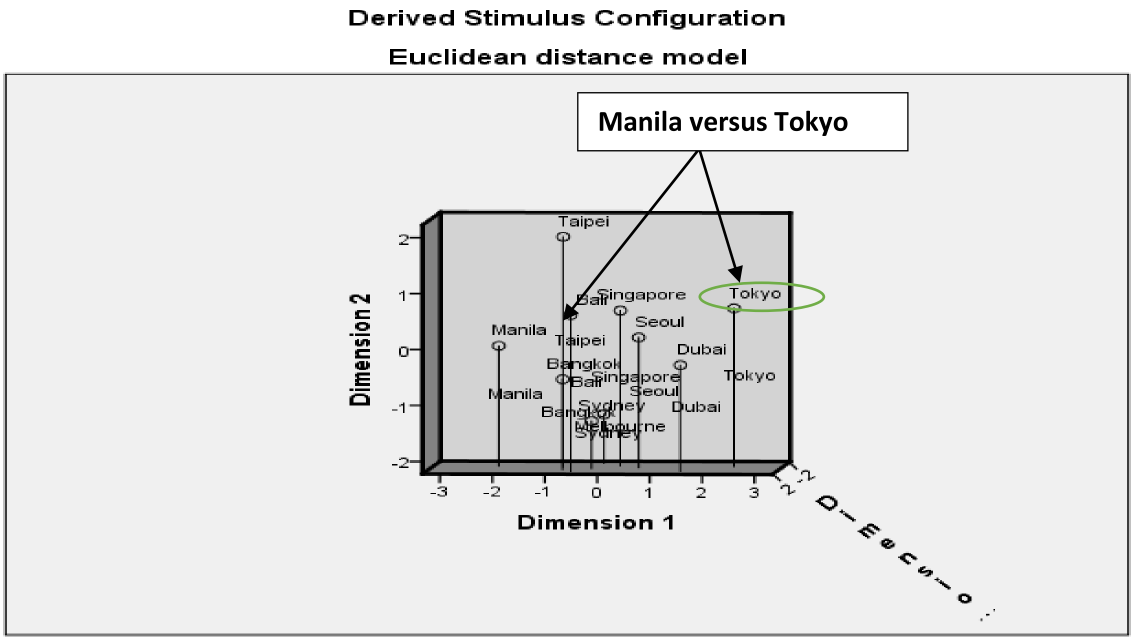


Fig.11 - Perceptual Comparison of Singapore and 9 destinations (Dimension 1)

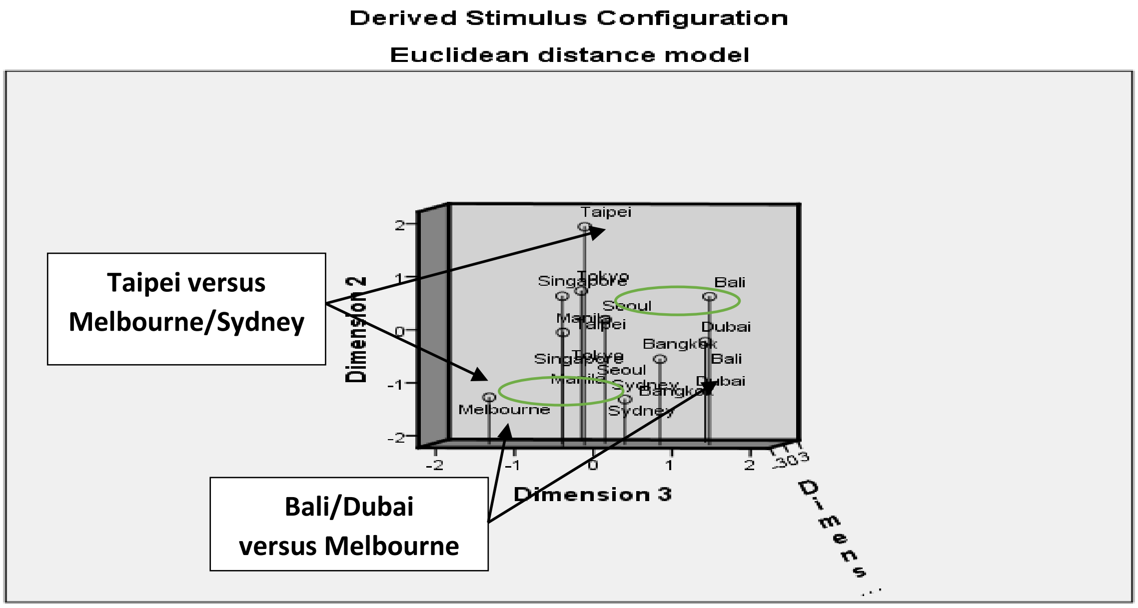


Fig.12 - Perceptual Comparison of Singapore and 9 destinations (Dimensions 2 and 3)

It was observed from ‘Dimension 1’ that Tokyo and Manila (arrows) were the two ‘furthest apart’ destinations from each other. From Table 30, the branding personality ‘Cultural’ was the highest ranked (1) for Tokyo (1) but lowest (26) for Manila. However, ‘Affordable’ was ranked lowest (26) for Tokyo but highest (1) for Manila. Singapore is in the middle as tourists perceived Singapore offers cultural heritage and affordability. Refer to Figure 11 for details.

For ‘Dimension 2’, the destinations furthest apart were Taipei versus Melbourne and Sydney. Taipei was ranked second for being ‘Welcoming’ compared to Melbourne (15) and Sydney (27). On the other hand, for the descriptor ‘Discovery’, it was perceived as highest (1) for Melbourne, (4.5) for Sydney versus (24) for Taipei. From ‘Dimension 3 view’, the two furthest destinations were Bali and Dubai, versus Melbourne. The personality descriptors ‘Exotic’ ranked (2) and ‘Paradise (3) for Bali. Dubai was perceived well as ‘Imaginative’ (3.5) but lowly (20.5) for ‘Affordable’. Melbourne was not well ranked for descriptors ‘Affordable’ (28) and ‘Exotic (26.5). Singapore is perceived as a mix of East and West as it is also in the middle. Refer to Figure 12 for details.

4.4.5 Satisfaction with Singapore

Of all respondents, 68.1% were satisfied or very satisfied with their experience in Singapore. A further 12.7% were neutral and only 4.6% expressed a level of dissatisfaction. The mean score was 2.28. The findings are listed in Table 32. (Rating scale 1=Very satisfied, 7=Very dissatisfied)

Table 32: Tourists' satisfactory experience in Singapore

N=458	**N**	**%**
Very satisfied	117	25.5
Satisfied	195	42.6
Somewhat Satisfied	67	14.6
Neutral	58	12.7
Somewhat Dissatisfied	21	4.6
Very dissatisfied	0	0
Total	458	100

Eighty three percent of respondents indicated that they are likely to recommend others to visit Singapore. A further 12.2% were neutral and only 4.4% are unlikely to recommend Singapore to others. The mean score was 2.24. The findings are listed in Table 33. (Rating scale 1=Very likely, 7=Very unlikely)

Table 33: Recommend visiting Singapore to others

N=458	**N**	**%**
Very Likely	126	27.5
Likely	198	43.2
Somewhat likely	58	12.7
Not sure	56	12.2
Somewhat Unlikely	16	3.5
Unlikely	4	0.9
Very unlikely	0	0
Total	458	100

Respondents were asked if they would visit Singapore again and 272 respondents (59.9%) indicated that they are going to revisit Singapore within five years. Another 144 respondents (31.7%) will also revisit Singapore but unsure when they will do it. Only 34 respondents (7.5%) were unsure and 4 (0.9%) would not visit Singapore again. The findings are listed in Table 34.

Table 34: Revisit Singapore

N=454	N	%
Yes, within the next 12 months	182	40.1
Yes, within the next 5 years	90	19.8
Yes, not sure when	144	31.7
Not sure	34	7.5
No	4	0.9
Total	454	100

Respondents were asked to list two best features about their visit to Singapore. The top five best items were; cleanliness (39.4%), followed by convenient transportation system (20.5%), and food/cuisines (14.3%). Others perceived visiting Universal Studios Singapore at Resorts World Sentosa (7.3%) as more attractive than Marina Bay Sands (4.2%). The Other-Attractions included; Botanic Garden, Riverside, Singapore Zoo, Garden by the Bay, Orchard Road, Sentosa, Singapore Flyer, Merlion Park, Casino, Clarke Quay, River Safari, Jurong Bird Park, and Guan Yin temple. Other-Environment included; city state, modern technology, planned market economy, healthy legal institution, and social stability. Other-General included; relax, everything is good, many things going on, price, clear signage, queue, efficient service, kids friendly, see family/friends, cool, peaceful, transformation, comfortable, amazing, and fantastic. Details of these findings are listed in Table 35.

Table 35: Two best things in visiting Singapore

N=488	N	%
Clean	102	39.4
Convenient Transportation	53	20.5
Food/cuisines	37	14.3
Safety and security	36	13.9
People	28	10.8
Shopping	25	9.7
Resorts World Sentosa/Universal Studios Singapore	19	7.3
Multicultural/Asian culture	13	5.0
Marina Bay Sands	11	4.2
Other-Attractions	63	24.3
Other-Environment	42	16.2
Other-General	39	15.1
Other-Infrastructure	20	7.7

The respondents were also asked to list two areas of improvement in Singapore. Key areas of improvement included; high living costs (23.1%), poor attitude of locals (18%), and quality of food (14.2%). Others also suggested that the management of attractions (9.5%) is a concern. Other-General included; slower living pace, stressful, difficult to buy medicine, signage to show directions and discounts, more seats at food courts, toilet seat was too high, and land constraints. Other-infrastructure included; reduced foreign vehicle entry fares, electronic road pricing (ERP) was too high, increased car speed, traffic light system was confusing, public housing flats were overloaded, traffic jam at Custom checkpoint, takes too long to cross the road, lack of U-turn on the roads, overcrowding. The tourists also suggested improvements to the existing Mass Rapid Transit (MRT) train/subway systems such as extending operating hours, increasing the number of MRT stations, permit drinking in MRT stations and on-board trains, high traffic volume during peak hours, and improve the orderliness in boarding and alighting from MRT trains. Details are listed in Table 36.

Table 36: Two areas of improvement in Singapore

N=282	**N**	**%**
High living costs	39	23.1
Poor attitude of locals	39	23.1
Food quality	24	14.2
Attractions Management	16	9.5
Hospitality Service	7	4.1
Other-General	11	6.5
Other-Infrastructure	71	42.0
Other-Attractions	49	29.0
Other-Environment	26	15.4

4.4.6 Perceptions of future landscape of Singapore's tourism development in 2025

Forward looking to tourism in Singapore in 2025, Singapore has the potential to pursue different future directions – cultural, gastronomy, leisure, education, medical or sports tourism. Respondents were asked to provide feedback on two of the following six scenarios (A-F).

Scenario A – Singapore: The Garden – sustainable urban living

The new Gardens by the Bay transformed Singapore to be more than a city in the garden in 2012. In 2025, Singapore aims to become one of the most liveable cities in Asia. To be a thriving economy, Singapore is promoting a sustainable development strategy by minimizing the impact of growth on the environment and the efficient usage of resources. In 2025 you can:

- be visiting the new 360-hectare Jurong Lake District comprising waterfront hotels, parks and playgrounds, shopping mall, and an integrated health hub for everyone
- be enjoying a 20km cycling trail around eight parks in western Singapore and viewing 550 species of trees and 50 species of birds
- be experiencing a greener and environmentally-friendly Singapore with recreational activities in the reservoirs and waterways, cooler high-rise buildings, more recycling campaigns and larger green space

Destinations (Rating scale: 1=not all, 5=very)	**Frequency**	**Mean**	**Percent who rated 4 and above**
Overall how appealing is this future vision of Singapore to you?	77	3.75	57.2
How likely is it that this future vision would attract you to visit Singapore?	77	3.71	57.2
How likely is it that this future vision would make you stay longer in Singapore?	77	3.53	50.7
Total		11.00	

The 77 respondents presented with the vision of Singapore: the Garden-sustainable urban living rated this option as somewhat appealing (mean=3.75) and indicated it could attract (mean= 3.71) them to visit and to stay longer (3.53) in Singapore. The total mean score for this scenario was 11.0.

Scenario B – Singapore: Family-oriented wonderland

In 2025, Singapore needs to innovate with newer theme parks offering exciting rides to attract tourists to visit the city instead of other destinations such as China, Malaysia and South Korea who are developing newer theme parks including Hello Kitty, Legoland and Disneyland. In order to remain competitive, Singapore should develop new, and also upgrade current, theme parks to appeal to tourists:

- Universal Studios Singapore introduces newer movie-themed rides to continue to attract visitors
- Adventure Cove Waterpark and Wild Wild Wet introduce newer and thrilling slides for visitors
- Animal theme parks exhibit exotic species, and offer new animal shows and white water rafting for visitors

Destinations (Rating scale: 1=not all, 5=very)	**Frequency**	**Mean**	**Percent who rated 4 and above**
Overall how appealing is this future vision of Singapore to you?	148	3.55	56.1
How likely is it that this future vision would attract you to visit Singapore?	148	3.66	59.5
How likely is it that this future vision would make you stay longer in Singapore?	147	3.54	53.8
Total		10.74	

The 148 respondents presented with the vision of Singapore: Family oriented wonderland rated this option as quite appealing (mean=3.55) and indicated it could attract (mean= 3.66) them to visit and to stay longer (3.54) in Singapore. The total mean score for this scenario was 10.74.

Scenario C – Singapore: Melting Pot of Asia – A Hybrid of Asian Culture

In 2025, Singapore will be a leading multi-cultural hub of Asia with its unique society of different races living in harmony. Tourists will be fascinated with the rich and multicultural aspects of the Chinese, Indians, Malays and Eurasians who settled in Singapore a unique multicultural society. Tourists do not need to go further than Singapore to experience:

- unique cuisines from four ethnic backgrounds including; chicken rice, nasi goreng, chicken masala in every corner in the city
- multi-cultural heritage trails in Jurong Lake District, and Pulau Ubin so visitors can appreciate the contributions of the early immigrants to what Singapore is today
- tours of Peranakan Museum, old 1920s shophouses and tasting Peranakan delicacies

Destinations (Rating scale: 1=not all, 5=very)	**Frequency**	**Mean**	**Percent who rated 4 and above**
Overall how appealing is this future vision of Singapore to you?	162	3.44	46.9
How likely is it that this future vision would attract you to visit Singapore?	162	3.37	44.4
How likely is it that this future vision would make you stay longer in Singapore?	162	3.33	47.5
Total		10.14	

The 162 respondents presented with the vision of Singapore: Melting Pot of Asia–A Hybrid of Asian Culture rated this option as somewhat appealing (mean=3.44) and indicated it could attract (mean= 3.37) them to visit and to stay longer (3.33) in Singapore. The overall mean score for this scenario was 10.14.

Scenario D – Singapore: Vibrant Tropical City

In 2025, Singapore will be a leading city in the tropics with its strategic location in the heart of Asia. It boasts modern infrastructure, architecture, pristine rainforest and sandy beaches. It offers a variety of food and culture and a cosmopolitan society where a lively local culture mixes with influences from all over the globe. The night life is exciting with quality nightspots and offers quality life music scene. High-end tourists will be entertained with quality hotels, luxury shopping and dining experiences. Budget travellers can choose economy hotels, dine at local eateries and shop at heartland malls. Tourists will see that:

- Singapore is a leading aviation hub with five airport terminals to welcome 135 million visitors annually, extensive airlines network, first-class shopping and retail experience
- there are 60,000 hotel rooms in all categories, an increase of 50% based on current capacity to welcome 20 million international visitors
- the two Integrated Resorts (IRs) have upgraded their state of art facilities and casino licenses are extended to 2030, enabling them to be the world's leading IRs

Destinations (Rating scale: 1=not all, 5=very)	**Frequency**	**Mean**	**Percent who rated 4 and above**
Overall how appealing is this future vision of Singapore to you?	224	3.39	49.1
How likely is it that this future vision would attract you to visit Singapore?	222	3.47	50.9
How likely is it that this future vision would make you stay longer in Singapore?	221	3.43	49.8
Total		10.26	

The 224 respondents presented with the vision of Singapore: Vibrant Tropical City rated this option as somewhat appealing (mean=3.47) and indicated it could somewhat attract (mean= 3.47) them to visit and to stay longer (3.43) in Singapore. The overall mean score for this scenario was 10.26.

Scenario E – Singapore: medical and wellness tourism - healthcare hub of Asia Pacific

Singapore is Asia’s leading medical hub providing internationally accredited healthcare for patients and attracting medical tourists from various countries across the globe. Tourists can be assured of high quality standards in health care services supported by the latest infrastructure at affordable costs compared to developed nations in Europe and South East Asia. Singapore is home to some of Asia's leading Joint Commission International (JCI) accredited and ISO 9001:2000 certified hospitals. It has an efficient system as well, with WHO rankings placing it 6th position in terms of healthcare benefits and infrastructure. Tourists can expect:

- complete healthcare eco-system and quality treatment at competitive costs
- To be offered a range of medical care from wellness services to high-end specialist care in cardiology, obstetrics and gynaecology, oncology, neurology and, pediatric
- receive quality healthcare services along with enjoyable tourism experiences as Singapore offers exciting attractions, vibrant nightlife, fine dining and shopping malls

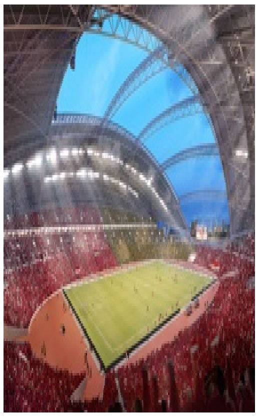
Destinations (Rating scale: 1=not all, 5=very)	**Frequency**	**Mean**	**Percent who rated 4 and above**
Overall how appealing is this future vision of Singapore to you?	153	3.35	49.1
How likely is it that this future vision would attract you to visit Singapore?	153	3.31	44.4
How likely is it that this future vision would make you stay longer in Singapore?	153	3.35	46.4
Total		10.01	

The 153 respondents presented with the vision of Singapore: Medical and Wellness tourism healthcare hub of Asia Pacific rated this option as somewhat appealing (mean=3.35) and indicated it could somewhat attract (mean= 3.31) them to visit and to stay longer (3.35) in Singapore. The overall mean score for this scenario was 10.01.

Scenario F – Singapore: Sporting Hub of Asia Pacific

In 2014, the Singapore Sports Hub will be a destination built for locals to watch, play and support world-class sports and entertainment events. It will be a sports, lifestyle and entertainment ecosystem that will host multiple events all year round. It features a 55,000-seat National Stadium, a 6,000-seat Aquatics Centre and Leisure Water facility, 41,000 sqm (441,000 sqft) of commercial retail space. Tourists and locals can expect Singapore to host:

- world-class events in All-England (badminton), ITTF (table-tennis), Australian Open (tennis), INF (netball), NBA (basketball)
- Olympic Games, Commonwealth Games, Asian Games, and Southeast Asian Games
- World Cup, Confederations Cup, Asian Cup, Manchester United and Real Madrid



Destinations (Rating scale: 1=not all, 5=very)	**Frequency**	**Mean**	**Percent who rated 4 and above**
Overall how appealing is this future vision of Singapore to you?	149	3.49	52.3
How likely is it that this future vision would attract you to visit Singapore?	149	3.39	43.6
How likely is it that this future vision would make you stay longer in Singapore?	149	3.36	44.3
Total		10.23	

The 149 respondents presented with the vision of Singapore: Sporting Hub of Asia Pacific rated this option as appealing (mean=3.49) and indicated it would somewhat likely to attract (mean= 3.39) them to visit and to stay longer (3.36) in Singapore. The overall mean score for this scenario was 10.23.

4.4.7 Segmentation of respondents

To have an in-depth understanding of the 469 respondents' perceptions of the two IRs and tourism development in Singapore, the respondents was further divided into two clusters; namely Cluster 1-Attractions and Shopping versus Cluster 2-Casinos, Prices and Quality of tourism products. Cluster 2 tourists with emphasis on casinos, prices and quality of tourism products tourists originated from the Asia Pacific region including, Indonesia (16.1%), China (14.9%), Thailand (10.2%), and 'Other Asian' (18.8%) countries such as, Australia, South Korea, Hong Kong, Macau, Japan, India, Philippines, Cambodia, Laos, and Myanmar. Cluster 1 tourists who prefer visiting attractions and shopping were mainly from Malaysia (30.8%), Vietnam (17.1%), and 'Other' nationalities (18.5%). The 'Other' tourists were from various continents such as United Kingdom, Spain, Germany, France, Denmark, Netherlands, Russia, Ukraine, Sweden, Norway, Italy (Europe), United States, Canada (North America), Chile (South America) and South Africa (Africa). Refer to Table 37 for details.

Table 37: Categories of nationalities of respondents

	Cluster 1		**Cluster 2**		**Chi-Square Test Pearson Chi-Square**		
Nationality (N=469)	**N**	**%**	**N**	**%**	**Value**	**df**	**Sig.**
Malaysia	36	30.8	55	21.6			
Indonesia	6	5.1	41	16.1			
China	8	6.8	38	14.9			
Thailand	3	2.6	26	10.2			
Vietnam	20	17.1	11	4.3			
Other Asian	22	18.8	57	22.4			
Others	22	18.8	27	10.6			
Total	117	100	255	100	40.902[a]	6	0.000

4.4.8 Analysis of Cluster 1 and Cluster Tourists

After understanding the perceptions of tourists on the overall attractiveness of Singapore as a tourism destination, it would be appropriate to find out these tourists could be meaningfully segmented into different groups based on their perceptions of Singapore's attractiveness on the various destination attributes to determine whether this affects their perceptions of the IR's and satisfaction with Singapore as a tourism destination. The K-means clustering procedure was adopted to segment the tourists. The variables used to segment the market were nine destination attribute factors of Singapore. A cluster analysis was carried out and two-cluster, three-cluster and four-cluster solutions were examined. The two-cluster most differentiated between clusters. Cluster 1 perceived 'Infrastructure Attractions (0.88318) and Cluster 2 (0.26999) perceived 'Casino' as the most appealing factor. Refer to Table 38 and Figure 13 for details.

Table 38-Cluster 1 and Cluster 2 tourists

Nine factors	Cluster 1	Cluster 2
Infrastructure Attractions	0.88318	-0.40709
Tourism	0.29012	-1.3373
Culture activities	-1.6011	0.07380
Casino	0.58574	0.26999
Nature Tour	-3.2947	0.15186
Nightlife and Restaurant	0.06762	-0.3117
Environment Shopping	0.34273	-0.15798
Price Quality	-2.3088	0.10642
People	0.7893	-0.3638

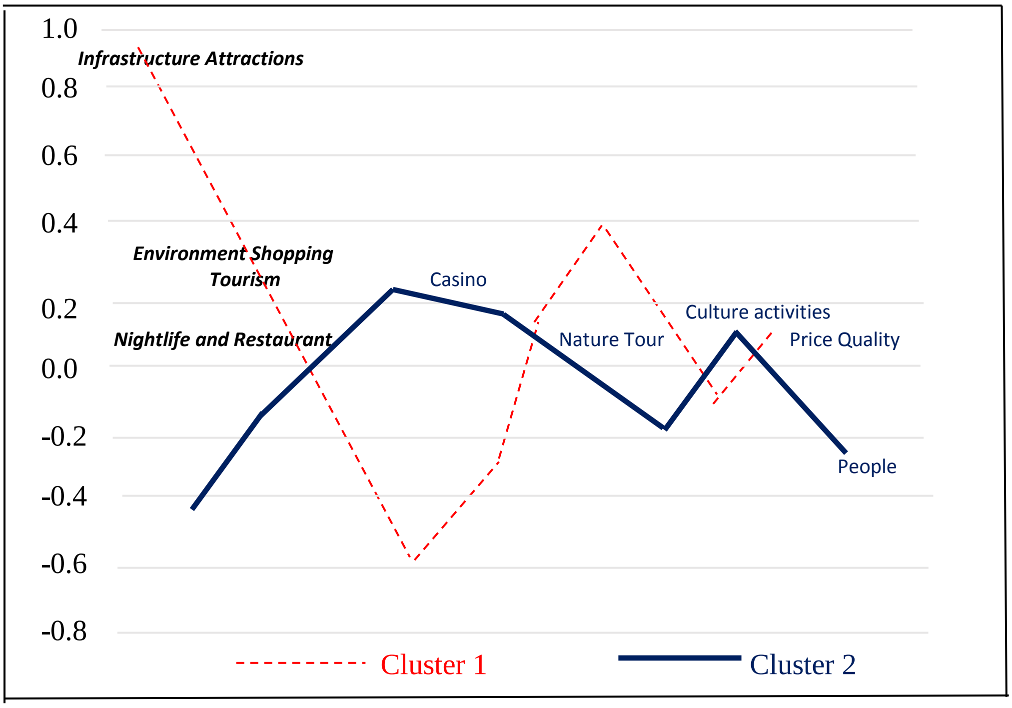


Fig.13-Two cluster analysis of tourists

There was no difference in the gender of respondents in the clusters. Respondents in Cluster 1 (64.7%) were more likely to have income below US$40,000 than respondents in Cluster 2 (49.0%) and to have a highs school diploma (25 vs 14.9%) as opposed to a bachelor's degree (60.3 vs 71.4%). Refer to Table 39 for details.

Table 39: Demographics of Cluster 1 and Cluster 2 respondents

	Cluster 1		Cluster 2		Chi-Square Test Pearson Chi-Square		
Gender (N=372)	**N**	**%**	**N**	**%**	**Value**	**df**	**Sig.**
Female	71	60.7	154	60.4			
Male	46	39.3	101	39.6			
Total	117	100	255	100	0.03[a]	1	0.957
Annual Household Income (US$) (N=371)							
Up to 40,000	75	64.7	125	49.0			
40,001-60,000	22	19.0	86	33.7			
60,001-80,000	14	12.1	39	15.3			
80,001-100,000	1	0.9	5	2.0			
More than 100,000	4	3.4	0	0			
Total	116	100	255	100	19.551[a]	4	0.001
Occupation (N=372)							
Administrative/managerial	17	14.5	32	12.5			
Professional	23	19.7	44	17.3			
Technical	4	3.4	14	5.5			
Sales and Service	12	10.3	28	11.0			
Clerical	4	3.4	6	2.4			
Production and transport	0	0	26	10.2			
Homemaker	8	6.8	30	11.8			
Retiree	3	2.6	9	3.5			
Students	32	27.4	54	21.2			
Other	14	12.0	12	4.7			
Total	117	100	255	100	23.023 [a]	9	0.06
Highest Education level (N=371)							
Primary school	3	2.6	3	1.2			
High school/College	29	50.0	38	14.9			
Bachelor's degree	70	60.3	182	71.4			
Postgraduate	14	12.1	32	12.5			
Total	116	100	255	100	6.924 [a]	3	0.074
Mean (N=372)	**Mean**	**SD**	**Mean**	**SD**			
Age	30.80	11.443	35.02	11.244	-3.334	369	0.001

There were significant differences between the two clusters with respect to the use of information sources before and during their visit to Singapore. Respondents in Cluster 1 were more likely than those in cluster 2 to rely on internet/websites (39.0%), travel guide books (26.3%), TripAdvisor (27.1%) and social media such as Facebook (17.8%) prior to their holidays. Cluster 2 respondents were more likely to rely on articles in newspapers/magazines (44.5%), travel agent/tour operator (37.1%), and accommodation providers (24.2%). Refer to Table 40 for details.

Table 40: Differences in sources of information - Planning a trip

	Cluster 1		Cluster 2		Chi-Square Test Pearson Chi-Square		
Sources of Information	**N**	**%**	**N**	**%**	**Value**	**df**	**Sig.**
Travel Guide books (n=64)	31	26.3	33	12.9	10.195[a]	1	0.001
Articles in newspapers/ magazines(n=143)	29	24.6	114	44.5	13.619[a]	1	0.000
Travel agent/tour operator (n=119)	24	20.3	95	37.1	10.471[a]	1	0.001
Accommodation providers (n=74)	12	10.2	62	24.2	10.045[a]	1	0.002
Internet/websites (n=72)	46	39.0	26	10.2	43.176[a]	1	0.000
Facebook (n=44)	21	17.8	23	9.0	6.042[a]	1	0.014
TripAdvisor (n=52)	32	27.1	20	7.8	25.149[a]	1	0.000

Once in Singapore, Cluster 1 respondents were more likely to depend on Visitor information centres (28.0%), Internet/websites (27.1%), friends/family members (24.6%), other travellers (14.4%), and TripAdvisor (6.8%). Cluster 2 tourists were more likely to depend on travel agents/tour operators (21.5%), and accommodation providers (18.8%). Refer to Table 41 for details.

Table 41: Differences in sources of information-During a trip

	Cluster 1		Cluster 2		Chi-Square Test Pearson Chi-Square		
Sources of Information	**N**	**%**	**N**	**%**	**Value**	**df**	**Sig.**
Travel Guide books (n=48)	29	24.6	19	7.4	21.246[a]	1	0.000
Other travellers (n=39)	17	14.4	22	8.6	2.922[a]	1	0.087
Friends/family members (n=56)	29	24.6	27	10.5	12.487[a]	1	0.000
Travel agent/tour operator (n=63)	8	6.8	55	21.5	12.468[a]	1	0.000
Accommodation providers (n=58)	10	8.5	48	18.8	6.508[a]	1	0.011
Visitor information centres (n=63)	33	28.0	30	11.7	15.222[a]	1	0.000
Internet/websites (n=67)	32	27.1	35	13.7	9.932[a]	1	0.002
TripAdvisor (n=12)	8	6.8	4	1.6	7.079[a]	1	0.008

Cluster 1 respondents were more likely than Cluster 2 respondents to visit the following tourism attractions including; Botanic Gardens (52.5 versus 40.1), Chinatown (69.5 versus 48.8), Night Safari (58.5 versus 36.7), Orchard Road (78.0 versus 51.2), Marina Bay Sands (78.0 versus 39.44), Resorts World Sentosa (61.0 versus 44.1), Universal Studios (70.4 versus 37.2), and Sentosa Island (77.1 versus 48.1). Cluster 2 respondents are more likely to visit attractions such as Jurong Bird Park (45.7 versus 42.3), Marine Life Park (30.4 versus 26.9), and the Maritime Experiential Museum (24.6 versus 20.3). Refer to Table 42 for details.

Table 42: Popular places of interests - Have/Plan to visit

	Cluster 1 (n=118)		**Cluster 2 (n=256)**		**Chi-Square Test Pearson Chi-Square**		
Places of interests	**N**	**%**	**N**	**%**	**Value**	**df**	**Sig.**
Asian Civilisations Museum	36	30.5	56	21.9	5.605[a]	2	0.061
Botanic Gardens	62	52.5	105	40.1	6.071[a]	2	0.048
Clarke Quay	80	67.8	133	52.0	8.826[a]	2	0.120
Chinatown	82	69.5	125	48.8	15.031[a]	2	0.001
Gardens by the Bay	73	61.9	144	56.3	2.395[a]	2	0.302
Jurong Bird Park	50	42.3	117	45.7	7.520[a]	2	0.023
Merlion Park	57	48.3	101	39.5	3.252[a]	2	0.197
Night Safari	69	58.5	94	36.7	22.186[a]	2	0.000
Orchard Road	92	78.0	131	51.2	24.585[a]	2	0.000
Zoological Garden	51	43.2	88	34.4	4.490[a]	2	0.106
Marina Bay Sands (MBS)	92	78.0	101	39.4	48.505[a]	2	0.000
MBS Casino	50	42.4	88	34.4	4.019[a]	2	0.134
MBS Skypark	52	44.0	89	34.8	3.382[a]	2	0.184
Resorts World Sentosa (RWS)	72	61.0	113	44.1	11.248[a]	2	0.004
RWS Casino	43	36.4	88	34.4	4.758[a]	2	0.093
Marine Life Park	33	26.9	78	30.4	6.449[a]	2	0.040
Maritime Experiential Museum	24	20.3	63	24.6	9.208[a]	2	0.010
Universal Studios Singapore	83	70.4	95	37.2	39.294[a]	2	0.000
Singapore Cable Car	54	45.8	91	35.6	3.905[a]	2	0.142
Sentosa Island	91	77.1	123	48.1	28.602[a]	2	0.000

4.4.8.1 Clusters 1 & 2 - Perception of Singapore as a tourism destination

It was observed that Cluster 1 respondents rated Japan (4.03), Sydney (3.75), Auckland (3.70), Bali (3.33) as more appealing destinations than Cluster 2 respondents. However, Cluster 2 respondents viewed Genting Highlands (3.07), Penang (3.06), Phnom Penh (3.01), Manila (3.02), Jakarta (2.95), Johor Bahru (2.96), and Mumbai (2.77) as more appealing destinations. Refer to Table 43 for details.

Table 43: Comparison of Singapore with other destinations in terms of attractiveness

Destinations (Rating scale 1=much less attractive, 5=much more attractive)	**Cluster 1 Mean**	**Cluster 2 Mean**	**t-value**	**Significant level (p=)**
Tokyo (Japan)	4.03	3.51	4.005	0.000
Taipei (Taiwan)	3.64	3.48	1.177	0.240
Sydney (Australia)	3.75	3.44	2.470	0.014
Seoul (South Korea)	3.60	3.38	1.595	0.113
Melbourne (Australia)	3.63	3.37	1.902	0.058
Auckland (New Zealand)	3.70	3.23	3.328	0.001
Dubai (United Arab Emirates)	3.37	3.29	0.527	0.599
Bali (Indonesia)	3.33	3.07	2.188	0.030
Hong Kong (China)	3.29	3.13	1.396	0.165
Bangkok (Thailand)	3.00	3.14	-1.162	0.246
Hanoi (Vietnam)	2.77	3.02	-1.794	0.075
Macau (China)	2.97	3.00	-2.00	0.841
Genting Highlands (Malaysia)	2.80	3.07	-2.585	0.010
Penang (Malaysia)	2.73	3.06	-2.554	0.012
Ho Chi Minh City (Vietnam)	2.82	2.93	-0.854	0.394
Phnom Penh (Cambodia)	2.46	3.01	-3.990	0.000
Manila (Philippines)	2.48	3.02	-4.205	0.000
Jakarta (Indonesia)	2.38	2.95	-4.633	0.000
Johor Bahru (Malaysia)	2.32	2.96	-5.5558	0.000
Mumbai (India)	2.22	2.77	-3.968	0.000

4.4.8.2 Clusters 1 & 2-Perception of IRs, Destination Image, and Tourism Experience in Singapore

Respondents were asked to if they agreed that the two IRs-Marina Bay Sands and Resorts World Sentosa have made Singapore a more appealing tourism destination. The rating scale was 1=strongly agree and 7-strongly disagree. The mean score for Cluster 1 respondents (2.18) were more likely than those in Cluster 2 (2.43) to agree that the IR's have made Singapore a more appealing tourism destination, however there was no significant difference in the degree to which they perceived the IR's as being consistent with their expectations of Singapore (-2.38). Cluster 1 respondents were more satisfied (1.96 vs 2.51) and more likely to say they would recommend to others to visit Singapore. Refer to Table 44 for detailed findings.

Table 44: Cluster 1 and Cluster 2

	Cluster 1 (n=118)	Cluster 2 (n=255)	T value	Significance level (p=)
IR on appeal of Singapore	2.43	2.18	-2.221	0.27
IR on consistency in tourism experience	2.38	2.52	1.270	0.205
Satisfaction with tourism experience in Singapore	1.96	2.51	-5.060	0.00
Recommend others to visit Singapore	1.93	2.45	-4.486	0.00

With respect to the six future scenarios for Singapore in 2025, the findings revealed that respondents in Cluster 1 were more likely to prefer that Singapore focus on the Vibrant Tropical City (11.22 vs 10.03) and a melting pot of Asian Culture (11.20 vs 9.61) scenarios when compared to respondents in Cluster 2. Details in Table 45.

Table 45: Cluster 1 versus Cluster 2 on 6 tourism scenarios

Destinations (Rating scale 1=much less attractive, 5=much more attractive)	Cluster 1 Mean	Cluster 2 Mean	T-value	Significance level (p=)
Family Wonderland	10.66	10.84	-0.356	0.723
Tropical City	11.22	10.03	2.91	0.004
Garden City	10.87	11.16	-0.391	0.698
Asian Culture	11.20	9.61	3.223	0.002
Medical Wellness	10.00	9.88	0.097	0.924
Sports Hub	11.16	9.96	1.90	0.059

4.4.8.3 Attraction of casino gambling to tourists

To determine if there were differences between the two clusters with respect to gambling behaviours and the importance of casinos to their travel decisions, respondents in Cluster 2 were more likely to have never gambled (33%) but also to gamble 2-4 times (36.1%) or more than four times (3.6%) per month. Refer to Table 46 for more details. Respondents in Cluster 2 were also more likely to indicate that they enjoy gambling while travelling (20.4%) and that casinos are an important (8.6%) or main (4.7%) reason for travel. Details are in Table 47.

Table 46: Differences in Frequency of gambling per month

	Cluster 1		Cluster 2		Chi-Square Test Pearson Chi-Square		
Frequency of gambling	**N**	**%**	**N**	**%**	**Value**	**df**	**Sig.**
Never	31	26.7	85	33.3			
Once per month	58	50.0	69	27.1			
2 to 4 times per month	27	23.2	92	36.1			
More than four times	0	0	9	3.6			
Total	116	100	255	100	24.684[a]	7	0.001

Table 47: Differences Importance of Casinos to Travel Decisions

	Cluster 1		Cluster 2		Chi-Square Test Pearson Chi-Square		
Frequency of gambling	**N**	**%**	**N**	**%**	**Value**	**df**	**Sig.**
I avoid visiting casinos while on holidays	35	30.2	95	37.3			
I'm not interested in visiting casinos while on holidays	61	52.6	74	29.0			
To visit casinos are not a major part of my travel decisions but I enjoy gambling when on holiday	18	15.5	52	20.4			
To visit casino plays an important part in my travel decision	1	0.9	22	8.6			
To visit casino is the main reason I travel	1	0.9	12	4.7			
Total	116	100	255	100	24.432	4	0.000

4.4.8.4 Attitude to gambling

An attitude to gambling scale was created by summing the responses to the two previous questions – a score of '2' would mean that a respondent 'never gambled' and 'avoid visiting casinos while on holidays and score of 6-9 indicates that a respondent gambled more than four times monthly and visiting casinos is the main reason for travel. Respondents were then grouped into 3 categories 'anti-gambling' if they scored 2 on the summed scale, 'neutral' if they scored 3-5 and 'like gambling' for those who scored 6-9. Details are in Table 48.

Table 48 – Attitudes to gambling

Attitudes to gambling	**N**	**%**
Anti-gambling	142	30.3
Neutral	263	56.1
Like gambling	50	10.7
Total	455	97.0
Missing	14	3.0
Total	469	100.0

When the clusters are compared on their attitudes to gambling, the findings revealed that more respondents in Cluster 1 were neutral (69.8 vs 51%), while those in cluster 2 were more likely to be either anti (33.3 vs 26.7%) or like (15.7 vs 3.4%) gambling. Refer to Table 49 for details.

Table 49-Attitudes to gambling

	Cluster 1		**Cluster 2**		**Chi-Square Test Pearson Chi-Square**		
Attitudes to gambling	**N**	**%**	**N**	**%**	**Value**	**Df**	**Sig.**
Anti-gambling	31	26.7	85	33.3			
Neutral	81	69.8	130	51.0			
Like gambling	4	3.4	40	15.7			
Total	116	100	255	100	16.162[a]	2	0.000

The relationship between attitudes to gambling and perceptions of the IR's was specifically examined. The results indicate the neutral respondents have a more positive perception compared to anti-gambling respondents with respect to the two IRs enhancing Singapore appeal as a tourism destination (2.21 versus 2.46). They also indicated that they are more satisfied with their tourism experience in Singapore than those in Anti-gambling or like gambling groups. The neutral respondents are also more likely to recommend others to visit Singapore (2.04 versus 2.57). Refer to Table 50 for details. (Scale: 1=like gambling, 3=dislike gambling)

Table 50: Perceptions of IRs and tourism experience

Statement	**Anti-gambling Mean**	**Neutral Mean**	**Like gambling Mean**	**F-value**	**Significant level (p=)**
IRs made Singapore more appealing tourism destination	2.46	2.21	2.38	3.064	0.048
IRs consistent with expectations of Singapore	2.59	2.39	2.34	2.097	0.124
Satisfaction with experience in Singapore	2.44	2.18	2.42	3.074	0.047
Likelihood to recommend others to visit Singapore	2.57	2.04	2.36	10.623	0.000

4.5 Chapter Summary

The survey on international visitors to Singapore revealed the following key findings:

The respondents rated the top three most popular tourist attractions as Orchard Road (60.3%), Sentosa (59.4%), tied third were Clarke Quay and Gardens by the Bay (56.1%). The three least popular attractions were Marine Life Park (28.6%), Asian Civilisations Museum (25.2%), and Maritime Experiential Museum (23.9%). Earlier Kau (1994) conducted a study and assessed the market receptivity of Tang Dynasty Village, a new theme park in Singapore, and found that among the 853 foreign visitors, the top three places of interest enjoyed most were Sentosa, Orchard Road and Zoological Garden. The three least popular attractions were Chinese Garden, Science Centre and Merlion Park. In comparison with this early study, Sentosa and Orchard have continued to appeal to tourists rather than the Zoological Garden over the last two decades.

Academic scholars have emphasized the importance of developing a strong destination brand identity to enhance destination image, boost visitation intention and build customer loyalty. Effective destination branding strategies can also lead to creating a potential competitive advantage over other destinations (Morgan et al., 2003; Murphy et al., 2007). The findings revealed that in terms of perceptions of IRs and the destination image of brand Singapore, more than 70% of respondents agreed or strongly agreed that the two IRs have enhanced the appeal of Singapore as a tourism destination. It also indicated that nearly 80% agreed or strongly agreed that visits to the two IRs was consistent with their expectations of their Singapore tourism experience. Seventy-three percent of respondents were not keen to visit casinos as only 8.4% like to patronize casinos as part of their trip itinerary. The study indicated that the majority of respondents are leisure and business tourists and they are attracted to visit the IRs in Singapore. This result can be seen as justifying the government’s vision of the acceptable structure of legalized casino gambling in Singapore, but more importantly the STB’s effective destination branding strategy in promoting the IRs as Singapore’s newest tourism product to boost the tourism sector.

The respondents also viewed Singapore favourably in terms of safety and security, providing a clean and litter free environment, and as a shopping paradise destination rather than being attracted by complimentary casino services and high roller clubs at the IRs. The findings were consistent with the study of Tak and Wan (2003) that Singapore was rated highly as a food/shopping paradise by tourists from North Asia. A link here can be made to the investigation by Kneesel et al. (2009) on four leading gaming destinations in U.S. which revealed that Las Vegas was rated highest in terms of overall image, recommendation and revisiting as it offers great entertainment, restaurants, weather, shopping, tourist attractions, customer service, value for money and casino promotions. In the context of Singapore, it is important to understand the main value-adding elements in destination choice or primary drivers for choosing a destination, rather than subsidiary ones such as gambling. The success of destination marketing strategies for Singapore will be enhanced if marketers can ensure that the delivery and design of tourism services are related to the values perceived as determining factors by consumers (McGuire, 1999; Yeonsoo et al, 2002). According to the Destination Loyalty (TDL) model, destination managers should seek to identify the tourist's pre-trip variables such as the dimensions highly valued by consumers and positive previous travel experiences which can affect the tourists' perceptions on destination image and customer loyalty (Gursoy et al, 2014).

Researchers thus propose destination marketers should identify and understand the perception of tourists to be able to implement marketing strategies effectively. Destination managers can compare the brand identity of a destination with the brand image perceived by consumers and introduce an effective communication strategy to ensure that the destination's brand identity matches the brand image perceived by consumers to increase visitation intention (Moufakkir, et al., 2004; Kneesel, et al., 2009). The study indicated that the respondents' perception of Singapore was modern (43.5%), cosmopolitan (35.6%), and culturally interesting (25.6%). More than 57% of respondents viewed the future tourism scenario of Singapore 2025 'Garden city-showcasing sustainable urban living' as most appealing and 'Medical and Wellness tourism (49.1%) as least appealing. The findings support those of previous studies that found that successful destination branding requires marketers to focus in creating/enhancing a brand identity that matches the perceived brand image of consumers. Marketers recognize that tourists are more likely to visit a destination if the perceived brand personality matches with one's ideal personality (Ekinci and Hosany, 2006).

Gaming destination marketers also believe that it is important to distinguish the perceptions of gambling tourists and non-gambling tourists to be able implement successful marketing strategies effectively (Moufakkir, et al, 2004; Kneesel, et al, 2009). To determine if perceptions of Singapore and the IR's were influenced by differences in the appeal of destination attributes, respondents were segmented into two clusters. Cluster 1 tourists are those attracted by the infrastructure and attractions offered in Singapore. They also rate Tokyo, Sydney, Melbourne and Auckland as appealing tourism destinations on these variables. They also tend to agree more than Cluster 2 respondents that the IRs have enhanced Singapore's destination attractiveness. Cluster 2 tourists preferred casino gambling, price and quality when they visited

Singapore. They rated Phnom Penh, Manila, Genting, Johor and Mumbai as more appealing tourism destinations for this reason also. They tend to perceive that the IRs are consistent with their expectation of Singapore but are less satisfied with their tourism experience in Singapore and less likely to recommend others to visit the city-state.

Chapter 5

Local residents' views of the IRs in Singapore

Chapter Outline

5.1 Introduction

This part of the study sought to determine the perceptions and evaluations by the local residents of Singapore regarding the IRs, including the two casinos. The academic literature has emphasized the importance of fully comprehending the attitudes and perceptions of local residents to enable the sustainable launching of casino and/or IR tourism projects. It is of value for destination managers to consider the contemporary frameworks such as Social representation theory (SRT), Social capital (SC), Social exchange theory (SET), Gaming Impact Perception Matrix (GIPM) and the Gambling tourism support model (GTSM) to fully understand and to address the concerns of the community towards the IR's. The present study explores both the merits and demerits of integrated resorts in Singapore. Additionally, the researcher seeks to determine if the IR strategy has enhanced the city-state's destination competitiveness and improving the welfare of the local residents.

5.2 Strategies to manage the impacts of Singapore's Integrated Resorts

There is evidence that the Singaporean government recognizes the social implications of legalizing casino gambling in the city-state. The strict measures introduced by the government are arguably important in regulating the two IRs in Singapore. It will be useful to consider the effectivness of the three regulatory measures imposed currently by the government. They are an entrance levy of S$2,000 a year or S$100 per entry, a system of exclusions for local residents, and inhibiting casinos from extending credit to the local population. All these measures are aimed at deterring local residents from casino gambling.

The National Council on Problem Gambling (NCPG) was set up in August 2005, by the then Ministry for Community Development, Youth and Sports (MCYS) as part of the Singaporean national framework to address problem gambling. The NCPG has two key roles: to provide advice and feedback to the Ministry of Social and Family Development (MSF) on social concerns related to gambling problems; and to support and implement effective programs with regards to public education, public communication and consultation of stakeholders, responsible gambling (RG) programmes by operators, research on problem gambling and prevention and treatment services for problem gamblers and their families. For example, the Responsible Gambling (RG) programme at RWS aims to provide patrons with an enjoyable gaming experience by encouraging responsible gambling and is committed to the prevention of problem and underage gambling in the premises, ensure regulatory compliance with all applicable laws and regulations and to collaborate with the government, responsible gambling bodies and the community to minimize any negative social impacts due to gambling in the casino. In November 2015, RWS Casino became the first casino in Asia Pacific to receive RG Check accreditation from the Responsible Gambling Council (RGC). RWS also has set-up its own RG committee, RG Independent Advisory Panel, RG ambassador and RG facilities (RWS Company Information, 2016). MBS also introduced the pre-commitment programme available free-of-charge for patrons to plan their gambling expenditure beforehand by voluntarily setting a limit on their gambling expenditure over a 24-hour period (MBS Company Information, 2016).

As noted in Chapter 1 and 2, foreign visitors are given free admission to the casinos but local residents are deterred from patronizing the casinos via a levy of S$100 per visit or S$2,000 for annual membership. Officials have claimed that locals who are in financial distress or receiving social assistance will also be barred. The minimum age to enter the casinos is 21 years and above. Singaporeans are also able to exclude themselves or family members by applying for exclusion orders. There are three types of casino exclusion: a) self-exclusion (exclude yourself), b) family-exclusion (immediate family members exclude someone, c) third-party exclusion (automatic exclusion for those who are undischarged bankrupts or receiving financial aids from the government. Any Singaporean or Permanent resident aged 21 and above is qualified to apply for casino exclusion order (NCPG, 2011). There are concerns about the effectiveness of the exclusion order strategy to deter addictive gamblers (residents and foreigners) from patronizing the casinos as there are alternative forms of gambling available. These points are reiterated from discussion in earlier chapters because the management play a key role in how tourists represent the IRs as their social influence.

The Singapore government proposed amendments to the Singapore Casino Control Act with the aim to contain a rise in gambling addiction in the city-state two years after the two casino resorts were opened. According to the acting Minister for Community Development, Youth and Sports, Mr Chan Chun Sing told The Straits Times newspaper that “We want to protect vulnerable groups from the potential harm of casino gambling,”

The government has faced public criticism over its 2005 decision to end a longstanding ban on casino gambling and opened its first licensed casino resorts in early 2010, a move aimed at transforming the island-states into a vibrant tourism hub. But critics say that the country is flirting with a social disaster, while proponents say casinos helped the economy by tapping the growing affluence of Asian travellers and accelerating growth in companies catering to the wealthy. A survey by the NCPG found that the average monthly betting amount in Singapore had risen 20% since 2008 to S$212 while the proportion of Singapore residents who gambled more than S$1,000 on average each month also increased (REUTERS, 2012).

5.3 Methodology and Instrumentation

Several previous studies have used a questionnaire to investigate residents’ perceptions of casino developments in, for example, both in Macau (Vong and McCartney, 2005) and in the United States (Chhabra and Gursoy, 2007). A study using a computer assisted telephone interviewing (CATI) survey was conducted with residents in U.S. communities including Sioux City, Iowa, St Joseph, St Louis City, St Louis County, Missouri, Alton, Peoria, East Peoria, Illinois, Biloxi and Mississippi and revealed residents’ perceptions on the negative impacts of casinos on crime rates and quality of life within their communities (Stitt et al., 2005).

As an example of using theoretical ideas about public issues, Wagner et al. (1999) conducted a study on the ontogenesis of gender. They looked at the public sphere in Brazil, the images on British television, images of androgyny in Switzerland, individualism and democracy in post-communist Europe. All of these topics were linked by metaphorical thinking about conception. Three methods were adopted to generate the data, firstly, content analysis of the leading seven mass media firms, focus groups with the citizens in the street, and narrative interviews with politicians. The focus group focused on discussion about the situations in the streets and in political life. The narrative interviews drew on the conceptual value of story-telling as one of the most fundamental forms of human communications and one which is considered a particularly useful method in the study of social representations. This interplay of methods to explore significant social representations represent some useful guidelines for the present work. For example, evidence from Wagner et al, (1999) suggest that focus groups are a valid research tool as they allow respondents to elaborate their public views and attitudes. The data obtained enable researchers to have an in-depth understanding of residents' perceptions on tourism development and community topics.

For this study, a qualitative focus group methodology was adopted with the objective of gathering more in-depth perceptions and attitudes of local residents concerning the IRs and casinos in Singapore. Two strategies were employed to recruit potential participants: initial reliance on business associates and personal contacts, and a snow-ball technique i.e. referrals by contacts. The investigator invited personal contacts of different age groups, below 21, 31-40, 41-50, and above 60 years old to participate in the focus group study. Those locals who agreed to participate also approached their own friends and relatives to consider being potential participants in the focus group study. When potential participants communicated their verbal acceptance of the invitation to participate in the focus group, the investigator forwarded to these participants a recruitment letter and information sheet one week in advance of the session. Participants could choose any of the four sessions scheduled – 9.30am, 11.30am, 1.30pm and 4.30pm on 25 October 2014. The investigator also ensured that the sample comprised different demographic characteristics such as gender, age groups, religions, ethnic groups, marital status, occupation, and educational background. This allowed the researcher to investigate perspectives from local residents of diverse background.

A total of 35 residents participated in the focus groups. An external moderator was engaged in facilitating the four focus group sessions – Session A (11 participants), Session B (8 participants), Session C (9 participants) and Session D (7 participants) on 25 October 2014 at James Cook University, Singapore (JCUS) classroom. The duration of each focus group session was between 60 minutes-90 minutes. The study consisted of two sections – firstly, respondents are asked to complete a short questionnaire to provide their demographic characteristics - age, gender, occupation, ethnicity, educational level, and annual household income. These demographic measures are based on the Singapore Department of Statistics and research study by Arthur et al. (2008) on problem gambling behaviour among university students in Singapore. Secondly, the moderator led three topics for discussion with the respondents. These topics were based on local residents' perceptions of the IRs; perceived benefits versus costs of casino gambling, and opinions on the measures by government to curb social costs associated with casino gambling. The preparations for the actual focus group sessions included booking of two classrooms at JCUS – one used as a waiting area and the other classroom was for the focus group discussion. The moderator is a highly experienced corporate trainer and facilitator. A research assistant was engaged to be in-charge of the waiting area where participants were given incentives – a $10 NTUC Fairprice supermarket voucher, a corporate namecard holder, two Singapore Food Festival kitchen aprons and a JCUS keychain. When the participants arrived, they were directed to the waiting room and served with light snacks and drinks. They also watched a 50 minutes youtube video clip titled 'Megastructure Singapore Marina Bay Sands Documentary' and were presented with printed brochures on addictive gambling from Singapore Pools and NPCG. Once they were ready, the research assistant led the group of participants to the focus group session room to meet the moderator and the investigator. The purpose of presenting these materials was to prepare the respondents to talk about issues raised in and by these focused images and test.

The moderator welcomed the group of participants and each participant had a name tag on the table. The investigator assured the groups that the content discussed in the sessions would be confidential. The moderator briefed the respondents on how to complete the questionnaire on their profile and completed questionnaires were returned to the investigator. There were 13 questions prepared in powerpoint presentation format and additional information in the form of newspaper articles and video clips was also used. Refer to Appendix 5-1. Each participant was given a file containing articles and brochures. The moderator guided the session according to the stipulated questions. The investigator took down key points highlighted during the focus group sessions. All the four sessions were recorded using video camera and a voice recorder to enable the researcher to analyse the data collected accurately. After the participants attended the scheduled session, each participant received a thank you letter and incentives as a token of appreciation. Refer to Appendix 5-0 for a guide to the questions adopted in the focus group discussion. Appendix 5-1 outlines the kinds of resources such as newspaper articles, pictures, youtube video clips used by moderator when conducting the focus group sessions.

The approach to interpreting the data and presenting the findings in a meaningful form by mapping the participants' views and perceptions of the IRs was based on earlier tourism studies that analysed first-time visitors' experiences in Mumbai, Seoul, Singapore and Tokyo (Martin and Woodside, 2011; Martin, Woodside and Dehuang, 2007). In both of these studies, the researchers analysed the good/bad stories of respondent experiences by mapping their concepts such as persons, places, acts, outcomes, beliefs, and linked the stories that reflected individual positive or negative sentiments. For this study, mapping technique will be adopted to illustrate the 'positive' and 'negative' perceptions of the respondents. A mapping is clearer and easier to interpret the findings, for example, a respondent can give further examples or share stories to support his/her views. The profile of respondents is also included in the mapping so it is easier to understand if a particular issue tends to have more positive or negative views from a certain age group. The aim of a mapping is to highlight the views in a pictorial form which makes analysis of data more meaningful and accurate interpretations.

It is acknowledged that when content analysis is adopted in qualitative research analysts must ensure reliability is achieved through at least two different researchers coding the same body of content. Data interpretation also requires a link to academic frameworks such as social representations or specific gambling related conceptual theories. For this study, the inter-coder reliability process involved discussion with other academic staff on the key themes highlighted in the focus group sessions. An academic colleague developed his own set of codes based on the notes taken during the focus group sessions, and compared this with the proposed codes made by the investigator. He also assessed the mapping diagrams and discussed them in detail with the investigator.

5.4 The Sample

A total of 35 participants (34 Singaporeans, 1 Permanent resident) participated in the focus group study. The participants comprised of 25 males and 10 females. Of the 35 participants, seven were aged below 21 years, eight participants were aged between 21-30, six participants between 31-40, four participants between 41-50, six participants aged between 51-60 and four participants aged above 60. There were 18 singles, five participants were married with no children and 12 were married with children. The majority of participants were of Chinese (C) ethnic background (27) and eight were Malays (M). There were eight Muslims, seven Buddhists, four Protestants, two Catholics and 14 ‘Other’ religious groups. The participants hold various occupations such as senior management (SM), professionals (PO), marketing (MK), executives (EX), technical specialists (TS), self-employed (SE), tertiary students (TS), homemaker (HO), and retirees (RE). Thirteen participants had an annual household income below $40,000 and only three participants above $100,000. Participants 21, 24 and 27 did not indicate their annual household income. Fourteen participants were degree holders, eleven were diploma holders and only one participant completed primary education. Refer to Table 52 for a profile of the participants.

Table 52: Demographics of Participants

SN	S/P	M/F	Age group	Marital status	Ethnic group	Religion	OCCU	Annual Household Income(S$)	Highest Edu level
1	S	M	21-30	Single	Malay	Muslim	MK	<=40000	Degree
2	S	M	21-30	Single	Chinese	Buddhism	TS	60001-80000	Diploma
3	S	M	<21	Single	Malay	Muslim	TS	<=40000	O level
4	S	M	<21	Single	Malay	Muslim	TS	<=40000	O level
5	S	F	<21	Single	Chinese	Buddhism	TS	<=40000	O level
6	S	F	<21	Single	Chinese	Taoist	TS	<=40000	O level
7	S	M	21-30	Single	Chinese	Protestant	MK	<=40000	Degree
8	S	M	<21	Single	Malay	Muslim	TS	<=40000	O level
9	S	M	21-30	Single	Chinese	Nil	TS	80001-100000	Degree
10	S	M	21-30	Single	Malay	Muslim	PO	40001-60000	Degree
11	S	F	<21	Single	Chinese	Buddhism	TS	<=40000	O level
12	S	M	41-50	Single	Chinese	Catholic	EX	40001-60000	Degree
13	S	M	31-40	M(NC)	Chinese	Christian	PO	40001-60000	Diploma
14	S	M	21-30	Single	Chinese	Christian	MK	<=40000	Degree
15	S	F	41-50	M(C)	Chinese	Other	PO	40001-60000	Diploma
16	S	M	21-30	Single	Chinese	Buddhism	TS	<=40000	Diploma
17	S	M	31-40	Single	Chinese	Other	PO	60001-80000	Degree
18	S	F	31-40	M(C)	Chinese	Christian	SM	40001-60000	Degree
19	S	M	21-30	Single	Chinese	Buddhism	PO	<=40000	Diploma
20	S	M	>60	M(C)	Malay	Muslim	RE	<=40000	O level
21	S	F	>60	M(C)	Malay	Muslim	HO	-	Primary
22	S	M	31-40	M(NC)	Chinese	Catholic	PO	80001-100000	Degree
23	S	M	51-60	M(C)	Chinese	Other	PO	80001-100000	Diploma
24	S	M	>60	Single	Chinese	Other	RE	-	Diploma
25	S	F	31-40	M(NC)	Chinese	Other	HO	80001-100000	Diploma
26	S	M	51-60	M(C)	Chinese	Buddhism	TS	60001-800000	Diploma
27	S	F	51-60	M(C)	Chinese	Buddhism	Other	-	O level
28	S	M	31-40	M(C)	Malay	Muslim	SM	40001-60000	O level
29	S	F	41-50	M(C)	Chinese	Other	HO	80001-100000	Diploma
30	P	M	51-60	M(C)	Chinese	Christian	SM	>100000	Degree
31	S	M	<21	Single	Chinese	Christian	TS	>100000	Diploma
32	S	M	>60	M(C)	Chinese	Other	RE	<40000	Degree
33	S	M	51-60	M(C)	Chinese	Protestant	Other	60001-800000	Degree
34	S	M	51-60	M(NC)	Chinese	Protestant	SE	>100000	Degree
35	S	F	41-50	M(NC)	Chinese	Protestant	Other	80001-100000	Degree

Note: S=Singapore Citizen, P=Permanent Resident M(NC)=Married without children, M(C)=Married with children, OCCU=occupation, Highest Edu level=Highest education level

5.5 Results

To begin the focus group discussion, the moderator presented the current tourism situation in Singapore based on tourism statistics from 2009-2013. In 2010, tourist arrivals increased by 20.2 per cent and coincided with the launched of the two IRs. Participants were asked what reasons they thought accounted for Singapore having more international visitors. The nine reasons frequently mentioned by participants included; attractions (6), casinos (4), IR (4), Formula 1 (4), hub (3), Sports tourism (2), safety/safe (2), MICE (1), and multicultural (1). There were six participants who highlighted attractions as the main reason. Their list of attractions included; casinos (4), Universal Studios Singapore (2), Adventure Cove, SEA Aquarium, Zoo, Night Safari, River Safari, and Gardens by the Bay. Only participant 12 (M, 41-50) disagreed that the casinos are drivers of visitation. Four participants considered that the IR's are Singapore's key attractions as they enhanced the overall branding and marketing strategy. However, participant 24 (M, >60) warned that "the IR could be a money-laundering centre for rich people supported by the financial sector." Four participants rated the Formula 1 (F1) favourably being the only night race in the F1 Grand Prix circuit since 2008. This event was perceived to make Singapore an exciting destination. The participants believed that the newly opened Sports Hub, built on the site of the old National Stadium which hosted the 2014 Women's Tennis Association (WTA) event also helped to enhance Singapore's image as a sports tourism destination. Other key factors mentioned were perceived safety and being multicultural. The consensus from the participants is that Singapore is attractive due to a combination of factors rather than any one specific factor, including the influence of Casinos. Refer to Figure 14 for the mapping of the perceived reasons why more tourists are visiting Singapore.

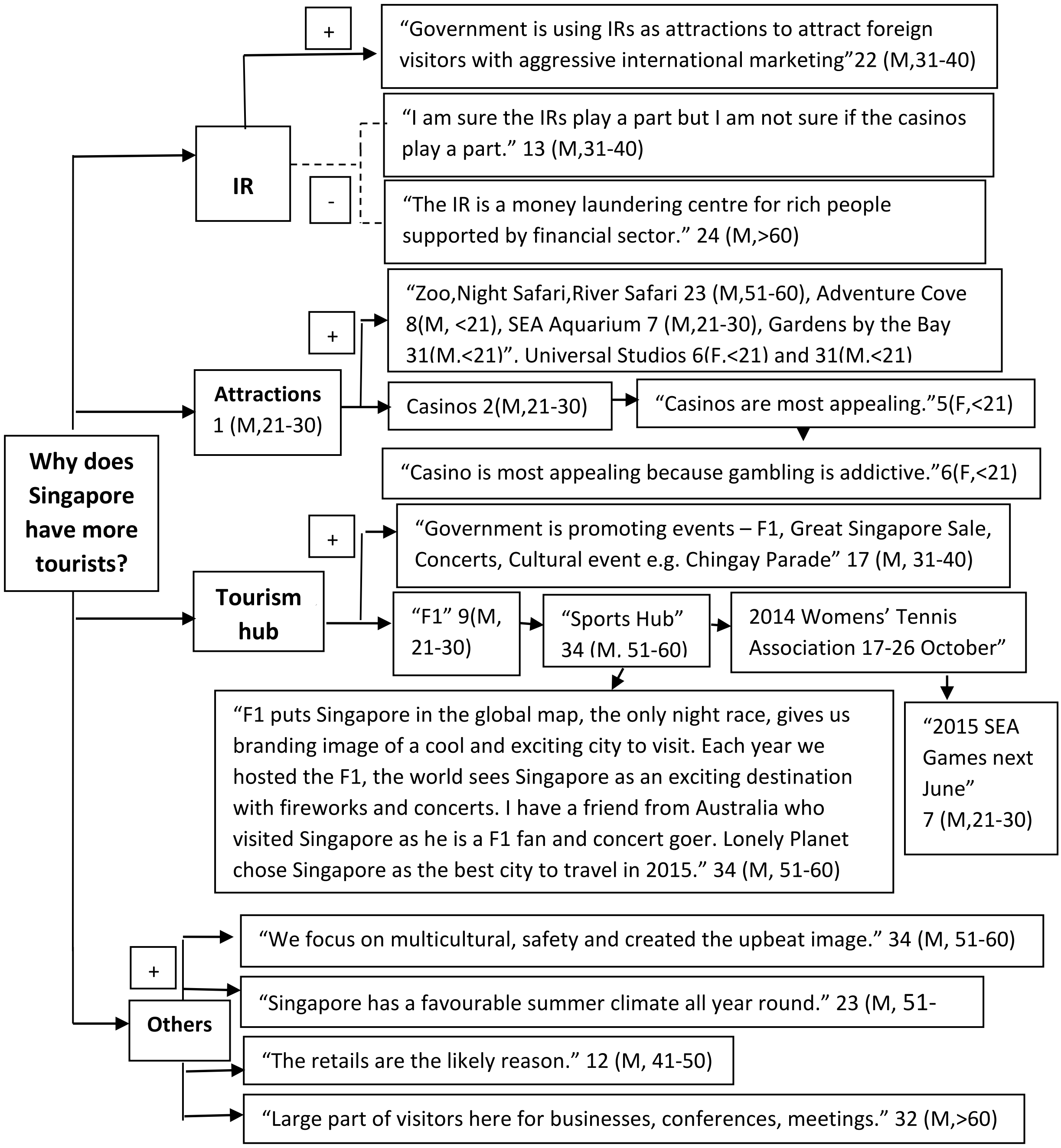


Fig 14-Mapping of why Singapore has more tourists

Next, the participants were shown a slide and background on the six future scenarios for tourism in Singapore in 2025. This similar question was asked in Study 2 of visitors to Singapore and was also included here as there is a need to determine residents' perceptions of proposed tourism developments. The academic literature suggests that local residents' support is vital to the sustainable success of tourism initiatives. Scenario Four-Tropical Vibrant City drew the most support with seven respondents favouring this option and S2-Family Oriented Wonderland was least favoured with only one supporter. This was in contrast to the ratings by tourists in the survey questionnaire. The tourists rated the appeal of the six tourism scenarios of Singapore in 2025 in the ranking order; Scenario A-Garden city (10.99), Scenario B-Family Oriented Wonderland (10.75), Scenario D-Vibrant Tropical city (10.29), Scenario F-Sporting Hub of Asia (10.24), Scenario C-Melting Pot of Asia (10.14) and Scenario E-Medical Tourism and Wellness (10.01).

For Scenario A-*Garden city* scenario, participant 10 (M, 21-30) thought that a clean and green Singapore would be a drawcard for tourists. Participant 28 (M, 51-60) noted gardens in his neighbourhood and more developments in the Jurong area. However, participant 18 (F, 31-40) disagreed as she thought that Garden city was more appealing to locals. Participant 33 (M, 51-60) felt that "Garden city was quite tired." For Scenario B-*Family oriented wonderland* scenario, participant 4 (M, <21) believed that tourists were keen to visit man-made attractions and like theme parks rather than parks. Participant 35 (F, 41-50) argued that Singapore has land constraints in enabling development of more theme parks.

For Scenario C-*Melting pot of Asia* scenario, there were two supporters. Participant 25 (F, 31-40) felt that "Singapore is a multicultural country with different cultures and races." Participant 24 (M, >60) noted that foreigners would see different colours of people working together in the same office. Participant 35 (F, 41-50) added that she could try many things at one place at one go. However, participant 10 (M, 21-30) suggested that this scenario was more appropriate for Malaysia as Singapore was too westernized.

For Scenario D-*Vibrant tropical city* scenario, there were seven positive perceptions. For example, participant 2 (M, 21-30) suggested Singapore could have more musical festivals. Participant 3 (M, <21) viewed that Singapore could attract affluent tourists. Participant 16 (M, 21-30) believed more retail shops would see more people come here to buy and sell clothes. Participant 18 (F, 31-40) suggested more high-end restaurants, besides retail shops. Participant 29 (F, 41-50) perceived Singapore as a visitor shopping destination. Participant 10 (M, 21-30) viewed Singapore as the centre of Asia and believed that it should organized more events like the F1, concerts and mega stars and more visitors could visit Singapore. Participant 33 (M, 51-60) also liked this scenario.

For Scenario E-*Medical & Wellness* tourism scenario, there were five supporters. Participant 15 (F, 41-50) noted there were more hotel development to cater to medical tourists in Singapore. Participant 35 (F, 41-50) perceived that medical tourism appeal to travellers who could afford and do not receive good treatment in their country of origin. Participant 10 (M, 21-30) believed Singapore has good medical infrastructure to promote medical tourism. Others who agreed were participants 29 (F, 41-50) and 33 (M, 51-60). However participant 18 (F, 31-40) observed that the high exchange rate could result in Singapore being less competitive in the region.

Three participants perceived Scenario F-*Sporting Hub of Asia* scenario favourably. Participant 3 (M, <21) stated that sports tourism involved international teams and would also attract fans and tourists. Participant 33 (M, 51-60) believed that the new Sports Hub would allow Singapore to organize mega events to attract more foreigners. Participant 35 (F, 41-50) also liked this scenario. Refer to Figure 15 for the mapping of the six future scenarios for tourism in Singapore in 2025.

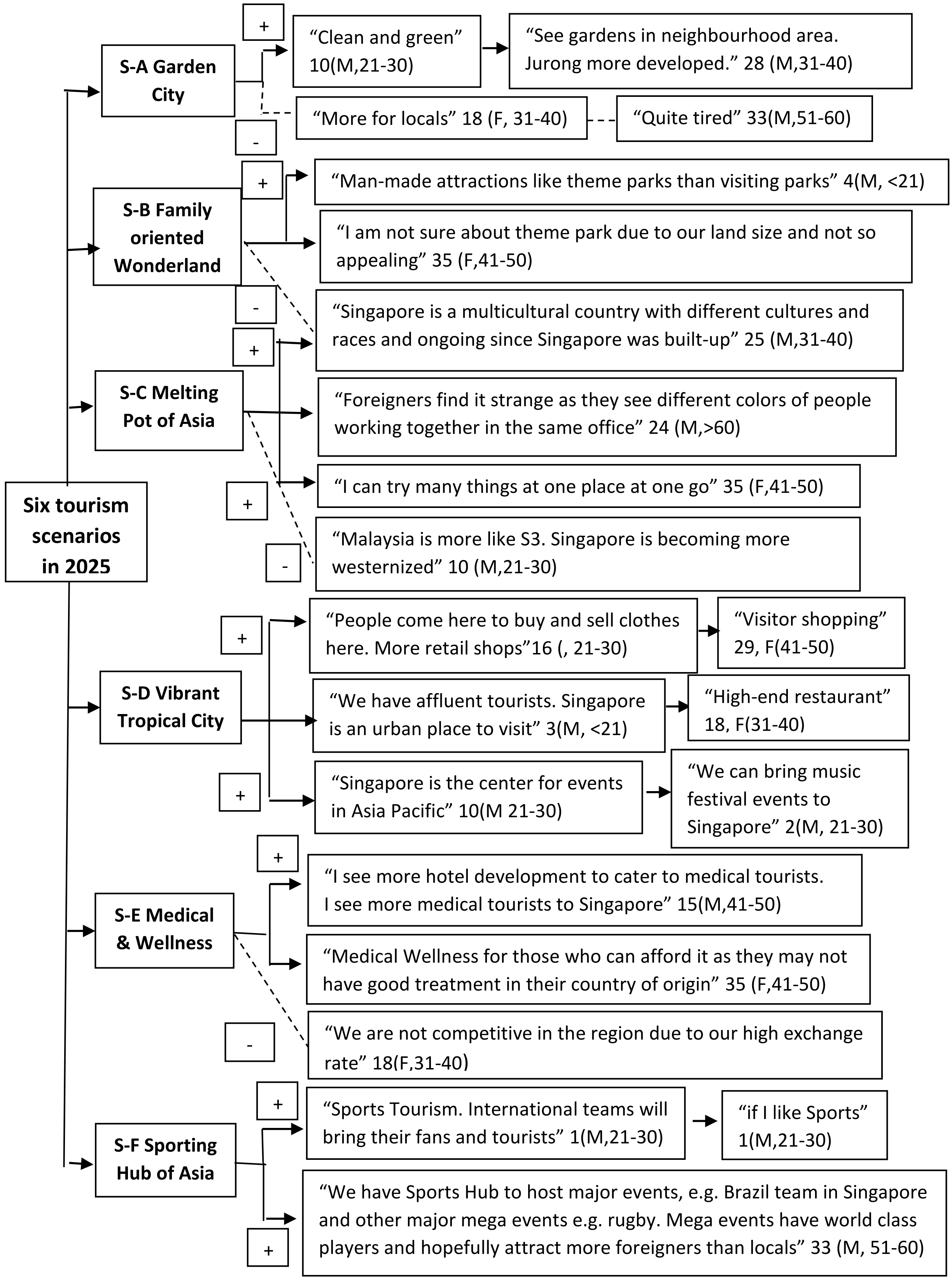


Fig 15-Mapping of six tourism scenarios in 2025

Participants were presented with the article titled ‘S’pore is top Asian pick for China tourists’ published by a local paper ‘My Paper’ dated 22 August 2013. The article claimed that Singapore emerged as the top destination in Asia that tourists from China most wanted to visit in the next 12 months. This was based on a survey by travel booking website, Hotels.com of more than 3,000 Chinese travellers and more than 1,500 hoteliers around the world. This could be attributed to Singapore’s reputation as a safe country, offering historical and cultural sites and value-for-money. China is reported as an increasingly important source market for tourism industries around the world tourists spending US$102 billion (S$130 billion) on overseas vacation in 2012 (My Paper, 2013).

The participants were asked what factors attracted tourists from China to visit Singapore. Fifteen participants mentioned the culture (food and language) and history of Singapore as being appealing to Chinese tourists. Participant 11 (F, <21) viewed that Chinese tourists liked to have a cultural experience in Singapore. Three participants cited ‘history’. For example, participant 24 (M, >60) pointed that the Chinese perceived Singapore as Little China. Participants 30 (M, 51-60) and 34 (M, 51-60) highlighted tourists were keen to know the history of the immigrants in Singapore. Five participants suggested food as a key factor. For example, participant 24 (M, >60) noted that the Chinese tourists prefer to eat Chinese food.” Participant 30 (M, 51-60) indicated Singapore offered a variety of food. Six participants believed that Chinese tourists like to visit the city-state as they could communicate in Chinese language and blend well in Singapore. However, both participants 30 (M, 51-60) and 34 (M, 51-60) pointed out that “Chinese tourists want to experience English speaking countries in Asia.”

Two participants suggested Singapore site as a location/international hub was the key factor. For example, participant 18 (F, 31-40) indicated that Singapore is centrally located as an international hub so Chinese tourists could travel from here to other destinations. Some participants indicated other appealing factors of Singapore as a tourism destination. Participants (17 M, 31-40) and 18 (M, 31-40) suggested that the Chinese were seeking opportunities for work and education. Participant 13 (M, 31-40) suggested that Singapore would be a one-stop location in terms of shopping experience, attractions, and entertainment. Participant 10 (M, 21-30) added fresh air. Participant 27 (F, 51-60) viewed that “Singapore people are friendly and kind.” Refer to Figure16 for mapping the factors why Chinese tourists liked to visit Singapore.

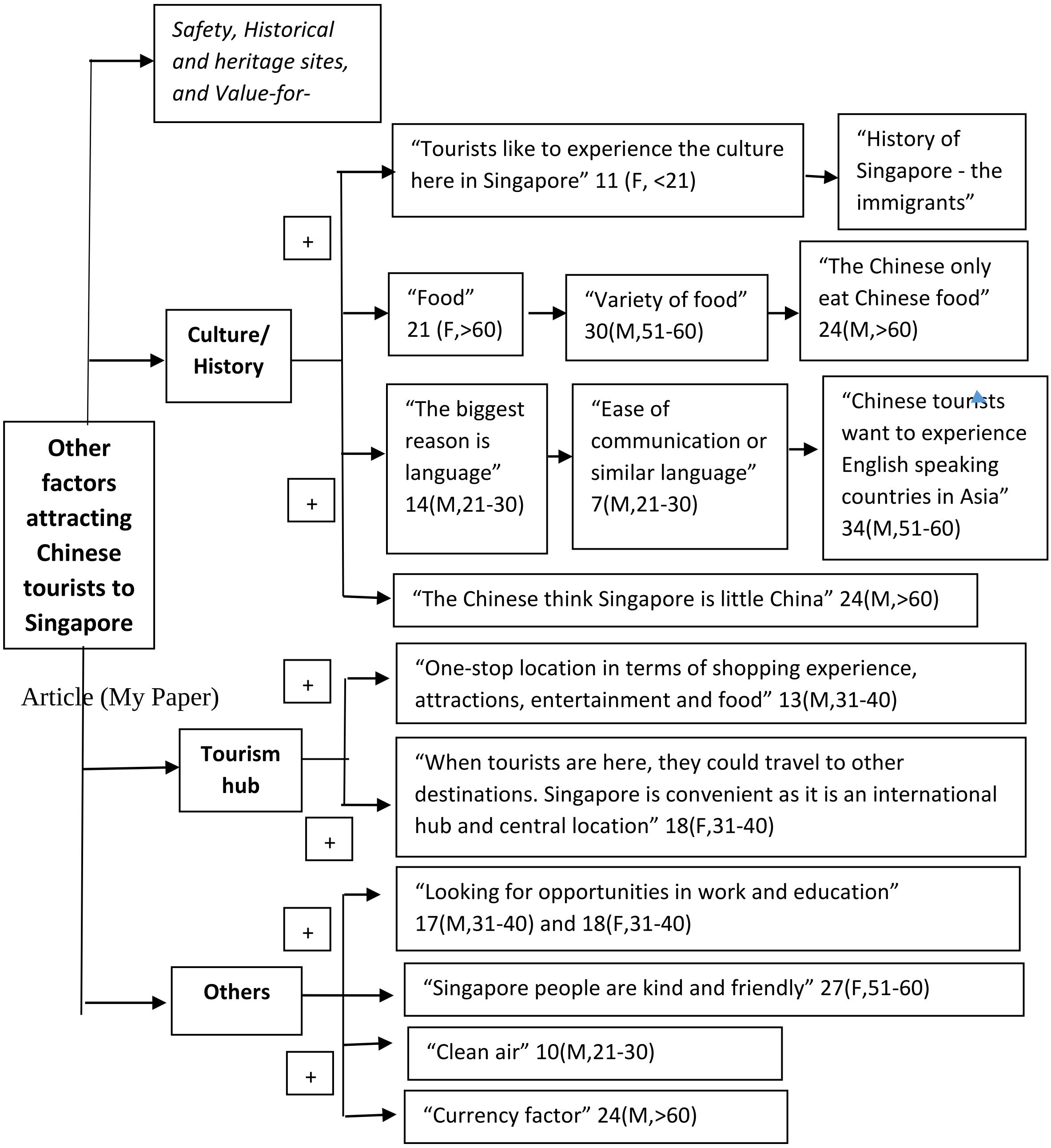


Fig 16-Mapping of Other factors attracting Chinese tourists to Singapore

Participants were next shown two newspaper articles reporting positive news of the two IR's – 'Singapore casinos trump Macau with tourism aces' and 'IRs lauded for promoting tourism'. The article on 'Singapore casinos trump Macau with tourism aces' emphasized the two popular IRs as Singapore's newest tourism strategy. It suggested that this strategy seems to have been effective as tourist arrivals reached 14.4 million in 2012, up by 50 per cent compared to 2009. The article on 'IRs lauded for promoting tourism' recognized the achievements of the two IRs for delivering unique experience for visitors and won accolades in the Singapore Experience Awards 2011.

Participants were asked if they agreed with the articles – that the Integrated Resort (IR's) were an effective tourism strategy for Singapore. Seven participants agreed that the IR's were a good marketing strategy. Participants 6 (F, <21) and 9 (M, 31-40) noted the IRs offered activities for both parents and their children. Participant 10 (M, 21-30) noted higher tourism growth after the two IRs were launched in 2010. Participant 13 (M, 31-40) suggested that Singapore should package the IR for tourists to pick and match in terms of shopping, food, cultural heritage, and casino gambling. Participant 20 (M, >60) argued the casinos are vital to the IRs attractiveness. Participant 7(M, 21-30) perceived that MBS and RWS enhanced the IRs brand image. In short, participant 12 (M, 41-50) felt that the IRs enhanced tourism experience for visitors.

Four participants had reservations whether the IR was truly an effective tourism strategy to attract visitors to Singapore. For example, participant 1(M, 21-30) argued that the IR was only part of the tourism attractions and the hype was gone. Participant 10(M, 21-30) agreed that the IR's appeal started to plateau and Singapore needs to consider launching a new IR to boost the number of visitors. Other participants 13 (M, 31-40) and 35(F, 41-50) believed that Singapore should offer shopping, food, cultural heritage, besides casino gambling and the IR was not a sustainable tourism product to attract repeat visitors to the city-state. Refer to Figure 17 for mapping if the IR is an effective tourism strategy for Singapore.

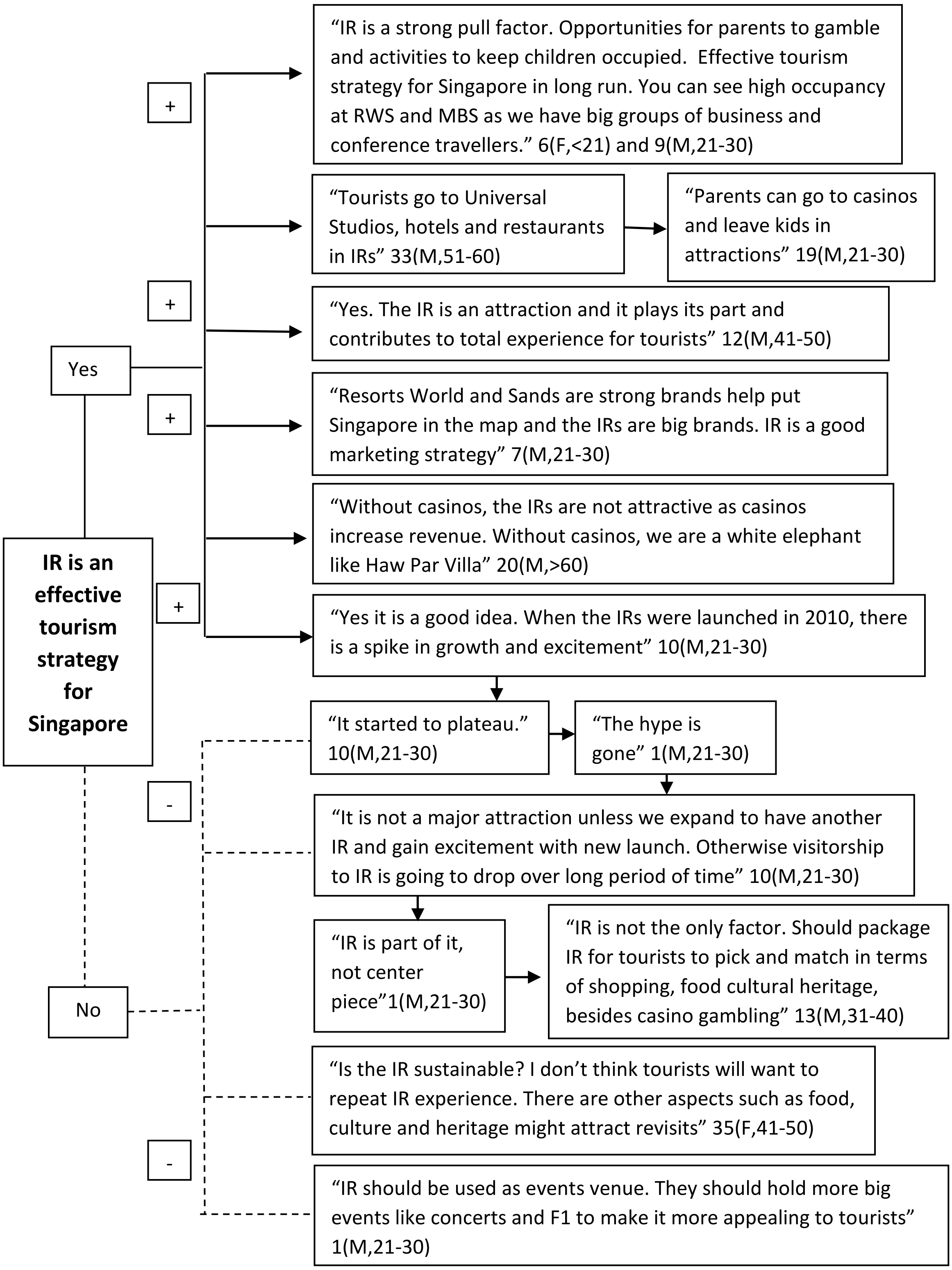


Fig.17 – Mapping if the IR is an effective tourism strategy for Singapore

Participants were asked to share a story of their own or of a friend or family member affected by the IR. The objective of this question was to identify the incorporation of the personal anchors in forming the ‘social representations’ of casino gambling in Singapore. Personal anchors and the process of anchoring ideas about public development topics like tourism are used in the previous tourism literature to explain why people develop and hold to their views (Pearce, et al., 1996). There were seven positive and five negative stories about personal experiences with the IRs. The common themes in the positive stories were food, job opportunities, excitement such as theme park, and entertainment such as shows and concerts. For example, participants 34 (M, 51-60) and 35 (F, 41-50) viewed that the IRs helped Singapore to be more exciting with entertainment and more choices in food. Participant 11 (F,<21) agreed as there were more places to visit and more entertainment offered at the IRs. Participant 31 (M,<21) was excited because locals, especially students could visit the SEA Aquarium and enjoyed Halloween Nights at the Universal Studios. Participant 18 (F,31-40) noted that the locals liked to visit the MBS, Universal Studios and the Gardens by the Bay on weekends and public holidays. A delighted participant 15 (F, 41-50) added that her family members spent good times together at the IR without the need to go overseas. There were more entertainment and shows periodically because of the IRs, according to participant 32 (M>60). Participant 10 (M, 21-30) believed there are more job opportunities and people could be inspired to own branded items from shopping at the IRs to be in the social elite group.

However, the IRs and casino gambling also come with social costs as illustrated by the five negative stories in which participants mentioned social evils associated such as increase in crime rates like murder cases and loan shark activities. Participant 9 (M,21-30) shared a story of his friend’s mother whose family issued an exclusion order to deter her from addictive gambling at the casinos. Participant 10 (M,21-30) was concerned with the potential increase in crime rates.

Two participants shared interesting but contrasting stories on the impact of IR on their immediate family members. Participant 6 (F, <21) said that her grandmother, a gambling addict, patronized the IR casinos every day and suffered losses and had to sell her house. However, her supportive family members still helped her grandmother as they trusted her. “The IRs actually improved my family’s quality of life as her family bonded well in times of difficulty”. However, participant 4 (M, <21) shared a different story as his girlfriend’s quality of life was affected by the fact that her neighbour was a compulsive gambler and borrowed money from loan sharks. She did not feel safe at home as the loan sharks vandalized the walls and harassed the neighbours.” Refer to Figure.18-Mapping of the impact of IR on personal stories and social capital.

Other participants did not like the entertainment at IRs as they were costly according to participant 20 (M, >60) with prices between $300-400 for a family of five. Participant 29 (F,41-50) agreed especially when customers are dining at the Michelin rated restaurants. Participant 18 (F, 41-50) noted that people need to queue when they were at the crowded IRs.

Participants were shown a video clip titled ‘Social Capital’ (The CQL, 2010). It defined ‘Social Capital’ as trusting relationships that would allow individuals to support and to solve problems together. It stated that social capital would promote quality of life as it was what individuals built up within the community and allowed you to work with others within a network as everyone needed to have relationships with all kinds of people. It also involved creating trusting relationships and opportunities to help others in our community and improved the quality of life. They were then asked if they believed that the IRs impacted the social capital of Singaporean residents. Participant 11 (F, <21) indicated that she could have a wider scope of friends, and like participant 13 (M,31-40), access to more entertainment and recreational activities at the IRs. Participant 9 (M, 21-30) added that he could spend more time with family and friends as the IRs were fun and interesting. Participant 15 (F, 41-50) mentioned her quality of life improved as she could have opportunities to exercise by brisk walking at the Gardens by the Bay. Participant 35 (F, 41-50) was pleased that her community was having more food options rather than visiting the casinos at the IRs. However, participant 2 (M, 21-30) was concerned that with more casinos, more friends would gamble.

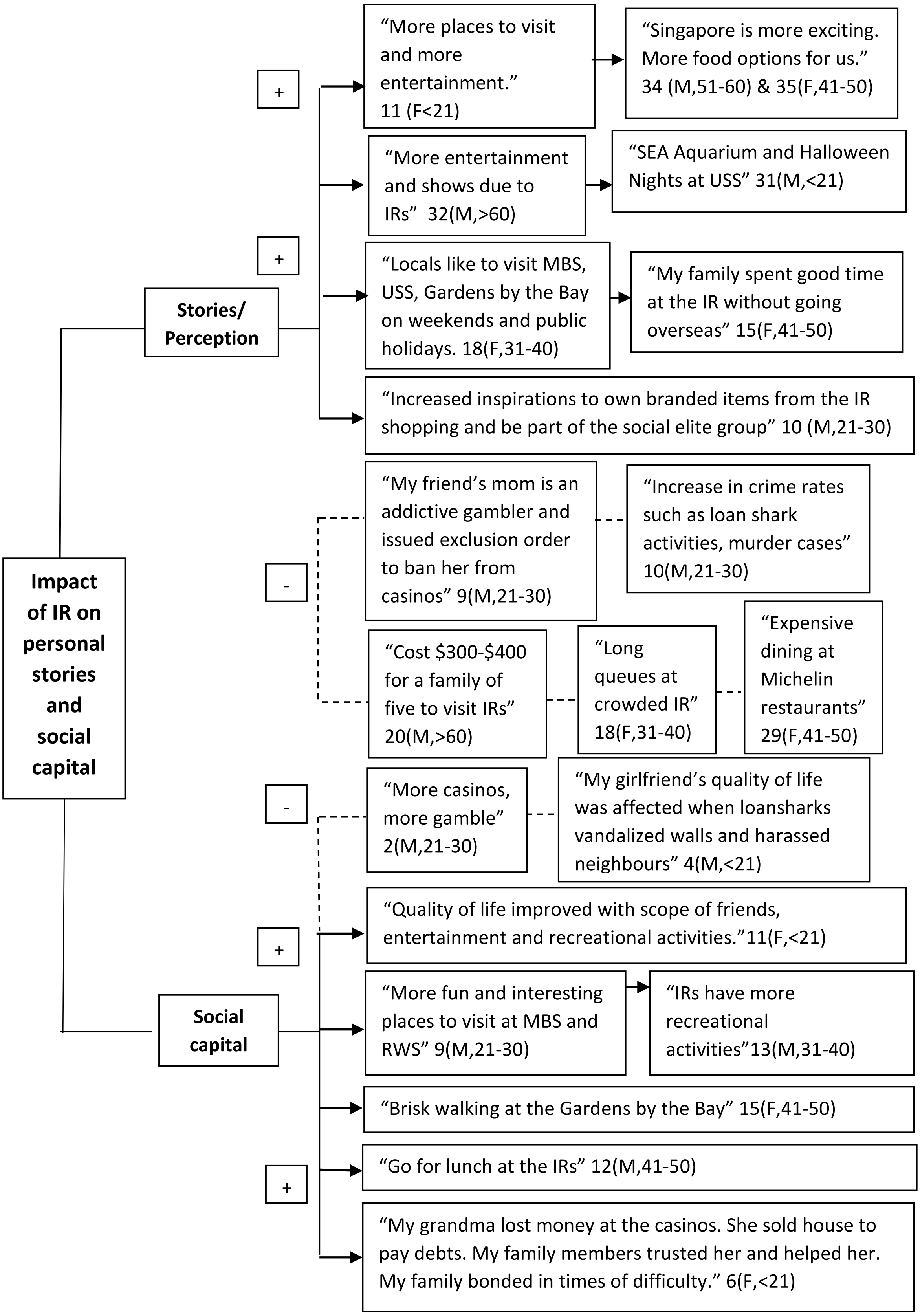


Fig.18-Mapping of the impact of IR on personal stories and social capital

Next, participants were shown a 1-minute ‘Anti-gambling advertisement in Singapore’ video clip (Bluroom’s channel, 2008) which featured a man begging his daughter to trust him and give him her savings in a piggy bank so that he can gamble again. Participants were asked to consider the benefits and costs based on social, economic, environmental and infrastructure in promoting Singapore as a casino tourism destination.

The participants highlighted that casino tourism resulted in economic, social and infrastructure benefits for Singapore. There were nine supporters of economic benefits, for example, four participants-5(F, <21), 4(M, <21), 16 (M, 21-30), and 34 (M, 51-60) viewed that casino tourism would boost tourism receipts, revenue, economy and country as a whole. Participant 8 (M, <21) emphasized this would attract high net worth gamblers, and with higher taxation revenue, we can make Singapore more vibrant according to participant 12 (M, 41-50). Participants 10 (M, 21-30), 14(M, 21-30) and 23(M, 51-60) indicated the job opportunities resulting from the IR developments. There were two supporters of social benefits. Participant 7 (M, 21-30) was pleased that the government had loosen up in controlled measures and made Singapore a more progressive society and participant 10 (M, 21-30) believed tourism bridged closer gap between residents and foreign visitors. When the IR operators upgrade its product, this would make modernized Singapore with better infrastructure development according to participant 18 (F, 31-40).

There were nine participants concerned with the social costs and economic costs associated with casino gambling in Singapore. Social costs were the main concern among local residents. Four participants - 7 (M, 21-30), 14 (M, 21-30), 19 (M, 21-30) and 26 (M, 51-60) - were concerned with crimes, debt creation, fraud, theft, money laundering, and illegal money lending. Other respondents - 1 (M, 21-30), 9 (M, 21-30) and 11 (F, <21) cautioned that addictive gambling could lead to broken families and bankruptcies. Participant 2(M, 21-30) indicated potential increases in suicide rates. Regarding economic costs, participant 18 (F, 31-40) cautioned that aggressive marketing of casino tourism could have a negative impact on the destination image of Singapore -leading to a perception as a gamblers haven. Participant 7 (M, 21-30) warned there could be social and political instability due to disagreement in views.

Next, participants were asked if they thought that the two casinos are sustainable tourism attractions and would continue to attract visitors. Four participants agreed that the casinos could continue to attract gamblers. Participant 20(M, >60) viewed that casino tourism would be so successful that the government might even launch two new IRs in 10 years' time. Participant 33(M, 51-60) argued that Singapore is successful because it offers ease of communication, excellent VIP services, accessibility and safety compared to other gaming destinations. Other participants - 24(M, >60) and 34 (M, 51-60) - also supported casino tourism. There were six local residents who disagreed with casino tourism as Participants 3(M, <21), 10 (M, 21-30) and 17 (M, 31-40) argued that tourists did visit Singapore because of casinos, which are only part of the whole tourism package. Participant 7 (M, 21-30) argued that his relatives from Malaysia did not find Singapore's casinos special and that Singapore would lose its edge to Japan and South Korea, and according to participants 14 (M, 21-30) and 1(M, 21-30) – eventually plateau. Refer to Figure 19-Mapping of the benefits and costs of promoting Singapore as a casino tourism destination.

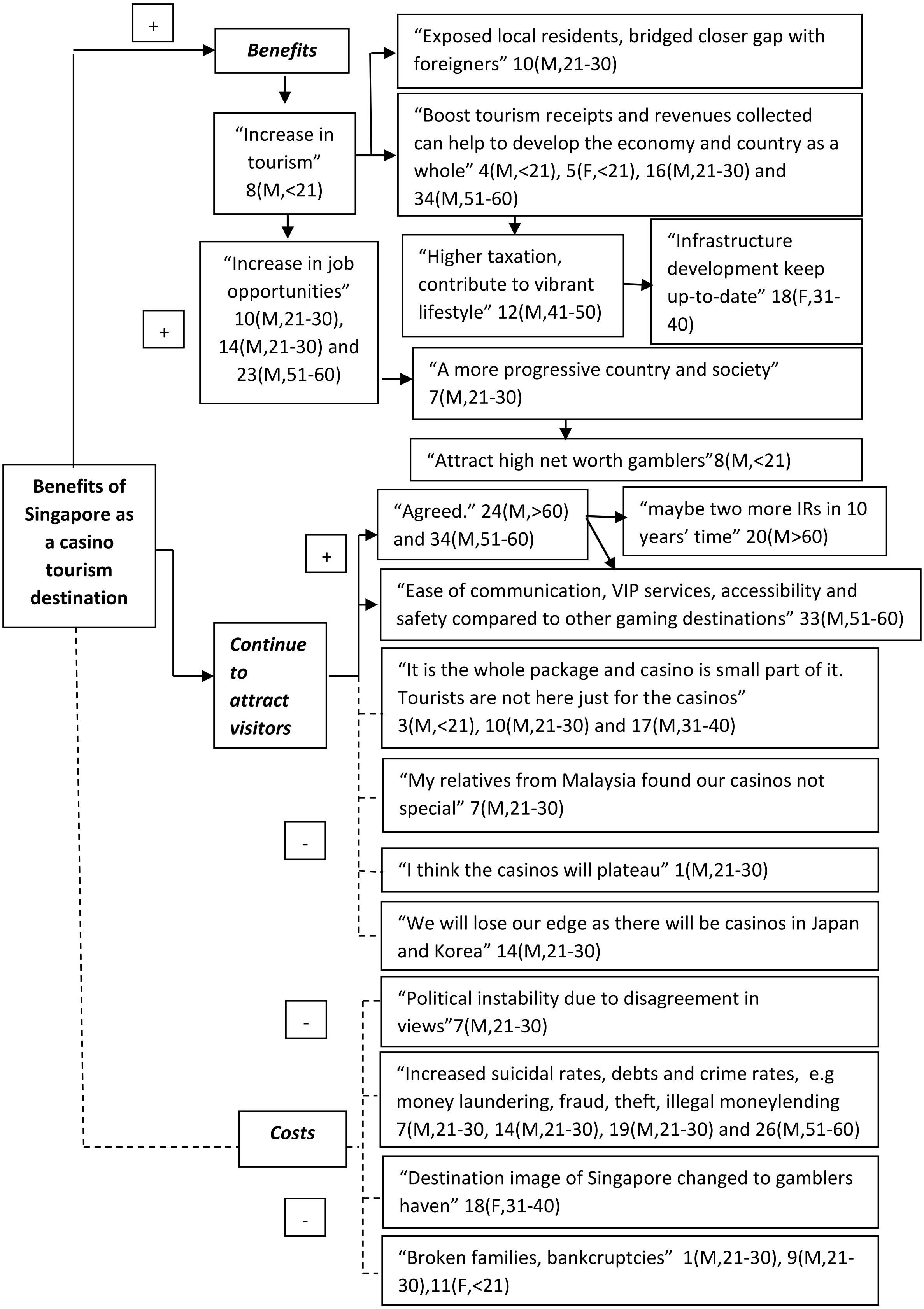


Fig. 19-Mapping of the benefits and costs of promoting Singapore as a tourism destination

Participants viewed a 3-minutes video clip titled ‘Government plans more problem-gambling safeguards’ (News in Singapore, 2012). The video claimed that many were concerned if the presence of casinos had led to problem gambling in Singapore. It was reported that problem gamblers rose from 1.2 per cent in 2008 to 1.4 per cent or 40,600 of the total adult population in 2011.

The slides also showed the details of the current levy imposed on local residents and $70 million of levies were collected within three months. Participants were asked if the levy $100 (daily)/$2,000 (annual) are effective in deterring locals from patronizing the casinos. Three participants agreed that the entry level worked on social or small-time gamblers. For example, participant 12 (M, 41-50) agreed as he shared a story on how his friend, a stopped patronizing the casinos after the levy was imposed on local residents. Participant 27 (F, 51-60) argued that without entry levy, more locals would enter the casinos.

Eight participants disagreed that the entry level was effective in deterring locals from patronizing the casinos. For example, participant 6 (F, <21) argued addictive gamblers were lured of winning from the casinos. Participant 14 (M, 21-30) felt the amount was insignificant whereas in Korea, locals were banned from entering the casinos. He also shared a story of how his friend’s aunt visited casinos for three consecutive days and for several weeks as free food was served at the casinos. Participant 12(M, 41-50) added the casino has a lounge for customers to rest as well. It was ineffective since the government collected S$70 million in entry level within three months, according to participant 28 (31-40). Two participants 7(M, 21-30), 24(M, >60) and 32(M, >60) felt the levy should be increased to $500 or even $1,000 and $20,000 (annual membership) respectively. Participant 22(M, 31-40) viewed the levy targeted at low-income residents but unfortunately, participant 30(M, 51-60) noted some low-income earners placed bets as much as $1,000. He also suggested that the government could consider closing the casinos altogether. Refer to Figure 20 for details.

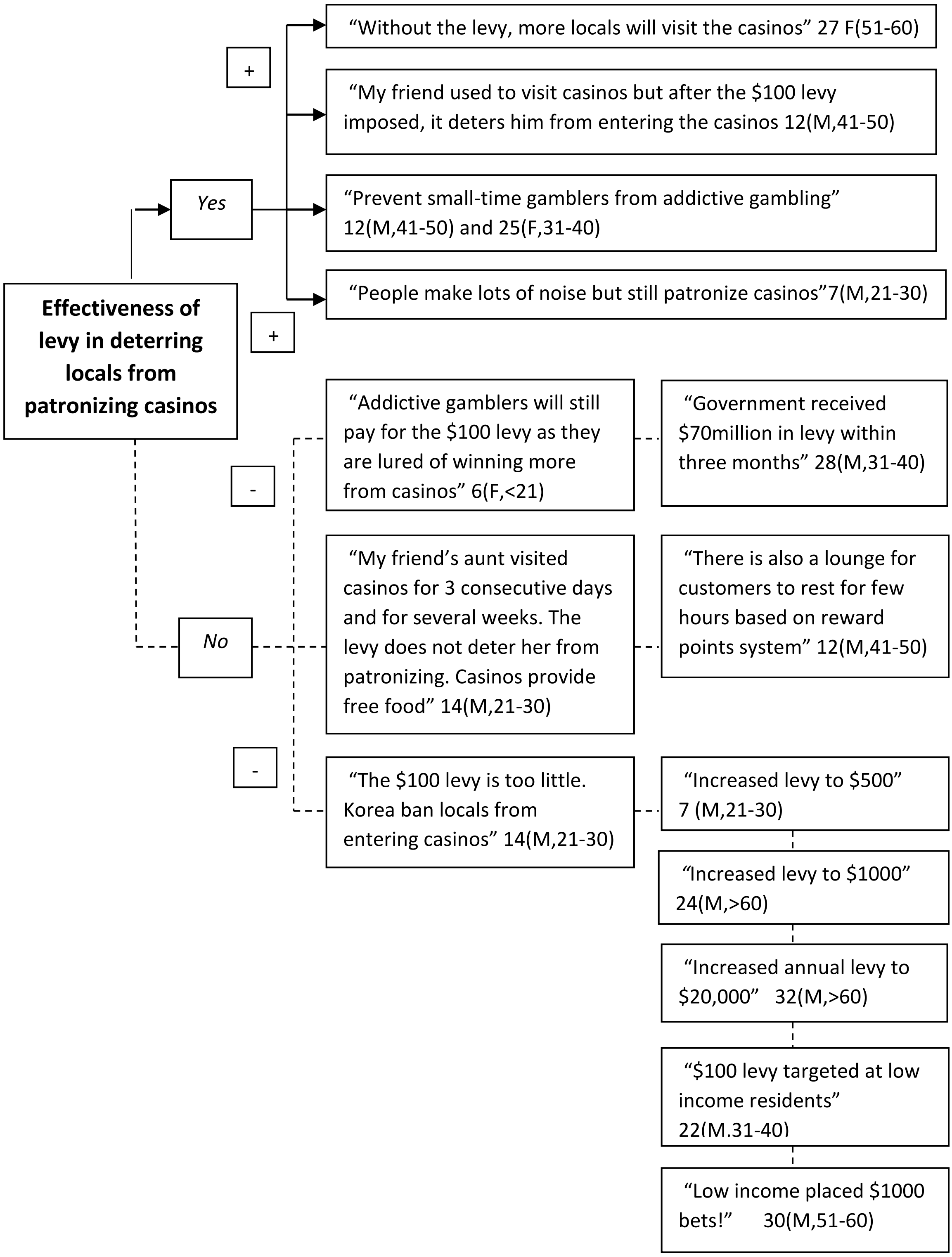


Fig. 20-Mapping of effectiveness of levy in deterring locals from patronizing casinos

An article on ‘Call to protect vs freedom of choice’ was distributed to the participants. This article focused on the government’s effort in implementing social safeguards to tackle the problem of addictive gambling in Singapore. It was reported that pathological gamblers among local residents were a mere 1.4 per cent in 2011, a slight increase from 1.2 per cent in 2008 before the casinos were opened. Social safeguard measures include; entry levy of $100 (daily)/$2,000 (annual membership) for Singaporeans and Permanent residents to enter casinos, and three types of exclusion orders – self, family, and third party. It claimed that only 5 per cent of locals in Singapore patronized the casinos, compared to 25 per cent in Macau. There were suggestions of tighter forms of social safeguards such as to increase the entry levy and to remove the annual membership as it seems to be a discount and encourage more to patronize casinos.

They were also asked if the voluntary exclusion order was an effective safeguard and deterrent to local residents from visiting the casinos. Three participants agreed it was effective. For example, participant 12(M, 41-50) cited the earlier story of the family who applied exclusion order for their addictive gambling aunt, and also those on social assistance, participant 18(F, 41-50). However, other participants questioned the effectiveness of the voluntary exclusion order. For example, participant 7(M, 21-30) viewed that it was impossible to change addictive gambling habit as there were other choices of gambling. People would bet 4-digit (4D) game with little money, participant 6(F,<21) added. Three participants 31(M,<21), 30(M,51-60) and 34(M,51-60) noted that this measure was applicable within Singapore only. People could choose to go to Tanah Merah, Genting, Batam or Thailand according to participants 19(M, 21-30), 20(M, >60) and 26(M, 51-60). Participant 34(M, 51-60) emphasized the importance of enforcement to make safeguards effective.

Next, the participants were asked if they could recommend other measures so Singapore could enjoy economic success and curb social evils of casino gambling at the same time. There were few suggestions. Participant 30 (M, 51-60) suggested if it was possible to impose a total ban on casino gambling it would lead to two different perceptions from others. Participant 32 (M, >60) disagreed as he believed casinos would continue to stay. He thought if the government could adopt social education by publishing stories of families who suffered from addictive gambling. However, participant 14 (M, 21-30) hoped that the government could ban low income earners from patronizing casinos. Refer to Figure 21 to determine effectiveness of voluntary exclusion order or other measures as effective safeguards.

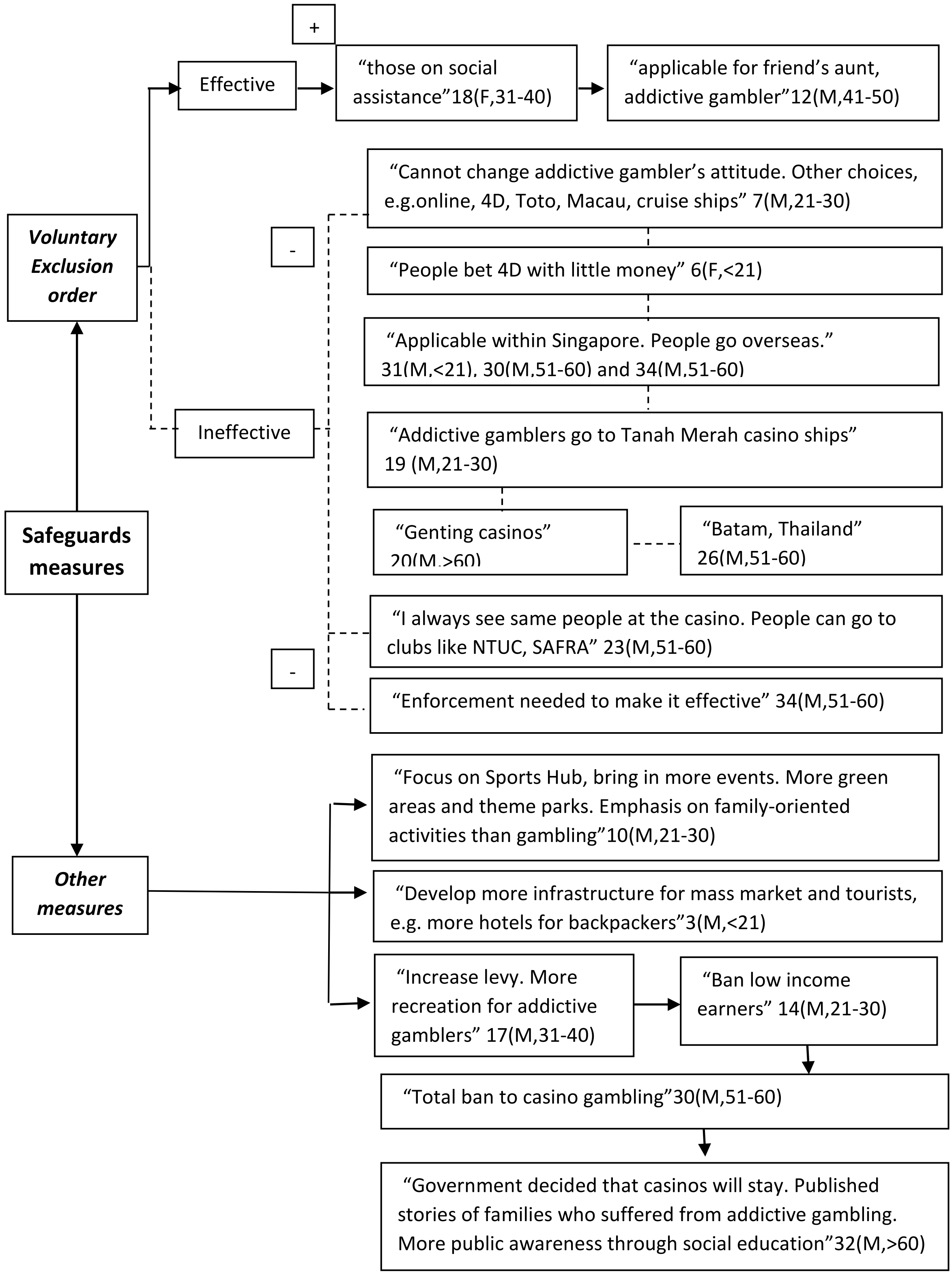


Fig.21-To determine effectiveness of voluntary exclusion order or other measures as effective safeguards

The government was concerned with the trend of remote gambling especially in Singapore. Participants were asked if they have participated in remote gambling and 34 participants denied except participant 7 (M, 21-30) who said "yes but it was a long time ago." Participant 14(M, 21-30) did not participate in remote gambling because "technology was unsafe and lack of sound effect." Participant 12(M, 41-50) indicated not interested while participant 17(M, 31-40) indicated lack of funds to participate in remote gambling. Participant 31 (M, <21) shared an interesting story, "I have seen peers betting online through 7 illegal bookies controlling these websites. People only need to deposit money to his account to gamble." Two participants expressed concern that there was a need to instil public education to those vulnerable group aged 16-17 years old.

All 35 participants disagreed when asked if the government should ban remote gambling as enforcement was an issue and advancement in technology. Participants 3 (M, <21) and 16 (, 21-30) explained that there were too many technological options available online and too many online gambling websites available. Other barriers include; "easy to open an online gambling account," said participant 15(F, 41-50) and "it was not possible to detect online gambling activities", participant 28 (M, 31-40) added. Monitoring is also difficult as participant 30 (M, 51-60) found that "these gambling websites have created different names other than the word 'gambling' when google search on internet." Though participant 26 (M, 51-60) suggested "ban the Apps", participant 23 (M, 51-60) disagreed since the government was promoting the Totaliser agency and it was impossible to ban due to advancement in technologies. Participant 24 (M, >60) added that his friends preferred to bet online on soccer as it offered better odds.

A concerned participant 34 (M, 51-60) emphasized two key points, firstly, parents should be informed and be aware of such issues, secondly, it was important to understand the remote addictive gambler community, and their families who suffered from this. Participant 35 (F, 41-50) added that it was also vital to impart values regarding downsides of gambling to the younger generations. Refer to Figure 22 on mapping the participation in remote gambling and the government ban on remote gambling.

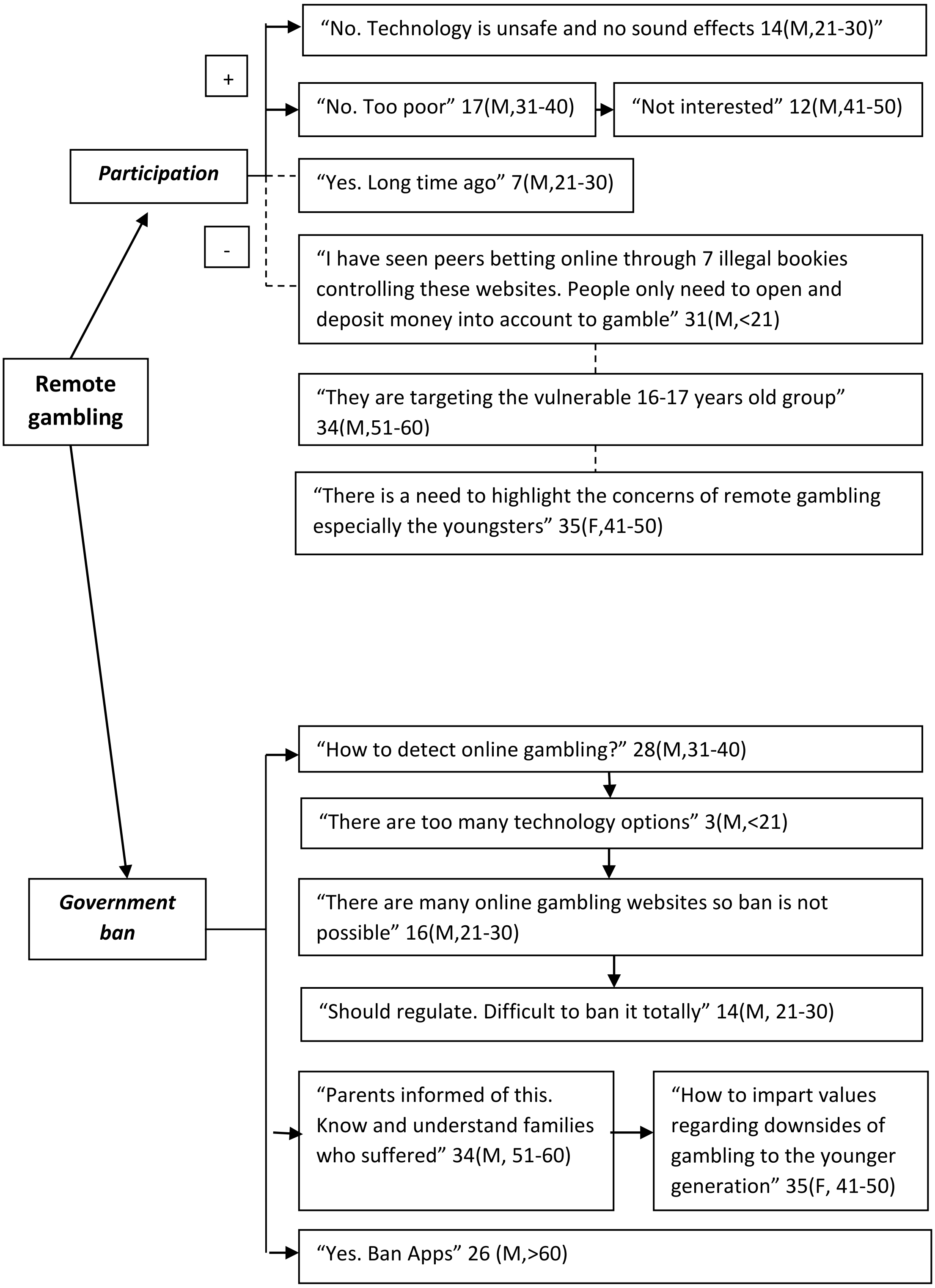


Fig.22–Mapping on participating in remote gambling and government ban on remote gambling

5.6 Chapter Summary

The study findings can be categorized into four main areas; firstly, the appeal of Singapore as a tourism destination, both current and in the future 2025; secondly, the effectiveness of promoting casino tourism and IRs as a tourism strategy of Singapore, thirdly, the impact of the IRs on community, and fourthly, the safeguard measures to minimize social costs of casino gambling in Singapore. Six participants of a mix of different demographic characteristics such as; age group (<21, 21-30, 41-50), religion (Taoist, Protestant, Muslim), ethnic group (Chinese and Malays) and education level (university graduates and non-graduates) were selected to review the key positive and negative social representations of IR as Singapore's casino tourism strategy. Refer to Appendices 5-3-1 on mapping for the six individual participants (6, 7, 9, 10, 12 and 34).

Social Exchange theory (SET) suggests that local residents would be supportive of tourism initiatives if they perceived that benefits outweigh costs (Chhabra and Gursoy, 2007). The SET tends to adopt a macro-view approach but to have in-depth understanding on local residents' views, Social Representations theory (SRT) is more useful as it focuses on the micro-perspectives of local residents' perception of tourism initiative (Moscovici, 1963, 1973; Pearce, 2009; Pearce and Wu, 2012). SRT is relevant as it considers what the local residents think and behave towards tourism initiatives, and this could impact the development and growth of the IRs. Chhabra and Gursoy (2007) advocate the Gambling Tourism Support Model (GTSM) by focusing on the local residents' demographic characteristics – race and educational background.

The positive social representation of the IR/casino tourism strategy includes the following: IR is an appealing tourism product to both local residents and tourists (example of participant 6), particularly the Mainland Chinese tourists who are able to communicate in the Chinese language when they visit Singapore (example of participant 7). This is evidenced by higher tourist arrivals in Singapore as visitors perceived RWS as a fun place for families and friends; the IRs are also attracting more business travellers from the MICE segment (example of participant 9); the IRs help to boost the tourism industry and their high-end retail outlets are inspiring local residents (example of participant 10); and the IR is attractive as it offers total experience for tourists including gambling tourists, and this can boost Singapore's economy with higher taxation revenue and a vibrant city (example of participants 12 and 34). Overall, these multi-faceted shared social representations that IRs including casinos are good for Singapore. The findings are consistent with the academic literature suggesting that a governments' actions when promoting casino tourism strategy are driven by achieving economic benefits such as taxation revenue and improving the social well-being of residents (Raento 2000; MacLaurin and MacLaurin, 2003; Vong, 2003).

The negative social representations of the IR strategy were shared by two participants who were concerned with the social costs associated with casino gambling and felt that the current levy measure was ineffective to deter addicts, as these people believe that they can win money by patronizing casinos, and they can also gamble at the 4-Digit (4D) gambling outlets (example of participant 6). While the number of respondents offering this more negative view is small, it is enough to suggest that there is a polemical social representation at work when IRs and casinos are discussed in Singapore. The critical question for future research to assess is if this polemical representation will give ground and grow, or simply persist as the inevitable diversity of views held when large development projects take place. Participant 7 was concerned that addictive gambling can result in higher crime rates and political instability, and suggested increasing the daily entry levy to $500 to deter locals from patronizing the casinos. Thus addictive gamblers would suffer in their quality of life. This finding is consistent with the social implications due to casino gambling at Atlantic City (Grey, 1995), Colorado (Stitt, 2001), and New Zealand (Lin et al., 2010).

Chapter 6

Summary and Conclusion

Chapter Outline

In this concluding chapter, a synthesis of the preceding studies is undertaken and these results are related to the conceptual model developed in Chapter 2. The literature review included the key issues of destination competitiveness, destination branding, destination choice and impacts of casino gambling on local communities. In the case of Singapore, a destination with limited resources, it is vital that the government and STB should consult and work with stakeholders (destination management) in promoting the two IRs which should enhance the destination branding image and personality attributes of the city-state that matches the perceptions of consumers, and also to understand the selection of a destination by consumers. This will enable Singapore to achieve destination competitiveness and social-economic prosperity successfully. In addition, the chapter reviews how the three inter-related studies answer the three research questions set forth for this thesis. The researcher evaluates if the two IRs have provided a sustainable competitive advantage to Singapore as a tourism destination by analysing the perceptions of stakeholders, tourists, and local residents. Further, some implications generated by the research are considered.

6.1 Conceptual model for Singapore's Destination Competitiveness – A review

In Chapter 2, it was revealed from the work of the UNWTO and tourism scholars that a successful tourism product should be measured in terms of social and qualitative indicators (improved quality and standard of life of residents) which are as important as quantitative economic indicators (higher tourism performance, more jobs created and a superior economy). Ritchie and Crouch's (2003) Destination Competitive framework, and Dwyer and Kim's (2003) Integrated model of Destination Competitiveness identified that a tourism destination needs to have good management of its core resources and supporting factors to be able to develop a highly competitive and sustainable tourism industry in locations such as Singapore, a destination with limited natural resources. The National Tourism Organization is crucial in destination management and working and coordinating with the industry stakeholders to deliver a superior tourism product experience for tourists. The academic literature also highlighted the importance of including local residents as a key stakeholder as their economic prosperity and overall well-being are key aims when measuring destination competitiveness. Refer to Figure 29 for details

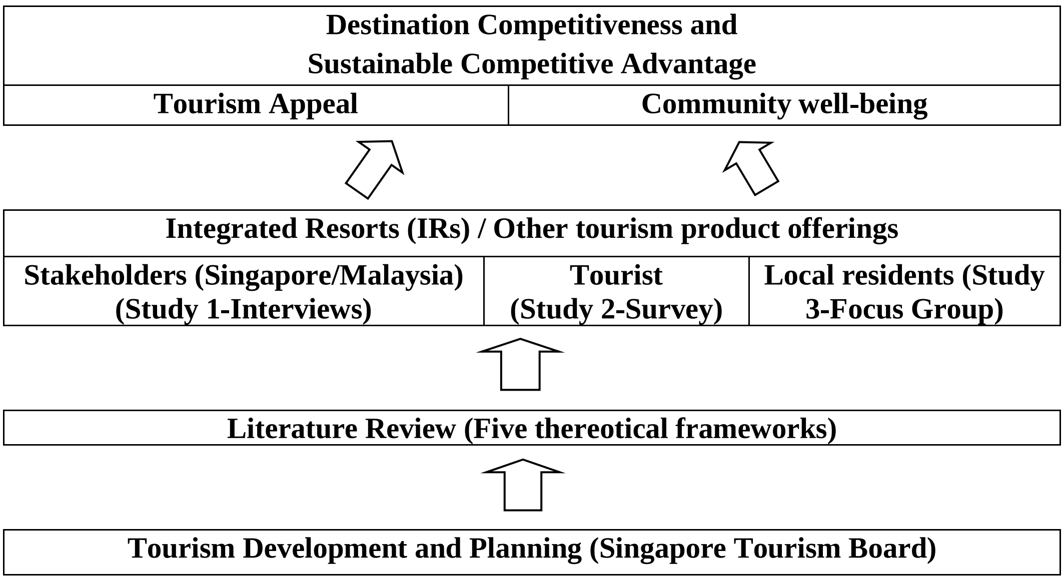


Fig. 29 – Singapore's new destination competitiveness model

There were three research questions identified from the organizing conceptual model (Figure 29) and these research questions were explored in the three studies comprising the thesis. In summary, the research questions were:

Research Question 1: Are the IRs perceived positively by the stakeholders – tourism partners? If this is the case, they will support the IRs.

Research Question 2: Are the IRs consistent with and do they contribute to and enhance Singapore's destination brand image?

Research Question 3: Are the IRs perceived to be also benefiting the local community, i.e. do economic contributions outweigh social costs?

As mentioned in Chapter 2, these reseach questions were addressed in Study 1 (Research question 1), Study 2 (Research question 2), and Study 3 (Research question 3). This chapter links the answers from the three research questions to the conceptual model of Singapore's Destination Competitiveness.

6.2 Research Questions: A Synthesis and Re-exploration

Study 1

6.2.1 Perceptions and views of Stakeholders relating to the two IRs

In Study 1 (Chapter 3), the aim was to understand the stakeholders' perceptions of the two IRs and the tourism sector in Singapore. Some respondents perceived Singapore as an attractive tourism destination due to its strategic location making it a convenient hub for travelling to the East and West. The efficient government also ensured visitors' safety when they visited the city-state. Overall, stakeholders were pleased that the two IRs have become the iconic tourism attractions in Singapore as they offer tourists a unique tourism experience of accommodation, food, and entertainment including casinos within the premises. The two unique IRs were perceived to have boosted Singapore's tourism sector as RWS, in particular, with its Universal Studios attracted leisure tourists, and MBS's excellent convention facilities attracted MICE tourists. They also suggested that STB should not rely solely on the two IRs as the city-state has other appealing tourism attractions including the Gardens by the Bay, River Safari and Grand Prix F1as resources in marketing destination Singapore. These facilities also helped to distinguish brand Singapore from other tourism destinations.

On the other hand, the data indicated that respondents felt an overemphasis on promoting casino tourism strategy could lead to two potential problems; firstly, it could change tourists' perception of the destination image negatively as Singapore could become another gaming destination like Macau, and secondly, addictive gambling in the casinos can lead to high social costs such as high crime rates, broken families and divorces which were evident in the United States. The stakeholders firmly believed that Singapore has more to offer as a destination than just expanding its casinos. The industry stakeholders urged the government to consider consulting and working with key stakeholders including local residents in the planning and implementation of future tourism development including the third or fourth IRs.

6.2.2 Perception of the IRs in enhancing the brand image of Singapore as a destination

The stakeholders perceived that the STB has striven to boost the tourism sector by promoting Singapore as a food, shopping, and multi-cultural destination. An earlier study by Tak and Wan (2003) found that tourists from North Asia viewed Singapore as a food/shopping paradise and tourists from Oceania tend to regard the cultural heritage of Singapore as appealing. However, respondents in the current study were not supportive of the action the STB had taken to rebrand Singapore twice, 'Uniquely Singapore' (2004) and 'YourSingapore (2010) in an attempt to increase tourism traffic, as they preferred that STB adopt a more consistent branding slogan like its competitors - 'Truly Asia' (Malaysia), 'Incredible India', or 'Amazing Thailand'. They asserted that industry partners and tourists would become confused with frequent changes to the marketing slogan as these would show that Singapore lacked a consistent 'brand identity'. This would make it harder for STB to foster emotional bonds between brand Singapore and tourists. They also suggested that STB should focus on promoting Singapore in terms of its unique brand attributes – safety, cleanliness, good infrastructure, food, and culture. By way of analogy, Morgan et al. (2003) observed that New Zealand launched a successful 100% NZ brand campaign as it was clear and consistent, promoted quality and was unique. Murphy et al. (2007) added that a good destination branding campaign of this type can attract visitors and create competitive advantage through establishing an emotional relationship between tourists and destination.

The stakeholders shared mixed views on whether the IRs matched the destination image of Singapore. The positive views were that the IRs made Singapore appear as a vibrant, unique and total tourism experience for visitors. On the other hand, they were also concerned that Singapore attracted gambling tourists and this could lead to the city-state being perceived negatively as a gaming destination like Macau. Attracting the majority of tourists from the leisure tourist segment was seen as more important than pursuing gambling tourists.

The stakeholders acknowledged however that the IRs were a successful tourism initiative and enhanced brand Singapore. Arguably, it is this success which has made other competitive destinations such as Vietnam and the Philippines seek to duplicate the IR model. The question here is if others also adopt the same IR strategy, would the tourists continue to visit Singapore? In short, the IR strategy can be seen as a viable short-term branding strategy and Singapore should incorporate IRs as part of the total tourism product of the city-state in order to become an attractive tourism destination.

6.2.3 Stakeholders' Involvement in the planning and implementation of the IRs

The stakeholders were disappointed that they were not involved or consulted by the government and STB when the decision to launch the two IRs was made. Though there were dialogue sessions with trade partners and potential casino players, the industry stakeholders felt neglected as their joint participation could improve the success of the two IRs. They believe that to achieve sustainable tourism success, the government and STB should consult the industry partners and local residents to offer a total tourism experience for visitors and benefit the local community. They also suggested that if Singapore plans to launch another new IR, they hope that all parties could participate in the planning and implementation of the new tourism project. Freeman (1984) emphasized that DMOs should involve and collaborate with stakeholders in developing tourism projects. These same ideas about the desirability of collaboration are built into the tourism destination planning models of Ritchie and Crouch (2003) and Dwyer and Kim (2003). It also appears, however, that only a few instances of full collaboration exist. Nevertheless, a study by Bryd et al. (2009) revealed that effective communication between DMO and stakeholders including residents, entrepreneurs, tourists and government did in fact boost a major successful tourism project in North Carolina.

6.2.4 Stakeholders long term view of Singapore as a tourism destination

Tourism destinations are subjected to influences by external forces such as political stability and economic prosperity. According to the stakeholders, Singapore should be able to achieve the target of 17 million visitors by 2015 provided U.S. and Europe continued to enjoy economic growth and political stability as many business travellers visited Singapore for commercial activities.

The stakeholders believed that the Singapore government would be very cautious in issuing new licenses to casino operators since as much as this could bring in more tourists, it could trigger more social problems. It would be a trade-off as new competition would spur the current two IRs to be more innovative in tourism offerings, however, it could lead to more social implications and social costs to the local community. Studies have shown that the total social costs can be significant. Cheng (2011, cited in Zabielskis, 2015) highlighted the total social cost of gambling would include efforts at preventing and treating problem gamblers, dealing with gambling related criminal behaviour, and the legal costs of police and courts. Fong, Fong and Li (2011) conducted a recent study in Macau and identified seven indexes of social costs and related social impacts: treatment costs, prevention costs, family/friends physical and psychological costs, legal costs, rent-seeking costs, regulatory expenses, and the public costs of training, promotion and research. The total social costs of gambling in Macau rose from US$40 million to US$106 million from 2003 to 2007, an increase of 163 per cent which was attributed to the liberalization of casino gambling.

<u>Study 2</u>

6.2.5 Perception of Singapore as a tourism destination

The respondents rated Singapore as an appealing tourism destination and the top five destination attributes included safety and security, a place to recommend to family/friends/associates, a clean and litter free environment, opportunities for shopping, and a wide variety of products for shoppers. They also viewed Singapore as less appealing as a gaming destination with lower ratings being given to such features as complimentary casino services and higher roller clubs. Studies by Moufakkir et al. (2004) and Kneesel et al. (2009) indicated that it is useful for marketers to identify the brand identities perceived by consumers and match the perception of destination image to boost visitation. In considering this desirable matching, a pathway for promoting Singapore may be less about the gaming options and more about the other IR features and the winning attributes of safety and modernity.

6.2.6 Perception of the brand personality of Singapore compared with other tourism destinations

The Multi-Dimensional Scaling (MDS) and Perceptual analysis in Study 2 (Chapter 4) compared Singapore against nine other competing tourism destinations both structurally and perceptually. This destination benchmarking approach was valuable in the sense that benchmarking can be insightful in improving the performance of tourism destinations (Kozak, 2004).

This MDS mapping exercise revealed that the three leading competitive tourism destinations were Tokyo, Taipei, and Sydney. It also indicated that Singapore is perceived as a mix of East and West from the three dimensional analysis. For example, in Dimension 1, Singapore lies in between Manila rated highest in affordability versus "expensive" Tokyo. In Dimension 2, Singapore is in between Melbourne rated highest in discovery versus Taipei. This was also the case in Dimension 3 where Singapore lies in between Bali rated highest on exotic versus Melbourne. The respondents perceived brand Singapore favourably in terms of being modern, cosmopolitan, and cultural. The brand descriptors, scenic, spectacular, and spirited were rated as less likely to be associated with Singapore.

6.2.7 Perception of the future landscape of Singapore's tourism development in 2025

The study revealed that more than 57% of respondents rated the future tourism landscape of Singapore as a city- with sustainable urban living as most appealing and likely to attract them to visit the city-state. At least 50% of respondents suggested that they are most likely to extend their stay when they visit Singapore. The respondents rated the 'Medical and Wellness tourism' landscape as least appealing. This finding is relevant to destination marketers seeking to focus on positioning Singapore as a sustainable cosmopolitan city to ensure the brand personality of Singapore matches the brand image perceived by visitors to increase visitation intention.

<u>Study 3</u>

6.2.8 Perception of the appeal of Singapore as a tourism destination

Regarding the appeal of Singapore as a tourism destination, the study revealed that the IRs, tourism attractions, and its function as a tourism hub were the three key reasons that attracted tourists to Singapore. This is attributed to the government's role in promoting the two IRs aggressively to attract foreign visitors to Singapore. This approach was also adopted by governments from the United States (Raento, 2000), Canada (MacLaurin and MacLaurin, 2003), and Macau (Vong and McCartney, 2005). In all these settings, the casino tourism strategy increased revenue and boosted the economies.

Participants (local residents) in this third study has some different perspectives on the tourism landscape of Singapore in 2025 compared with the tourists' survey in Study 2. Seven participants preferred STB to be promoting Singapore as a Tropical Vibrant city rather than a Family Oriented Wonderland. By way of contrast, the tourists viewed the Garden city and Family Oriented Wonderland as most appealing tourism scenarios and the Medical Tourism and Wellness scenario as least appealing. The work reveals that the representations of tourism destinations can be quite different according to the social roles and positions of respondents with tourists not necessarily seeing the destination in the same way as those involved in the industry.

6.2.9 Effectiveness in promoting casino tourism

The local residents generally perceived the IRs as a strong pull factor in the tourism sector as they offered retail shopping, and entertainment, both in the casinos and notably in the Universal Studios component. They also shared their views and stories related to the impact of IRs on social capital and the community, and offered suggestions to improve measures to minimize the social evils associated with casinos. Participants did agree that the IRs were an effective tourism strategy with more tourist arrivals including business travellers and accompanying higher occupancy rate at the IR hotels.

6.2.10 Impact of the casinos within the IRs on the community

The participants (local residents) shared personal stories of negative impact of the two casinos on the community. For example, one young female participant perceived casinos negatively due to addictive gambling problems. She shared a deeply personal experience of her grandmother, an addictive gambler who patronized the IR casinos regularly despite the entry levy of $100. Eventually the grandmother lost her house but her family helped her overcome her financial problems and her quality of life, while jeopardised for a while, was maintained. Nevertheless, the threat of social costs to members of the community was highlighted in the story. A young male asserted that bankruptcy and broken families were associated with casino gambling. It is clear from these specific examples that while the Singapore government has implemented effective measures to control the social costs, some anxiety about this issue persists in the minds of local people.

6.2.11 Safeguard measures to minimize social costs of casino gambling to Singapore

The tourism literature has emphasized the importance of the government's control over the gaming industry. The government appears to recognize the potential issues and social costs associated with casino gambling and has set up the Council on Problem Gambling (NPCG) and introduced the casino exclusion policy and entry levy to deter local residents from patronizing the casinos. However, some participants argued that the current safeguard measures are not effective and stricter measures should be implemented.

6.3 Key Contributions of the Thesis

As mentioned previously in Section 2.9, this thesis contributes to the academic literature on evaluating IRs incorporating casino developments in Asia. Singapore has launched a successful IR tourism strategy and there are developments in the casino industry as the numbers and capacities of casinos have grown rapidly in the Asia-Pacific region. The discussion notes that Australia, New Zealand, South Korea, Cambodia, Myanmar, Philippines, and Macau are competitors in this field. The IR with subsidiary casino tourism strategy has warranted more attention especially in the context of the Singapore IR model triggering more IRs in the Asia-Pacific region. This thesis studied the IRs in detail and this is a special contribution because the Singapore IR model is an all-inclusive concept. It combines accommodation, food, entertainment, and casinos whereas other resorts or hotels worldwide do not include casinos in their IR concept. Regional destinations have recognized the significant contribution of the two IRs as numbers of tourists to Singapore have risen. The IR is a novelty tourism product and it is easy to envisage more mega-size IRs built by rival destinations. These competitive and contemporary issues produced the stimulus for the stakeholder oriented evaluation of Singapore's IRs in this thesis.

The key highlights of the three research studies are as follows:

In Study 1, theoretical frameworks such as destination competitiveness and stakeholder theory were found to be relevant to the stakeholders' perceptions of the IRs. However, the findings revealed that there was minimal stakeholders' involvement in the planning and implementation of the two existing IRs, as these were developed purely through collaboration between the government, allied government agencies and casino operators. Here, the academic literature suggests that to establish long-term sustainable success in tourism initiatives such as the IRs, there should be tripartite collaboration between the government, STB and industry stakeholders, including the community. The stakeholders contacted in this study supported the need for future collaboration. There is though, an implication from the study that the academic literature and its support for collaboration is at odds with the success of the Singapore IRs, since the latter did not involve high levels of cooperation.

For Study 2, the concepts of destination branding, destination image and destination choice were useful in relation to the survey. The tourists' survey revealed that the launch of the two IRs was consistent with the destination image of Singapore and in fact, has enhanced the view of Singapore as a more vibrant tourism destination. The results supported the research view that consumers can differentiate destinations based on brand personality (Morgan et al., 2003; Murphy et al., 2007). Singapore is perceived as a mix of East and West, and there could be more exploration on how the city-state can strengthen this uniqueness and make Singapore more appealing to visitors.

In Study 3, the concepts of social exchange, social representations and social capital were used to build an in-depth understanding of local residents' perceptions as their views will affect their behaviour towards the two IRs. This has an implication for the development and growth of the IRs in Singapore. The current study found that the positive social representations of the IR with casino tourism strategy include: the IR is an appealing tourism product and attracts tourist arrivals from the leisure, business and gaming segments. The participants like the IRs as they agree that they offer a total tourism experience for visitors, and that the higher volume of tourists boosts taxation revenue and makes Singapore a more vibrant city. These findings are consistent with earlier studies justifying why governments prefer to adopt an integrated resort tourism strategy to boost the tourism industry and the overall economy. The participants also indicated that Singapore should promote different tourism landscapes to cater to all segments of visitors.

The study also revealed some negative components of the social representations of the IRs, as the participants expressed their concern about the social implications associated with casino gambling such as, political instability and higher crime rates. They also offered the view that the levy to deter local residents from patronizing the casinos was ineffective. They perceived that problems associated with addictive gambling could affect their quality of life. For the Singapore variant of the IRs to be a successful tourism product, it is arguably important to gain even more favourable perceptions and further support of the local communities.

6.4 Limitations of the Thesis

This thesis used a combination of both qualitative and quantitative methods to obtain data and reach its conclusions. As usual, there are inherent strengths and weaknesses associated with different methods.

Firstly, the qualitative interview in Study 1 (Chapter Three) used 40 stakeholders from the public sector and private sectors in Singapore and Malaysia. The work was comprehensive and aligned to the general definition of stakeholders in the existing literature. The investigator noted a common phenomenon that the five participants from the government sector tended to be more conservative, diplomatic and prudent when expressing their views and sometimes did not answer all the questions. This is understandable as they were cautious in giving too much detailed information that might be politically sensitive. This sensitivity limited the quantity and quality of the information gathered. Thankfully, there were 35 participants from the non-government stakeholder groups who tended to be more vocal and expressive. For example, only one participant from the non-government stakeholder group declined the voice-recording. Attempts to reach representatives from DMOs were unsuccessful.

Second, the survey approach employed in Study 2 (Chapter Four) adopted a convenience sampling method, and the investigator was not able to access high-rollers and gambling tourists because the two casinos deter anyone attempting to approach their casinos on-site for interviews and surveys. It was not possible to distribute surveys within or near the casinos. The online response rate could be better as there was no incentive to undertake the survey since it was not possible to thank respondents for their efforts in this way. As in Study 1, some of these sampling limitations need to be considered in interpreting the findings. The issue of how tourists make the choice of destination could be probed further in the survey questionnaire.

Third, the focus group interview in Study 3 (Chapter Five) consisted of 35 local residents (27 Chinese and 8 Muslims) as the investigator was not able to invite participants from the Indian or Eurasian ethnic groups. During the focus group sessions, the participants also did not highlight if they benefited personally from the launch of the two IRs.

Fourth, the relationship between destination competitiveness and socio-economic prosperity could be further explored and discuss.

6.5 Areas for Future Study

The topic of IRs is a new area of research and could be explored in more depth in future investigations. As a continuation of this thesis, researchers could compare the different IRs in the Asia Pacific region with a special focus on the importance in the destination branding and image, and the tourist experience. This would be an interesting topic because distinguishing the various IRs could provide useful insights about destination choice for this type of experience. Some of the possible areas to consider for future studies link directly to extending the three studies conducted in this thesis:

6.5.1 Perceptions of stakeholders of the IRs in 2020 (cf. Study 1)

It will be of relevance to the academic literature to conduct a study of stakeholders in Singapore and Malaysia in 2020, as by then there should be more IRs in the Asia Pacific region. It will be interesting to compare the findings of a study in 2020 versus Study 1 in the present research. Have the Singapore government and the STB adopted a more collaborative approach in working with stakeholders when developing a new tourism project? This research could be insightful as earlier findings suggest that stakeholders' involvement is a key factor to the success of tourism development projects.

6.5.2 Comparing the perceptions of stakeholders in Las Vegas, Macau versus Singapore (cf. Study 1)

Currently three prominent gaming destinations globally are Las Vegas, Macau and Singapore. A contribution to the academic literature would be to investigate if the various stakeholders in these three destinations have the same perceptions in terms of destination competitiveness, destination branding, and future developments in the tourism industry. This work could determine if earlier studies on the importance of stakeholders' involvement have correctly identified the determinants of the sustainable success of these three gaming destinations. The Las Vegas Strip and Macau have many more casinos than Singapore. Do the stakeholders in Las Vegas and Macau consider that having more casinos is a better tourism strategy, or is it possible that by adopting a more diversified approach with only two casinos the success of the destination is more balanced and sustainable?

6.5.3 Perceptions of stakeholders in destinations with IRs (cf. Study 1)

It will be useful to investigate if the regional destinations such as Korea, Japan, Taiwan, Vietnam, Macau, and Australia launch or are about to build mega IRs in an attempt to outrival the Singapore IRs. Do the DMOs in these specific destinations consult and collaborate with the respective stakeholders in promoting IRs? This will reveal if Singapore is the only destination that has limited stakeholders' involvement in the development of new tourism initiatives. Or have other regional governments adopted a similar approach of preferring to work with other government agencies rather than the private sectors and the community?

6.5.4 Survey on tourists to Singapore in 2020 (cf. Study 2)

It will be interesting to study tourists to Singapore in future years to explore their perceptions of the IRs and determine if these developments are still an appealing tourism product that motivates them to visit Singapore. Or are there other tourism features of Singapore that attract them to visit the city-state. The current study indicated that the IRs have enhanced the appeal of Singapore but will it be the same in 2020? Will the destination brand image of Singapore change as the novelty IR concept is duplicated by regional competitors? If there is a decline in tourist arrivals from this competition, what should Singapore do to attract new tourists and encourage repeat visits? Are there any unique features that the tourists can identify with and which will continue to prompt tourists to visit the Singapore IRs? Do the tourists perceive the Singapore IRs differently from other destinations? If yes, how are these differences manifest and how can Singapore can consolidate its uniqueness in the two IRs? Or will it be necessary to revive any decline in tourism statistics by introducing a new IR to better compete in the region?

6.5.5 Survey on high-rollers and gambling tourists (cf. Study 2)

New surveys about tourists could focus on high-rollers and gambling tourists to find out their perceptions and attitudes towards the two IRs. It will be useful to identify how they perceive the Singapore IRs versus other IRs in the regions. What attracts these gambling tourists to patronize the casinos in Singapore? Do the Singapore casinos have unique appeal or is novelty the key driver for their visits? If this is the case, when other regional destinations launch mega IRs with casinos, will they prefer to patronize these newer casinos instead?

6.5.6 Impact of the IRs on Local residents of Indian and Eurasian ethnic groups (cf. Study 3)

As Singapore is a multicultural society, further focus groups could be conducted involving Indian and Eurasian ethnic groups as their views and social representations are equally important to the local community. Such studies could contribute to the academic literature by comparing the social representations of different ethnic groups, and how they perceive and behave towards new tourism initiatives. If funding is available, there should be more focus groups conducted to include larger number of respondents from all of Singapore's ethnic groups to see if there are differences using large numbers of respondents.

6.6 Final Comments

The two IRs have become the new iconic tourism attractions of Singapore for tourists. It is expected that regional destinations will soon duplicate this successful IR model and compete in the lucrative casino tourism markets. From the perspectives of the tourists and local residents, the IRs are attractive tourist attractions. The findings suggested that Singapore should continue to launch innovative product offerings to appeal to new and repeat visitors but these new efforts should not necessarily stress on the gaming components of the IRs.

The Singapore government has undertaken a prudent approach in striving to boost the tourism sector through more visitors. At the same time, it has introduced safeguards and other measures to deter those lower income residents from patronizing the casino segment of the IRs attractions. The government is monitoring if the safeguard measures are effective or if there is a need to modify or introduce stricter measures to minimize social impact in Singapore. The research results revealed that there are concerns about the social evils of casino gambling, and that the government should seriously reconsider if there is a need to accommodate new casino operators. In an attempt to achieve destination competitiveness, Singapore should balance the drive to attract visitors with the casino tourism strategy and ensure the social well-being of the local residents.

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Appendix 3-0

Questionnaire sent to stakeholders for Study 1

Section A) Perceptions of IRs and its success

1. What do you think attracts international tourists to Singapore?
2. Do you think that the IRs have benefited Singapore overall?
3. What features do you like or dislike about the IRs?
4. Do you think that the IRs have contributed to Singapore's 2015 goal to be an attractive tourist destination?
5. Do you think that the IRs is a successful tourism initiative by STB?

Section B) Singapore's new branding image as a destination

6. What do you think is STB's vision in promoting brand Singapore as a tourist destination?
7. What do you think is/are the unique attribute(s) of the Singapore's brand?
8. Do you think that the IRs matched Singapore's current image as a destination?
9. What do you think of the IRs impact on Singapore's branding strategy relative to competitors?
10. Can the IRs contribute to enhancing Singapore's branding image in the perception of tourists?

Section C) Involvement in IRs development decision making process

11. Have you been involved in the planning and implementation of the IRs?
12. What do you think the stakeholders can contribute to the planning and development of the IRs?
13. How can more stakeholders be involved in the planning and implementation of the IRs?
14. What type of collaboration between the government, STB and tourism partners is necessary in boosting the development of the IRs in Singapore?
15. What are some challenge(s) that you see in creating such collaboration?

Section D) Long term view of Singapore as a tourist destination

16. Do you think that Singapore will be able to attract the targeted 17 million visitors by 2015?
17. How do you think the two IRs will perform after 2016, i.e. 10 years of casino license exclusiveness?
18. In general, do you think that the IRs are crucial to Singapore's tourism industry?
19. Do you feel the IRs can provide sustainable competitive advantage for Singapore as a tourism destination?
20. If the IRs are successful, do you think the Singapore government should grant more casino licenses and build more IRs after 2016?

Appendix 3-1

Findings from Study 1-Using Leximancer

Section A – Perceptions of Integrated Resorts and its success

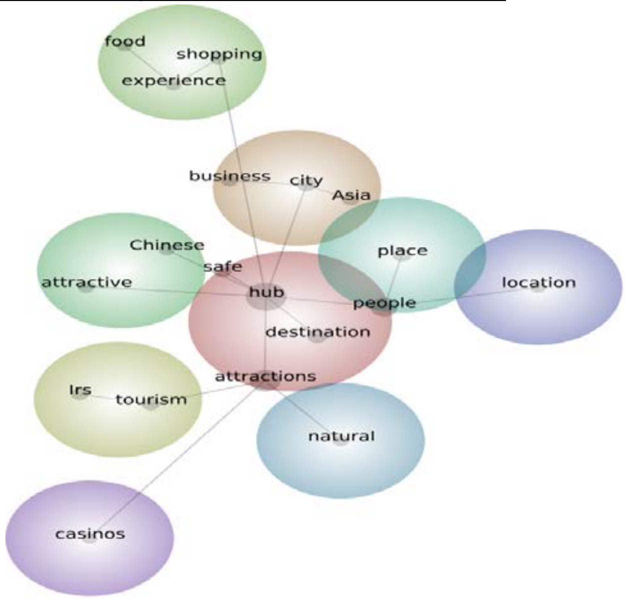


Figure: 3-1 – Factors that attract international tourists to Singapore

Appendix 3-1A

Overall			IRs			Asia			Chinese		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Hub	99	100%	Attractive	2	20%	Destination	2	13%	Attractive	2	20%
Attractions	58	59%	Safe	2	17%	Natural	1	11%	Food	1	10%
People	40	40%	Tourism	2	14%	Food	1	10%	Business	1	9%
Destination	15	15%	Natural	1	11%	People	4	10%	Safe	1	8%
Place	15	15%	Attractions	5	9%	Attractive	1	10%	Tourism	1	7%
City	14	14%	Casinos	1	8%	Business	1	9%	Destination	1	7%
Tourism	14	14%	People	3	8%	City	1	7%	Hub	5	5%
Shopping	14	14%	Shopping	1	7%	Shopping	1	7%	Attractions	2	3%
Safe	12	12%	Destination	1	7%	Place	1	7%	People	1	2%
Casinos	12	12%	Hub	6	6%	Hub	5	5%			
Business	11	11%				Attractions	2	3%			
Attractive	10	10%									
Location	10	10%									
Food	10	10%									
Natural	9	9%									
Experience	7	7%									

Table 3-1A: Related concepts for Singapore and IRs

Appendix 3-2

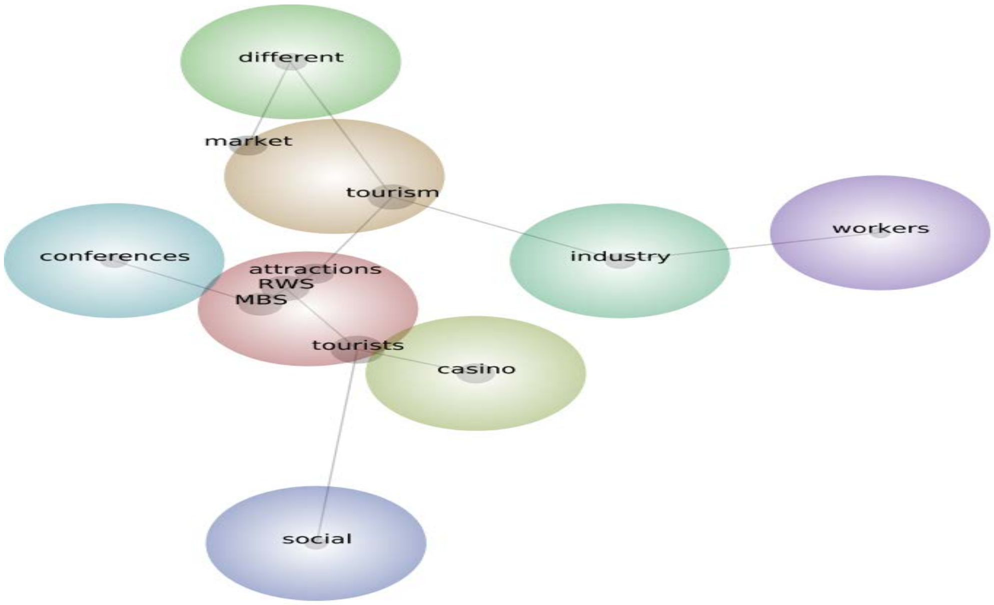


Figure 3-2 – Benefits of the IRs to Singapore

Appendix 3-2A

Overall			MBS			RWS		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Casino	20	100%	Attractions	2	22%	Attractions	2	22%
Tourists	17	85%	Conferences	1	12%	Conferences	1	12%
Tourism	15	75%	Tourism	1	7%	Tourists	2	12%
Different	12	60%	Tourists	1	6%	Market	1	10%
Market	10	50%	Casino	1	5%	Tourism	1	7%
Attractions	9	45%				Casino	1	5%
Industry	8	40%						
Conferences	8	40%						
Social	8	40%						
Workers	6	30%						

Table 1-2A: Benefits of the IRs to Singapore

Appendix 3-3

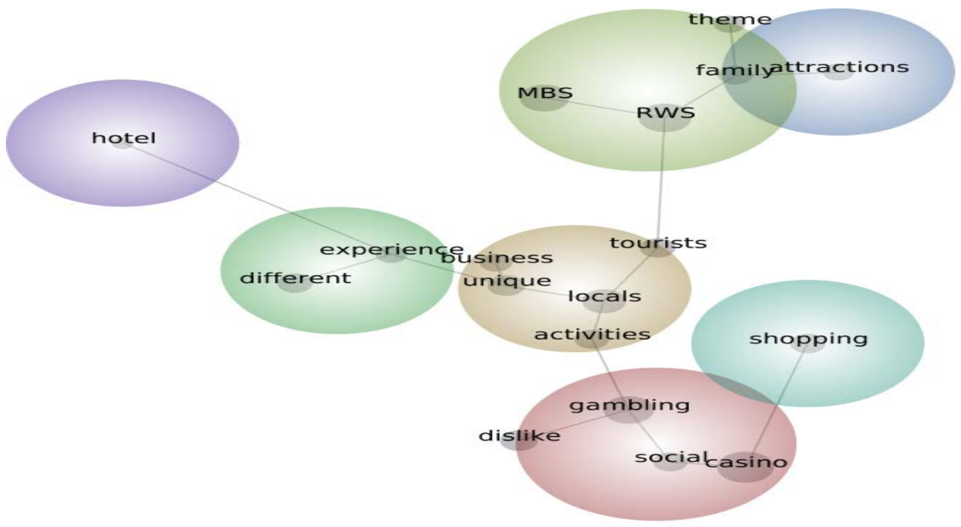


Figure 3-3 – Like and Dislike features about the IRs

Appendix 3-3A

Overall			**MBS**			**RWS**		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Casino	39	100%	Family	3	25%	Theme	4	40%
Gambling	30	77%	Business	2	22%	Family	4	33%
Dislike	20	51%	Locals	2	18%	Locals	3	27%
Different	19	49%	Unique	1	17%	Attractions	3	21%
Shopping	18	46%	Shopping	3	17%	Unique	1	17%
Tourists	15	38%	Dislike	3	15%	Experience	1	14%
Attractions	14	36%	Experience	1	14%	Tourists	2	13%
Family	12	31%	Activities	1	12%	Shopping	2	11%
Locals	11	28%	Hotel	1	11%	Business	1	11%
Social	11	28%	Theme	1	10%	Social	1	9%
Theme	10	26%	Attractions	1	7%	Different	1	5%
Business	9	23%	Tourists	1	7%	Casino	2	5%
Hotel	9	23%	Different	1	5%			
Activities	8	21%	Gambling	1	3%			
Experience	7	18%						
Unique	6	15%						

Table 1-3A: Like and Dislike of the IRs

Appendix 3-4

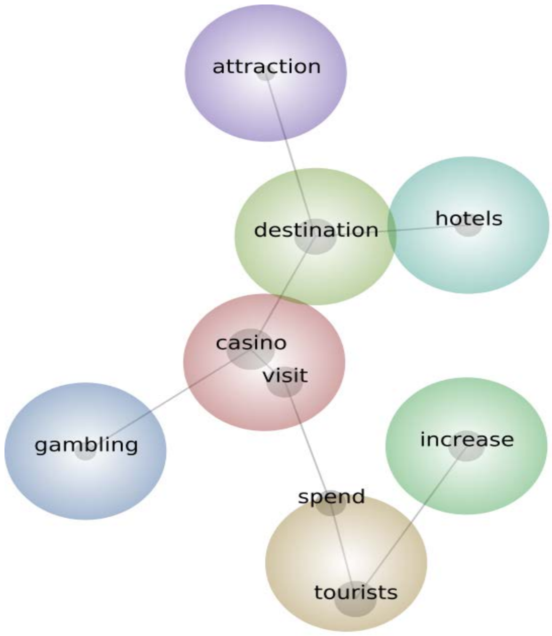


Figure 3-4 -IR contribution to Singapore's 2015 goal

Appendix 3-4A

Overall		
Related	Count	Likelihood
Tourists	24	100%
Casino	13	54%
Increase	11	46%
Attraction	11	46%
Destination	10	42%
Hotels	7	29%
Visit	6	25%
Spend	6	25%
Gambling	5	21%

Table 3-4A: IR contribution to Singapore's 2015 goal

Appendix 3-5

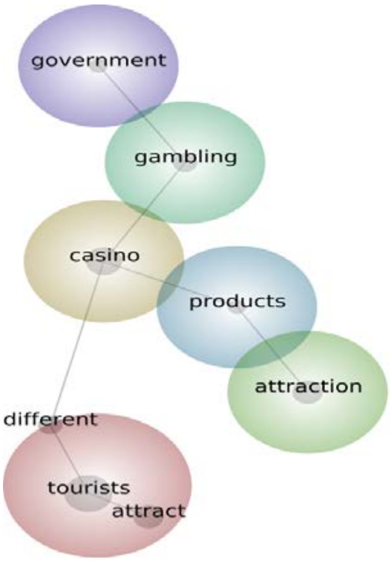


Figure 3-5 - IR is a successful tourism initiative

Appendix 3-5A

Overall		
Related	Count	Likelihood
Tourists	16	100%
Attraction	15	94%
Government	9	56%
Casino	7	44%
Attract	6	38%
Gambling	6	38%
Different	4	25%
Products	3	19%

Table 3-5: IR is a success tourism initiative

Section B - Singapore's new branding image as a destination

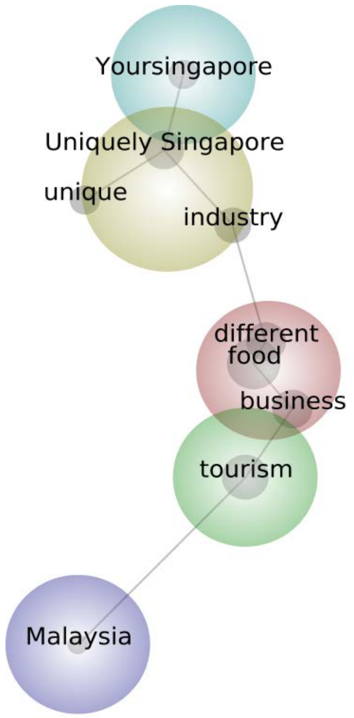


Figure 1-6: STB's vision in promoting brand Singapore as a tourist destination

Appendix 3-6

Overall			Malaysia			YourSingapore			Uniquely Singapore		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Tourism	18	100%	Tourism	2	11%	Industry	2	33%	Industry	2	33%
Food	11	61%	Unique	1	11%	Unique	1	11%	Unique	3	33%
Unique	9	50%				Tourism	1	6%	Different	1	20%
Business	8	44%							Food	1	9%
Industry	6	33%									
Different	5	28%									

Table 3-6: STB's vision in promoting brand Singapore as a tourist destination

Appendix 3-7

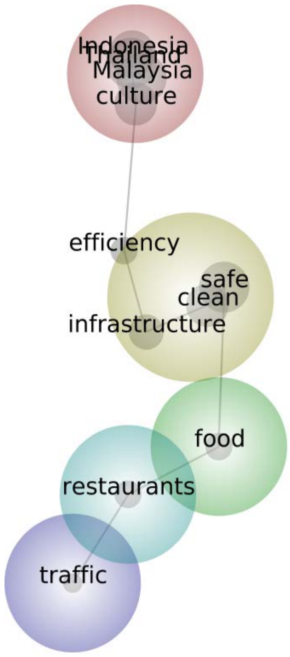


Figure 3-7: Unique attributes of Singapore's Brand

Appendix 3-7A

Overall			Thailand			Indonesia			Malaysia		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Safe	26	100%	Culture	3	27%	Culture	1	9%	Culture	1	9%
Food	15	58%							Safe	1	4%
Culture	11	42%									
Clean	8	31%									
Infrastructure	7	27%									
Restaurants	6	23%									
Efficiency	5	19%									
Traffic	4	15%									

Table 3-7A: Unique attributes of Singapore's brand

Appendix 3-8

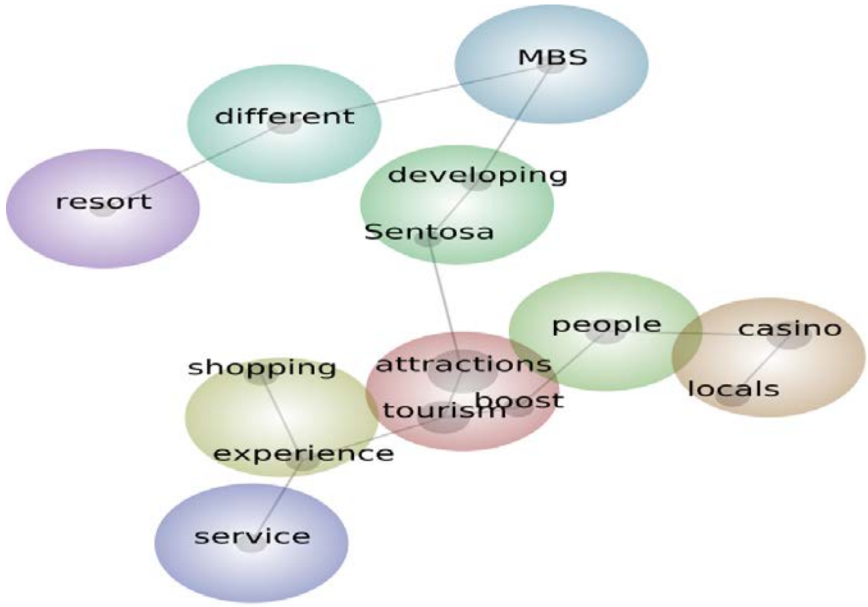


Figure 3-8: IRs matched Singapore's destination image

Appendix 3-8A

Overall			MBS			Sentosa		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Casino	16	100%	Developing	1	33%	Developing	1	33%
Attractions	13	81%	Different	1	11%	Attractions	1	8%
People	9	56%	Casino	1	6%			
Different	9	56%						
Locals	6	38%						
Service	6	38%						
Tourism	5	31%						
Shopping	3	19%						
Experience	3	19%						
Developing	3	19%						
Boost	3	19%						
Resort	3	19%						

Table 3-8A: IR matched Singapore's branding strategy

Appendix 3-9

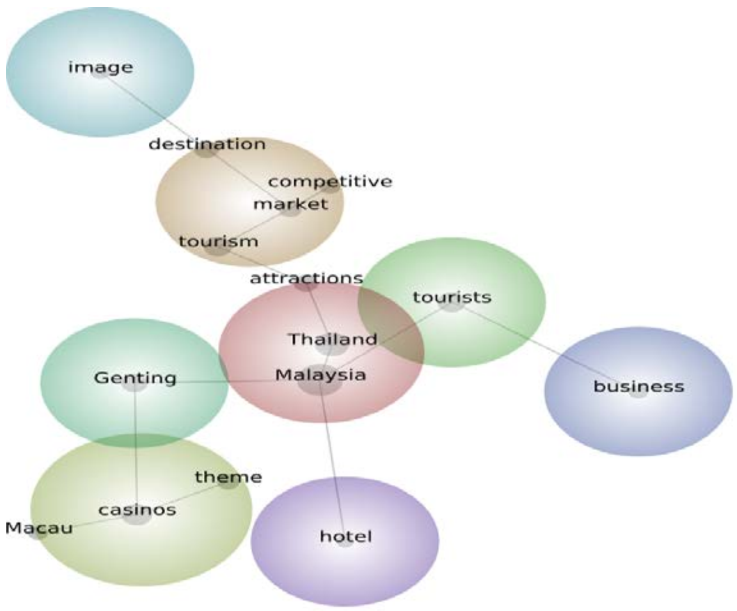


Figure 3-9A: IRs impact on Singapore's branding strategy

Appendix 3-9A

Overall			Malaysia			Thailand			Genting			Macau		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Casinos	16	84%	Market	2	40%	Destination	2	29%	Theme	2	40%	Casinos	3	19%
Tourists	14	74%	Theme	2	40%	Market	1	20%	Casinos	3	19%	Tourism	1	10%
Tourism	10	53%	Hotel	2	40%	Competitive	1	20%	Destination	1	14%	Tourists	1	7%
Business	9	47%	Attractions	2	33%	Hotel	1	20%	Image	1	14%			
Destination	7	37%	Tourism	3	30%	Attractions	1	17%	Tourism	1	10%			
Image	7	37%	Business	2	22%	Casinos	2	12%						
Attractions	6	32%	Tourists	3	21%	Business	1	11%						
Market	5	26%	Competitive	1	20%	Tourism	1	10%						
Theme	5	26%	Casinos	2	12%	Tourists	1	7%						
Competitive	5	26%												
Hotel	5	26%												

Table 3-9A: IR's impact on Singapore's branding strategy

Appendix 3-10

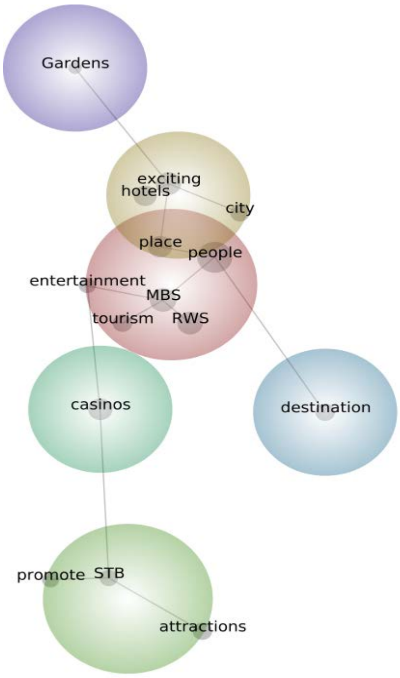


Figure 3-10: IRs enhanced Singapore's branding image

Appendix 3-10A

Overall			**MBS**			**RWS**			**STB**			**Gardens**		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
People	18	100%	Entertainment	1	33%	Exciting	1	20%	Promote	2	33%	Exciting	1	20%
Attractions	11	61%	Exciting	1	20%	Tourism	1	20%	Attractions	2	18%	Place	1	20%
Destination	10	56%	Place	1	20%	City	1	20%	Casinos	1	11%	Hotels	1	17%
Casinos	9	50%	Tourism	1	20%	People	3	17%						
Hotels	6	33%	City	1	20%	Hotels	1	17%						
Promote	6	33%	People	3	17%	Attractions	1	9%						
Exciting	5	28%	Casinos	1	11%									
Place	5	28%												
Tourism	5	28%												
City	5	28%												
Entertainment	3	17%												

Table 3-10A: IR enhancing Singapore's branding image

Appendix 3-11

Section C - Stakeholders Involvement in Planning and Implementation of the IRs

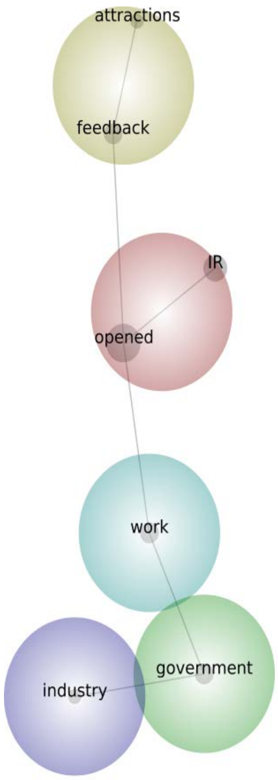


Figure 3-11: Involvement in planning and implementation of IRs

Appendix 3-11A

Overall			IRs		
Related	Count	Likelihood	Related	Count	Likelihood
Government	5	100%	Work	1	50%
Opened	3	60%	Opened	1	33%
Feedback	3	60%	Feedback	1	33%
Industry	3	60%	Attractions	1	33%
Attractions	3	60%	Government	1	20%
Work	2	40%			

Table 3-11A: Planning and Implementation of the IRs

Appendix 3-12

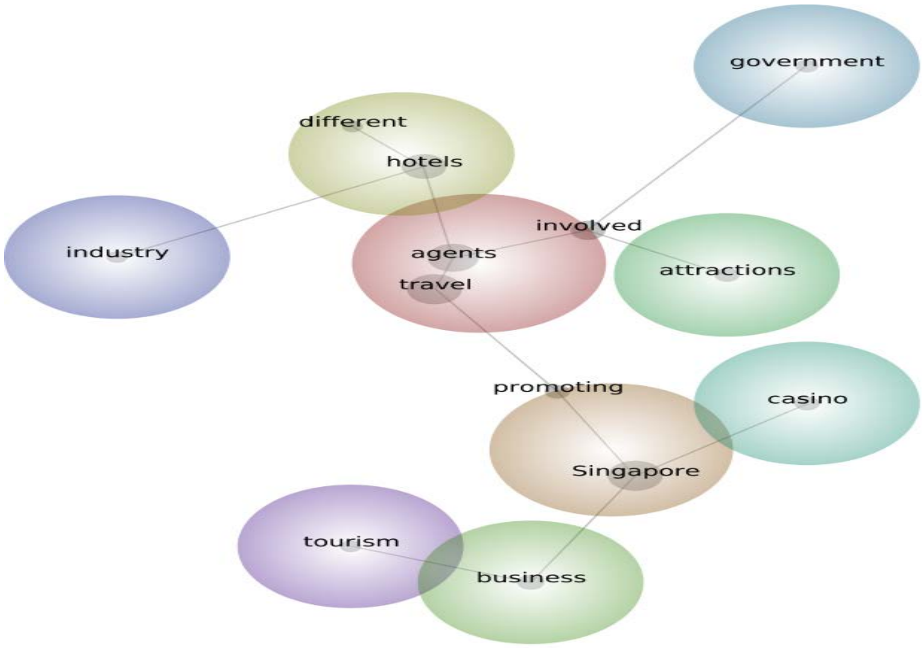


Figure 3-12: Stakeholders' contribution to planning and implementation of IRs

Appendix 3-12A

Overall			**Singapore**		
Related	Count	Likelihood	Related	Count	Likelihood
Hotels	16	67%	Business	5	50%
Government	13	54%	Promoting	3	50%
Travel	11	46%	Casino	3	33%
Attractions	11	46%	Tourism	2	25%
Business	10	42%	Agents	2	22%
Industry	10	42%	Involved	2	22%
Agents	9	38%	Travel	2	18%
Involved	9	38%	Attractions	2	18%
Casino	9	38%	Government	2	15%
Different	9	38%	Hotels	2	12%
Tourism	8	33%	Different	1	11%
Promoting	6	25%	Industry	1	10%

Table 3-12A: Stakeholders contribution to planning and implementation of IRs

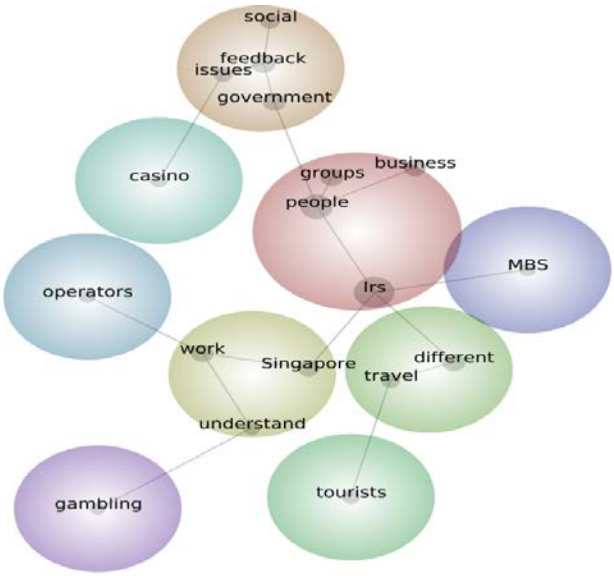


Figure 3-13: Stakeholders Involvement in planning and implementation of IRs

Appendix 3-13A

Overall			IR			Singapore			MBS		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
People	23	55%	Groups	4	80%	Work	3	27%	Groups	1	20%
Different	12	29%	Different	7	58%	Groups	1	20%	Travel	1	14%
Feedback	11	26%	Work	5	45%	Understand	1	20%	Business	1	9%
Business	11	26%	Government	4	33%	Operators	1	17%	Different	1	8%
Work	11	26%	Travel	3	43%	Different	2	17%	People	1	4%
Government	9	21%	Tourists	3	43%	Travel	1	14%			
Travel	7	17%	Gambling	2	33%	Tourists	1	14%			
Tourists	7	17%	People	7	30%	Business	1	9%			
Social	6	14%	Feedback	3	27%	People	2	9%			
Operators	6	14%	Business	3	27%						
Gambling	6	14%	Issues	1	25%						
Groups	5	12%	Casino	1	25%						
Understand	5	12%	Understand	1	20%						
Issues	4	10%	Social	1	17%						
Casino	4	10%	Operators	1	17%						

Table 3-13A: Stakeholders' involvement in planning and implementation of IRs

Appendix 3-14

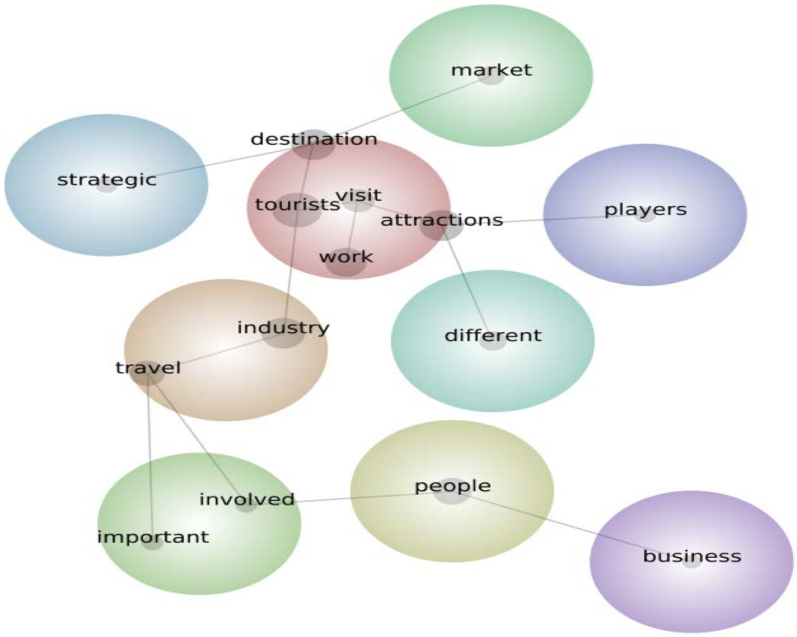


Figure 3-14: Government, STB and Tourism Partners' collaboration

Appendix 3-14A

Overall		
Related	Count	Likelihood
People	16	100%
Tourists	11	69%
Industry	10	62%
Attractions	9	56%
Travel	9	56%
Work	8	50%
Destination	7	44%
Market	6	38%
Business	6	38%
Visit	5	31%
Different	5	31%
Involved	5	31%
Important	5	31%
Players	4	25%
Strategic	4	25%

Table 3-14A: Government, STB and Tourism Partners' Collaboration

Appendix 3-15

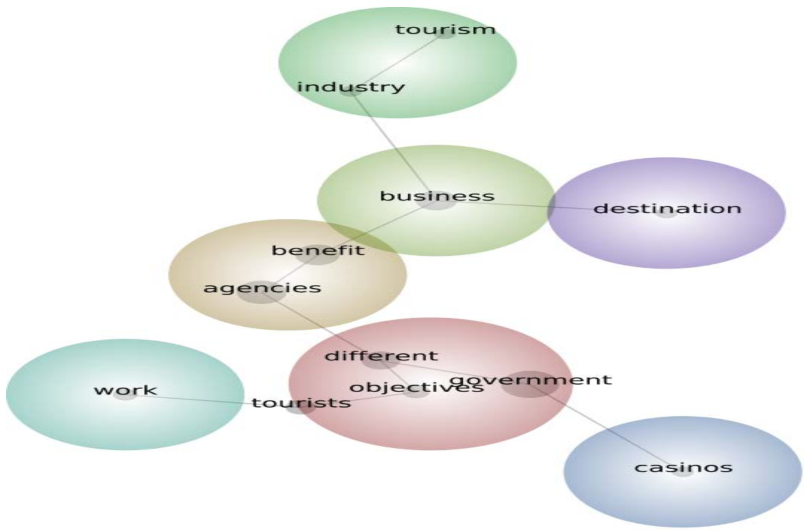


Figure 3-15: Challenges in collaboration

Appendix 3-15A

Overall		
Related	Count	Likelihood
Government	18	100%
Business	11	61%
Agencies	9	50%
Benefit	8	44%
Tourism	7	39%
Different	6	33%
Tourists	6	33%
Work	6	33%
Industry	6	33%
Casinos	6	33%
Destination	5	28%
Objectives	4	22%

Table 3-15A: Challenges in collaboration

Appendix 3-16

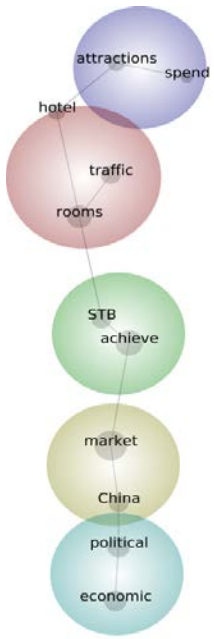


Figure 3-16: Attract 17 million visitors by 2015

Appendix 3-16A

Overall			China			STB		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Economic	14	100%	Political	1	17%	Traffic	1	20%
Market	13	93%	Market	2	15%	Rooms	1	17%
Achieve	12	86%	Achieve	1	8%	Market	2	15%
Hotel	7	50%	Economic	1	7%	Achieve	1	8%
Rooms	6	43%						
Political	6	43%						
Attractions	6	43%						
Spend	6	43%						
Traffic	5	36%						

Table 3-16A: Attract 17 million visitors by 2015

Appendix 3-17

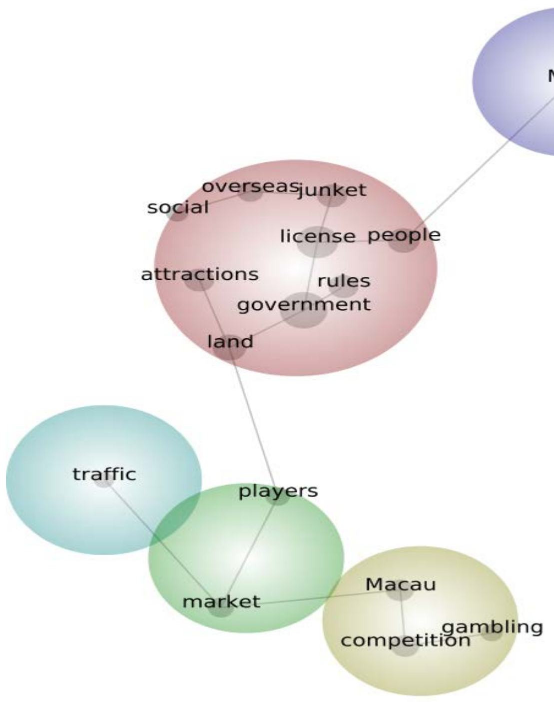


Figure 3-17: IRs after 10 years of casino license exclusiveness

Appendix 3-17A

Overall			**Macau**			**MBS**		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
Government	14	100%	Rules	1	25%	People	1	11%
Competition	12	86%	Competition	2	17%			
License	10	71%	Gambling	1	14%			
People	9	64%	Market	1	11%			
Market	9	64%	Government	1	7%			
Attractions	8	57%						
Gambling	7	50%						
Land	6	43%						
Junket	6	43%						
Players	5	36%						
Rules	4	29%						
Overseas	4	29%						
Social	4	29%						
Traffic	3	21%						

Table 3-17A: IRs after 10 years' exclusive license

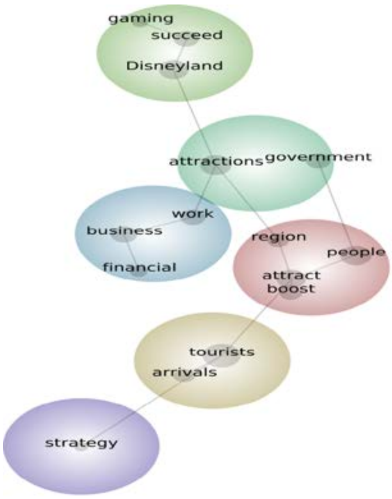


Figure 3-18: IRs crucial to Singapore's tourism industry

Appendix 3-18A

Overall		
Related	Count	Likelihood
Tourists	16	100%
People	12	75%
Attractions	10	62%
Business	7	44%
Government	7	44%
Attract	6	38%
Work	4	25%
Succeed	4	25%
Boost	4	25%
Arrivals	4	25%
Strategy	4	25%
Region	3	19%
Financial	3	19%
Gaming	3	19%

Table 3-18A: IRs crucial to Singapore's tourism industry

Appendix 3-19

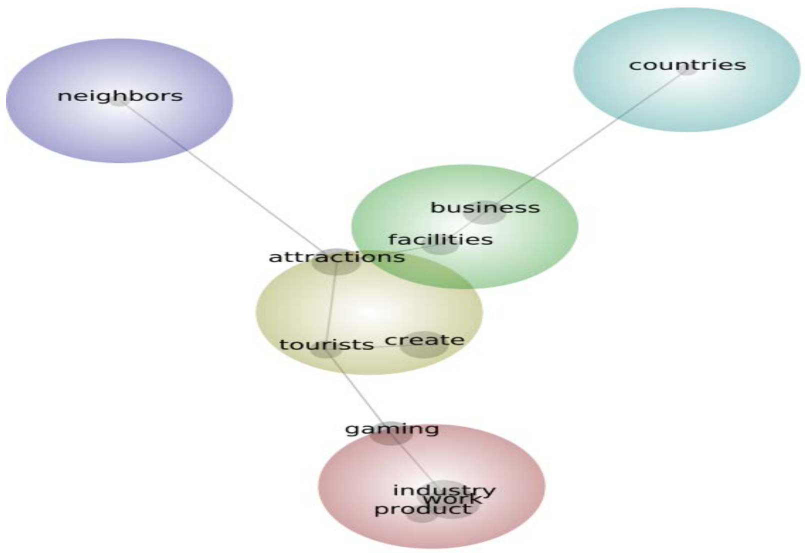


Figure 3-19: Sustainable competitive advantage of IRs

Appendix 3-19A

Overall		
Related	Count	Likelihood
Work	8	100%
Industry	7	88%
Attractions	7	88%
Countries	7	88%
Create	6	75%
Tourists	6	75%
Neighbours	5	62%
Business	4	50%
Gaming	3	38%
Facilities	3	38%
Product	3	38%

Table 3-19A: Sustainable competitive advantage of IRs

Appendix 3-20

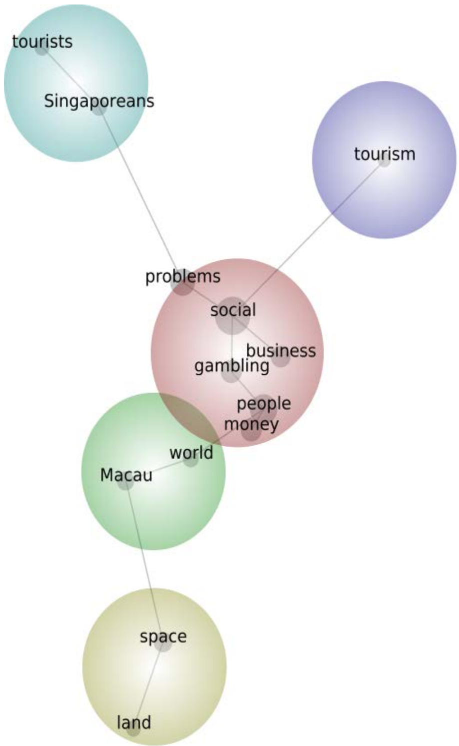


Figure 3-20: Government grant more casino licenses

Appendix 3-20A

Overall			Macau			Singaporeans		
Related	Count	Likelihood	Related	Count	Likelihood	Related	Count	Likelihood
People	18	100%	World	1	25%	Problems	1	17%
Social	16	89%	Problems	1	17%	Tourists	1	14%
Gambling	11	61%	Space	1	12%	Social	1	6%
Space	8	44%	Social	1	6%			
Money	7	39%						
Business	7	39%						
Tourists	7	39%						
Problems	6	33%						
Land	5	28%						
World	4	22%						
Tourism	4	22%						

Table 3-20A: Government grant more casino licenses

Appendix 4-0

Questionnaire for Tourists in Study 2

Good day. I am Derrick Lee, a PhD candidate at James Cook University. You are invited to take part in a research study to determine international tourists' attitudes and perceptions of Singapore as a tourism destination, and also if the Integrated Resorts-Marina Bay Sands (MBS) and Resorts World Sentosa (RWS) launched in 2010 have enhanced Singapore's appeal as a tourism destination. The study is conducted by Lee Choong Hiong, Derrick and it will contribute to the Doctor of Philosophy-Business at James Cook University, Australia. Your identity and content of the visitor survey will be kept confidential and data gathered are for academic purposes only. It should take about 20 minutes of your time. For all questions, please (√) your answers. Thank you.

Firstly, let me ask you about your thoughts on Singapore based on your current and previous visits.

Q1. Have you ever been to Singapore before?

- ○ No
- ○ Yes →☐1-5 times ☐6-10 times ☐11-15 times ☐More than 16 times

Q2. Which of the following best describes your purpose of this visit to Singapore?

- ○ Business
- ○ Education
- ○ Holiday
- ○ Visiting family/friends
- ○ Medical/Wellness/Healthcare
- ○ Attending/participating in a sporting event

Q3. Which of the following best describes the group you are visiting Singapore with?

- ○ I am visiting alone
- ○ I am visiting with spouse/partner
- ○ I am visiting with family members including _______ children aged under 18 years
- ○ I am visiting with a group of friends
- ○ I am with an organised tour or group
- ○ I am in another type of group. Please describe:

Q4. How long are you staying away from home on this trip?

- ○ Day trip
- ○ Overnight stay
- ○ 2 to 3 days
- ○ 4 to 7 days
- ○ More than 7 days

Q5. How long will you stay in Singapore on this trip?

- ○ Day trip
- ○ Overnight stay
- ○ 2 to 3 days
- ○ 4 to 7 days
- ○ More than 7 days

Q6. Are you visiting any other destinations besides Singapore on this trip?

- ○ No
- ○ Yes -> which one(s) …………………………………………………………………

Q7. Which of the following sources did you use to gather information for this visit to Singapore? **(choose the 3 most important sources)**

	To plan your trip	During your trip
Travel guide books	○	○
Travel guide publications/magazines (please indicate) 3. …………... 4. …………...	○	○
Other travellers	○	○
Friends / family members	○	○
Articles in newspapers / magazines	○	○
Travel agent or tour operator	○	○
Accommodation providers	○	○
Travel brochures / pamphlets	○	○
Visitor Information Centres	○	○
Travel Fairs, please indicate which ones and where. Eg. STB Fair/Thailand 3. …………... 4. …………...	○	○
Mobile applications, please indicate which application(s)? 3. …………... 4. …………...	○	○
Internet / websites Destination website: ……………………………………………………… Accommodation website(s): ………………………………… Other website(s): ……………………………………………….	○	○
Social media a. Facebook b. Trip Advisor c. Twitter d. Other…………………………………………………………	○ ○ ○ ○	○ ○ ○ ○

Q8. Which of the following places and attractions have you <u>visited or do you plan to visit</u> while in Singapore?

	Have visited	Plan to Visit		Have visited	Plan to Visit
Asian Civilisations Museum	○	○	Marina Bay Sands	○	○
Botanic Gardens	○	○	MBS Casino	○	○
Clarke Quay	○	○	MBS Skypark	○	○
Chinatown	○	○	Resorts World Sentosa	○	○
Gardens by the Bay	○	○	RWS Casino	○	○
Jurong Bird Park	○	○	Marine Life Park	○	○
Merlion Park	○	○	Maritime Experiential Museum	○	○
Night Safari	○	○	Universal Studios Singapore	○	○
Orchard Road	○	○	Singapore Cable Car	○	○
Zoological Garden	○	○	Sentosa Island	○	○

Q9. In your opinion, do you agree that the two Integrated Resorts (IRs) – Marina Bay Sands and Resorts World Sentosa have made Singapore a more appealing holiday destination?

○Strongly agree ○Agree ○Somewhat disagree ○No difference ○Somewhat disagree ○ Disagree ○Strongly disagree

Q10. In your opinion, are the two IRs - Marina Bay Sands and Resorts World Sentosa **consistent** with your expectations of the Singapore tourism experience?

O Exceed expectations	O Meet expectations	O Somewhat meet expectations	O Not sure	O Somewhat do not meet expectations	O Do not meet expectations	O Well below my expectations

Q11. Overall how **satisfied** are you with your experience in *Singapore*?

OVery satisfied	O Satisfied	O Somewhat satisfied	O Neutral	O Somewhat dissatisfied	O Dissatisfied	O Very dissatisfied

Q12. How likely are you to recommend visiting *Singapore* to others?

O Very likely	O Likely	O Somewhat likely	O Not sure	O Somewhat unlikely	O Unlikely	O Very unlikely

Q13. Would you visit Singapore again?

O Yes, within the next 12 months	O Yes, within the next 5 years	O Yes, not sure when	O Not sure	O No

Q14. Use the space below to tell us the two **best** things about your visit to *Singapore*

1. ....
2. ....

Q15. List two things about *Singapore* which could be **improved.**

1. ....
2. ....

Q16. Please rate the attractiveness Singapore as a tourism destination on each of the following.

Attributes	**Not at all attractive**				**Very attractive**
Quality and appeal of attractions	○	○	○	○	○
Many attractions to visit	○	○	○	○	○
Convenience access to attractions	○	○	○	○	○
Political stability	○	○	○	○	○
Safety and security	○	○	○	○	○
Urban landscape	○	○	○	○	○
Natural scenic beauty	○	○	○	○	○
Pleasant and attractive weather	○	○	○	○	○
Exotic atmosphere	○	○	○	○	○
Clean and litter free environment	○	○	○	○	○
Pleasant surroundings	○	○	○	○	○
Many people speaking English	○	○	○	○	○
Friendly local people	○	○	○	○	○
Restful and relaxing	○	○	○	○	○
Unique architecture	○	○	○	○	○
Ease of accessibility as a transit city	○	○	○	○	○
Rich cultural heritage	○	○	○	○	○
Local festivals and shows	○	○	○	○	○
Exciting things to do	○	○	○	○	○
Opportunity for adventure	○	○	○	○	○
Appealing family-oriented activities	○	○	○	○	○
High roller clubs	○	○	○	○	○
Complimentary casino services	○	○	○	○	○
Casino promotions/discounts	○	○	○	○	○
Good customer service	○	○	○	○	○
Good nightlife	○	○	○	○	○
Good quality restaurants	○	○	○	○	○
Unique cuisine	○	○	○	○	○
Museums and art galleries	○	○	○	○	○
Good beaches	○	○	○	○	○
Appealing group tour packages	○	○	○	○	○
Value for money	○	○	○	○	○
Availability of tourist information	○	○	○	○	○
Good quality hotels	○	○	○	○	○
Affordable room rates	○	○	○	○	○
Excellent medical facilities	○	○	○	○	○

Opportunities for shopping	○	○	○	○	○
Wide variety of products for shoppers	○	○	○	○	○
Place to undertake study/education	○	○	○	○	○
Place to do business	○	○	○	○	○
Place to do meetings/exhibitions	○	○	○	○	○
Place of religious celebrations/pilgrimage	○	○	○	○	○
A place to recommend to family/friends/associates	○	○	○	○	○

Q17. Please rate how attractive each of the following destinations is to you in terms of your ideal travel choice as compared to visiting Singapore:

Destinations	**Much less attractive than Singapore**	**Less attractive than Singapore**	**About the same level of attractiveness as Singapore**	**More attractive than Singapore**	**Much more attractive than Singapore**	**Don't know/ unsure**
Auckland (New Zealand)	○	○	○	○	○	○
Bali (Indonesia)	○	○	○	○	○	○
Bangkok (Thailand)	○	○	○	○	○	○
Dubai (United Arab Emirates)	○	○	○	○	○	○
Genting Highlands (Malaysia)	○	○	○	○	○	○
Hanoi (Vietnam)	○	○	○	○	○	○
Ho Chi Minh City (Vietnam)	○	○	○	○	○	○
Hong Kong (China)	○	○	○	○	○	○
Jakarta (Indonesia)	○	○	○	○	○	○
Johor Bahru (Malaysia)	○	○	○	○	○	○
Macau (China)	○	○	○	○	○	○
Manila (Philippines)	○	○	○	○	○	○
Melbourne (Australia)	○	○	○	○	○	○
Mumbai (India)	○	○	○	○	○	○
Penang (Malaysia)	○	○	○	○	○	○
Phnom Penh (Cambodia)	○	○	○	○	○	○
Seoul (South Korea)	○	○	○	○	○	○
Sydney (Australia)	○	○	○	○	○	○
Taipei (Taiwan)	○	○	○	○	○	○
Tokyo (Japan)	○	○	○	○	○	○

Q18. Now let's compare Singapore in more detail to these other destinations. In the first row of the table, please write where indicated the names of the **three destinations** from the previous list that you find most attractive or appealing. Next please **choose 3 words** from the list provided which best match your image of Singapore and each of the other destinations you identified, by filling in the appropriate circle.

Words	**Singapore**	Appealing destination 1 --------------------------	Appealing destination 2 --------------------------	Appealing destination 3 --------------------------
Affordable	○	○	○	○
Amazing	○	○	○	○
Creative	○	○	○	○
Cheerful	○	○	○	○
Cosmopolitan	○	○	○	○
Cultural	○	○	○	○
Charming	○	○	○	○
Daring	○	○	○	○
Discovery	○	○	○	○
Exotic	○	○	○	○
Exciting	○	○	○	○
Friendly	○	○	○	○
Fantasy	○	○	○	○
Fun	○	○	○	○
Imaginative	○	○	○	○
Incredible	○	○	○	○
Inspiring	○	○	○	○
Modern	○	○	○	○
Paradise	○	○	○	○
Pure	○	○	○	○
Scenic	○	○	○	○
Sincere	○	○	○	○
Sophisticated	○	○	○	○
Spectacular	○	○	○	○
Spirited	○	○	○	○
Unique	○	○	○	○
Warm	○	○	○	○
Welcoming	○	○	○	○

Q19. Looking forward to tourism in Singapore in 2025:
Singapore has the potential to pursue different future directions – cultural, gastronomy, leisure, education, medical or sports tourism. Please provide feedback on the following two scenarios (A-F).

Scenario A – Singapore: The Garden – sustainable urban living

The new Gardens by the Bay transformed Singapore to be more than a city in the garden in 2012. In 2025, Singapore aims to become one of the most liveable cities in Asia. To be a thriving economy, Singapore is promoting a sustainable development strategy by minimizing the impact of growth on the environment and the efficient usage of resources. In 2025 you can:

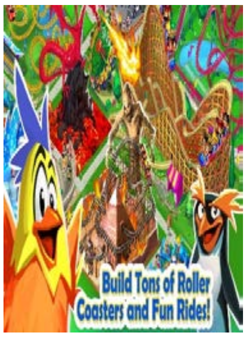
- be visiting the new 360-hectare Jurong Lake District comprising waterfront hotels, parks and playgrounds, shopping mall, and an integrated health hub for everyone
- be enjoying a 20km cycling trail around eight parks in western Singapore and viewing 550 species of trees and 50 species of birds
- be experiencing a greener and environmentally-friendly Singapore with recreational activities in the reservoirs and waterways, cooler high-rise buildings, more recycling campaigns and larger green space

	Not at all				Very
Overall how appealing is this future vision of Singapore to you?	○	○	○	○	○
How likely is it that this future vision would attract you to visit Singapore?	○	○	○	○	○
How likely is it that this future vision would make you stay longer in Singapore?	○	○	○	○	○

Scenario B – Singapore: Family-oriented wonderland

In 2025, Singapore needs to innovate with newer theme parks offering exciting rides to attract tourists to visit the city instead of other destinations such as China, Malaysia and South Korea who are developing newer theme parks including Hello Kitty, Legoland and Disneyland. In order to remain competitive, Singapore should develop new, and also upgrade current, theme parks to appeal to tourists:

- Universal Studios Singapore introduces newer movie-themed rides to continue to attract visitors
- Adventure Cove Waterpark and Wild Wild Wet introduce newer and thrilling slides for visitors
- Animal theme parks exhibit exotic species, and offer new animal shows and white water rafting for visitors



	Not at all				Very
Overall how appealing is this future vision of Singapore to you?	○	○	○	○	○
How likely is it that this future vision would attract you to visit Singapore?	○	○	○	○	○
How likely is it that this future vision would make you stay longer in Singapore?	○	○	○	○	○

Scenario C – Singapore: Melting Pot of Asia – A Hybrid of Asian Culture

In 2025, Singapore will be a leading multi-cultural hub of Asia with its unique society of different races living in harmony. Tourists will be fascinated with the rich and multicultural aspects of the Chinese, Indians, Malays and Eurasians who settled in Singapore a unique multicultural society. Tourists do not need to go further than Singapore to experience:

- unique cuisines from four ethnic backgrounds including; chicken rice, nasi goreng, chicken masala in every corner in the city
- multi-cultural heritage trails in Jurong Lake District, and Pulau Ubin so visitors can appreciate the contributions of the early immigrants to what Singapore is today
- tours of Peranakan Museum, old 1920s shophouses and tasting Peranakan delicacies

	Not at all				**Very**
Overall how appealing is this future vision of Singapore to you?	○	○	○	○	○
How likely is it that this future vision would attract you to visit Singapore?	○	○	○	○	○
How likely is it that this future vision would make you stay longer in Singapore?	○	○	○	○	○

Scenario D – Singapore: Vibrant Tropical City

In 2025, Singapore will be a leading city in the tropics with its strategic location in the heart of Asia. It boasts modern infrastructure, architecture, pristine rainforest and sandy beaches. It offers a variety of food and culture and a cosmopolitan society where a lively local culture mixes with influences from all over the globe. The night life is exciting with quality nightspots and offers quality life music scene. High-end tourists will be entertained with quality hotels, luxury shopping and dining experiences. Budget travellers can choose economy hotels, dine at local eateries and shop at heartland malls. Tourists will see that:

- Singapore is a leading aviation hub with five airport terminals to welcome 135 million visitors annually, extensive airlines network, first-class shopping and retail experience
- there are 60,000 hotel rooms in all categories, an increase of 50% based on current capacity to welcome 20 million international visitors
- the two Integrated Resorts (IRs) have upgraded their state of art facilities and casino licenses are extended to 2030, enabling them to be the world's leading IRs

	Not at all				**Very**
Overall how appealing is this future vision of Singapore to you?	○	○	○	○	○
How likely is it that this future vision would attract you to visit Singapore?	○	○	○	○	○
How likely is it that this future vision would make you stay longer in Singapore?	○	○	○	○	○

Scenario E – Singapore: medical and wellness tourism - healthcare hub of Asia Pacific

Singapore is Asia's leading medical hub providing internationally accredited healthcare for patients and attracting medical tourists from various countries across the globe. Tourists can be assured of high quality standards in health care services supported by the latest infrastructure at affordable costs compared to developed nations in Europe and South East Asia. Singapore is home to some of Asia's leading Joint Commission International (JCI) accredited and ISO 9001:2000 certified hospitals. It has an efficient system as well, with WHO rankings placing it 6th position in terms of healthcare benefits and infrastructure. Tourists can expect:

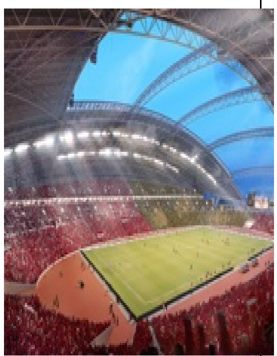
- complete healthcare eco-system and quality treatment at competitive costs
- To be offered a range of medical care from wellness services to high-end specialist care in cardiology, obstetrics and gynaecology, oncology, neurology and, pediatric
- receive quality healthcare services along with enjoyable tourism experiences as Singapore offers exciting attractions, vibrant nightlife, fine dining and shopping malls

	Not at all				Very
Overall how appealing is this future vision of Singapore to you?	○	○	○	○	○
How likely is it that this future vision would attract you to visit Singapore?	○	○	○	○	○
How likely is it that this future vision would make you stay longer in Singapore?	○	○	○	○	○

Scenario F – Singapore: Sporting Hub of Asia Pacific

In 2014, the Singapore Sports Hub will be a destination built for locals to watch, play and support world-class sports and entertainment events. It will be a sports, lifestyle and entertainment ecosystem that will host multiple events all year round. It features a 55,000-seat National Stadium, a 6,000-seat Aquatics Centre and Leisure Water facility, 41,000 sqm (441,000 sqft) of commercial retail space. Tourists and locals can expect Singapore to host:

- world-class events in All-England (badminton), ITTF (table-tennis), Australian Open (tennis), INF (netball), NBA (basketball)
- Olympic Games, Commonwealth Games, Asian Games, and Southeast Asian Games
- World Cup, Confederations Cup, Asian Cup, Manchester United and Real Madrid



	Not at all				Very
Overall how appealing is this future vision of Singapore to you?	○	○	○	○	○
How likely is it that this future vision would attract you to visit Singapore?	○	○	○	○	○
How likely is it that this future vision would make you stay longer in Singapore?	○	○	○	○	○

Personal Profile

Q20. Which **one** of the following statements **best** describes you:

- ○ To visit casinos is the **main reason** I travel
- ○ To visit casinos plays an **important part** in my travel decisions
- ○ To visit casinos are **not a major part** of my travel decisions but I **enjoy** gambling when on holiday
- ○ I'm **not interested** in visiting casinos while on holidays
- ○ I **avoid** visiting casinos while on holidays

Q21. When at home, how many times **a month** do you gamble? For example, visiting casinos, playing slot machines, betting on sport/horse races, betting online or with agents?

- ○ Never
- ○ Once per month
- ○ 2 to 4 times per month
- ○ More than 4 times per month

Q22. Please tell us, are you:

- ○ Female
- ○ Male

Q23. In what year were you born? …………………………………

Q24. In which country do you usually live?...
According to your passport what is your nationality? ……………………………………………….

Q25. What is your Occupation?

○ Administrative/managerial	○ Production and transport
○ Professional	○ Homemaker
○ Technical	○ Retiree
○ Sales and Service	○ Students
○ Clerical	○ Other ……………………………………………….

Q26. Please tell us what your Annual Household Income is in US dollars

○ Up to US$40,000
○ US$40,001-US$60,000
○ US$60,001-US$80,000
○ US$80,001-US$100,000
○ More than US$100,000

Q27. What is the highest level of education you have attained?

○ Primary School
○ High School/College
○ Bachelor's degree
○ Postgraduate

Appendix 3

Appendix 5-0

Questionnaire Justification Table in Study 3 Focus Group Research

Blocks of Questions	Literature	Possible links	Methodology
Impact of gambling on Singaporean families	Mathews and Volberg (2012)	Social evil	In-depth interviews (Qualitative research)
Residents' perception of gaming impacts	Vong and McCartney (2005)	Economic, social and environmental impacts	Likert-type scale (Quantitative research) Incorporate in open-ended questions (qualitative)
Changes in Residents' Gambling Attitudes and Perceived Impacts	Vong (2009)	Negative impact on environment and cost of living	Likert-type scale (Quantitative research) Incorporate in open-ended questions (qualitative)
Social impacts of casino gambling	Wan, Li and Weng (2011)	Positive impacts lag behind negative impacts	Secondary data research
Social costs and tax effects of casino tourism	Gu, Li and Pui (2013)	Importance of casino taxation	Secondary data research
Community attitudes toward legalized gambling	Smith, Schopflocher, el-Guebaly, Casey, Hodgins, Williams and Wood (2011)	Local residents attitudes towards casinos	Open-ended questions (Qualitative research)
Measures by government to curb costs of casino gambling	Henderson (2012)	Effective deterrent measures	Open-ended questions (Qualitative research)
Social capital index and Quality of Life	Griswold, M.T. and Nichols, M.W. (2006)	Quality of Life	Open-ended questions (Qualitative research)

Strategy in Focus group questions

Topic	Questions	Approach
Local residents perception of IRs	Q1) Since 2010, our tourist arrivals registered constant increase by as much as 20 percent. What are the reasons we have more tourists visiting Singapore?	Picture (International tourists)
	Answer a-When a participant mentioned ‘attractions’, I ask ‘Which attraction in Singapore is most appealing to tourists?’ Answer b-When a participant mentioned ‘casinos’, I ask ‘Do you think casino tourism makes Singapore an exciting and appealing destination to tourists?’	Picture (Attractions) Picture (Casinos)
	Q2) Six potential future scenarios for tourism in Singapore used in Study 2 will be presented to participants S1-Singapore the Garden City–sustainable urban living S2-Singapore–Family Oriented Wonderland S3-Singapore–Melting Pot of Asia-A Hybrid of Asian Culture S4-Singapore–Vibrant Tropical City S5-Singapore–Medical and Wellness Tourism-healthcare hub of Asia Pacific S6-Singapore–the Sporting Hub of Asia A discussion will be generated around the perceived attractiveness of each of these alternatives and the likely impacts of each on the wellbeing of Singaporean residents.	Scenario-based questions
	Q3) According to hotel.com survey (The Chinese International Monitor), the three most important factors encouraging Chinese tourists to visit Singapore are safety (43%), historical and heritage sites (39%), value-for-money (30%). Do you think there are other factors attracting Chinese tourists to Singapore?	Article-My Paper, 22 Aug 2013, ‘Singapore is top Asian pick for China tourists’
	Q4) Do you think the Integrated Resorts is an effective tourism strategy for Singapore?	2 Articles (a) The Straits Times, 18 Oct 2011, ‘IRs lauded for promoting tourism’. (b) Reuters, 24 Sep 2013, ‘Singapore casinos trump Macau with tourism aces’

Benefits versus costs of casino gambling	Q5) Tell us a story of how the introduction of the IR's has impacted or changed the way of life of you or someone in your social group. Wagner et al (1999) Theory and Method of Social Representations	Narratives as a tool for identifying social representations of gambling
	A very powerful anti-gambling ad http://www.youtube.com/watch?v=V2VdHELuR6g (1 min)	Video clip
	Q6) What are the benefits and costs of promoting Singapore as a casino tourism destination?	In-depth discussion around Chhabra and Gursoy's GTSM
	Social capital: A Love story (5min) http://www.youtube.com/watch?v=alTG_c5LLak (5 min)	Video clip
	Q7) Do you think the IRs have improved social capital or enhance quality of life in a community? Spellberger (2001)'s 6 categories-Trust, Civic Engagement, Participation, Voluntary Activity, Giving, and Meeting obligations	In-depth discussion on Putnam (2000) social capital index
	Q8) Do you think the casinos will continue to attract visitors to Singapore?	Article-CNBC, 10 Jan 2013, 'Singapore's casinos slow, will the economy suffer?'
Measures by government	Government plans more problem-gambling safeguards http://www.youtube.com/watch?v=11O5Ow78P0g (3 min)	Video clip
	Q9) Do you think the levy imposed by government of $100 (per visit) or $2,000 (annual) is effective to deter local residents from visiting the casinos?	
	Q10) Do you think the voluntary exclusion order, be it self, family or third party is an effective safeguard measure to deter addictive gambling?	Article-The Straits Times, 24 Nov 2012, 'Call to protect vs freedom of choice'
	Q11) What other measures can you suggest that will make Singapore enjoy economic success and curb social evils of casino gambling?	
	Q12) Have you participated in remote gambling (soccer bets, horse bets)?	
	Q13) Do you think that our Singapore government should ban remote gambling? Singapore to restrict remote gambling activities http://www.youtube.com/watch?v=ej7KLmGIEfQ (5 min)	Article-The Diplomat, 29 Nov 2013, 'Singapore considers a ban on remote gambling' Videoclip
Demographic profile	Demographics (Appendix 1)	Complete questionnaire

Appendix 5-2

Questionnaire for Local Residents in Study 3

Personal Profile

Name of participant: ____

Q1. Please tell us, are you
○ Singapore citizen
○ Permanent resident

Q2. Please tell us, are you
○ Male
○ Female

Q3.Please tell us what is your age group?

○ Below 21	○ 41-50
○ 21-30	○ 51-60
○ 31-40	○ Above 60

Q4. Please tell us, are you

○ Single	○ Married with no children
○ Divorced/Separated/Widowed	○ Married with children ______________ (specify)

Q5. Please tell us what is your ethnic group?

○ Chinese	○ Indian
○ Malay	○ Eurasian

Q6. Please tell us what is your religion?

○ Buddhism	○ Muslim
○ Catholic	○ Protestant
○ Hinduism	○ Other

____

Q7. What is your Occupation?

○ Senior management	○ Student
○ Professional	○ Homemaker
○ Sales/Marketing	○ Retiree
○ Self-employed	○ Other ___________________

Q8. Please tell us your Annual Household Income in Singapore dollars

○ Up to S$40,000	○ S$80001 – S$100,000
○ S$40,001- S$60,000	○ More than S$100,000
○ S$60,001- S$80,000	

9. What is the highest level of education you have attained?

○ PSLE	○ Polytechnic Diploma
○ GCE 'O' level/ITE	○ University
○ GCE 'A' level	○ Professional Qualification ______________ (specify)

Please tick (_/) your answer. Thank you very much for your participation.

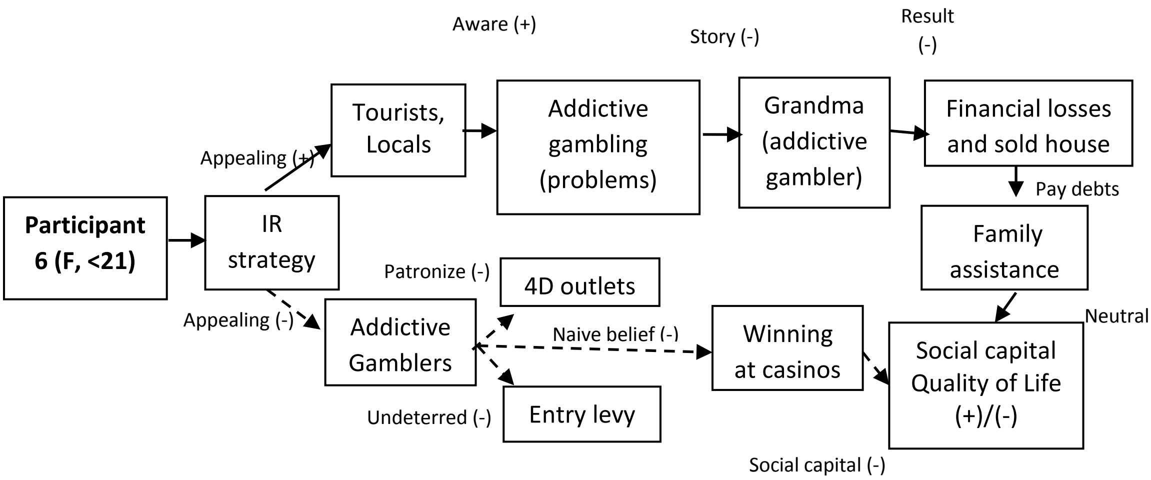


Fig.23-Mapping of Participant's 6 social representations

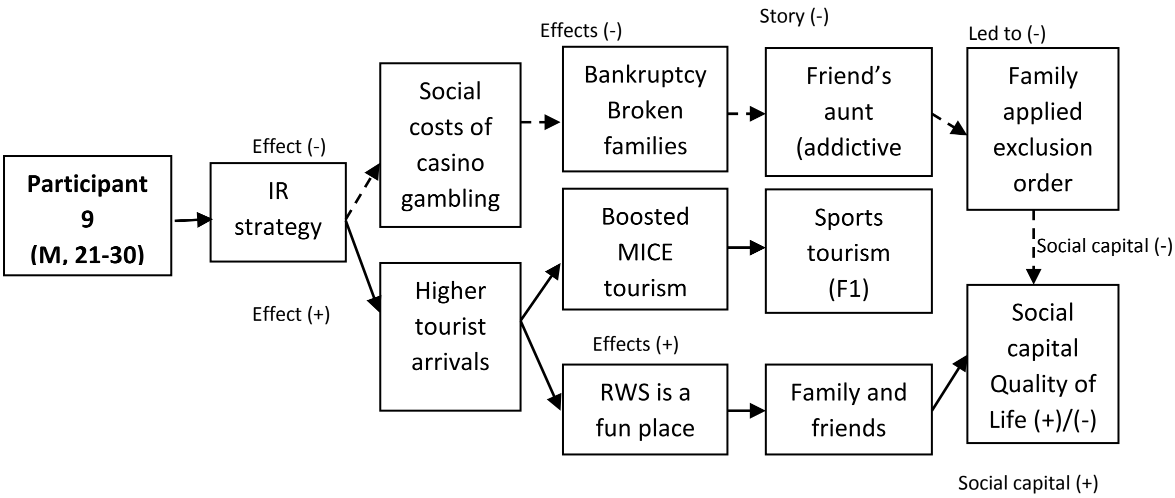


Fig.24-Mapping of Participant's 9 social representations

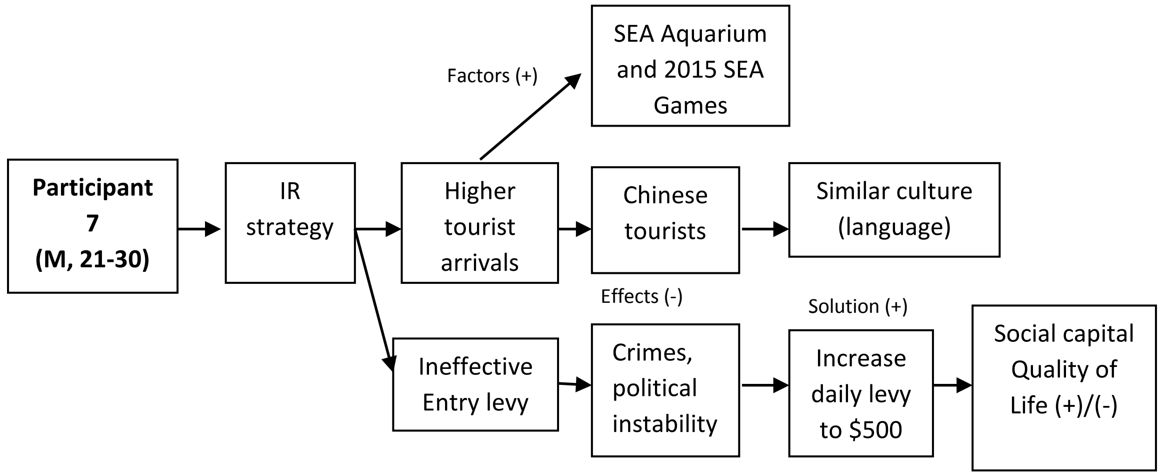


Fig. 25-Mapping of participant 7's social representations

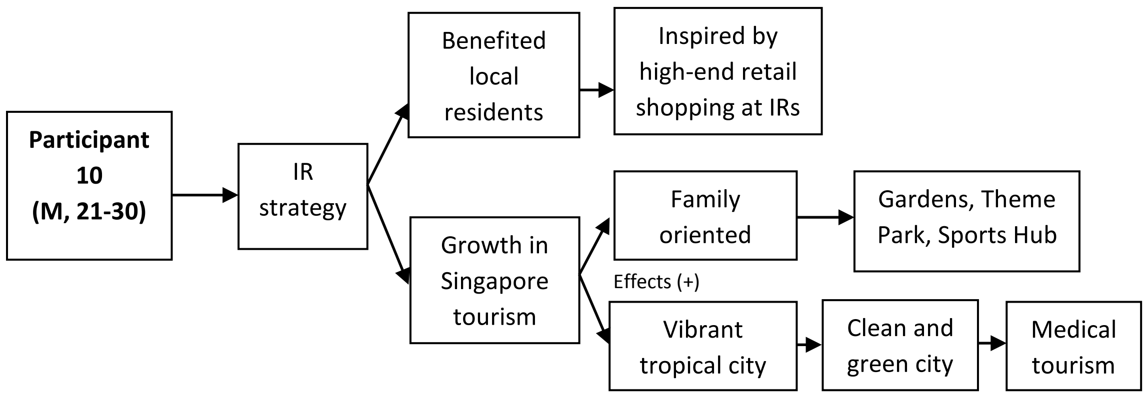


Fig. 26-mapping of participant 10's social representations

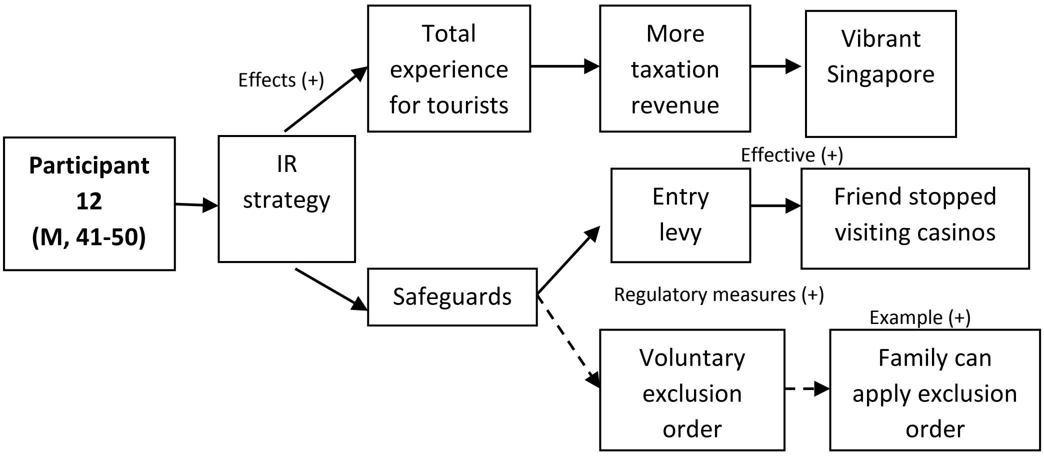


Fig. 27-mapping of participant 12's social representations

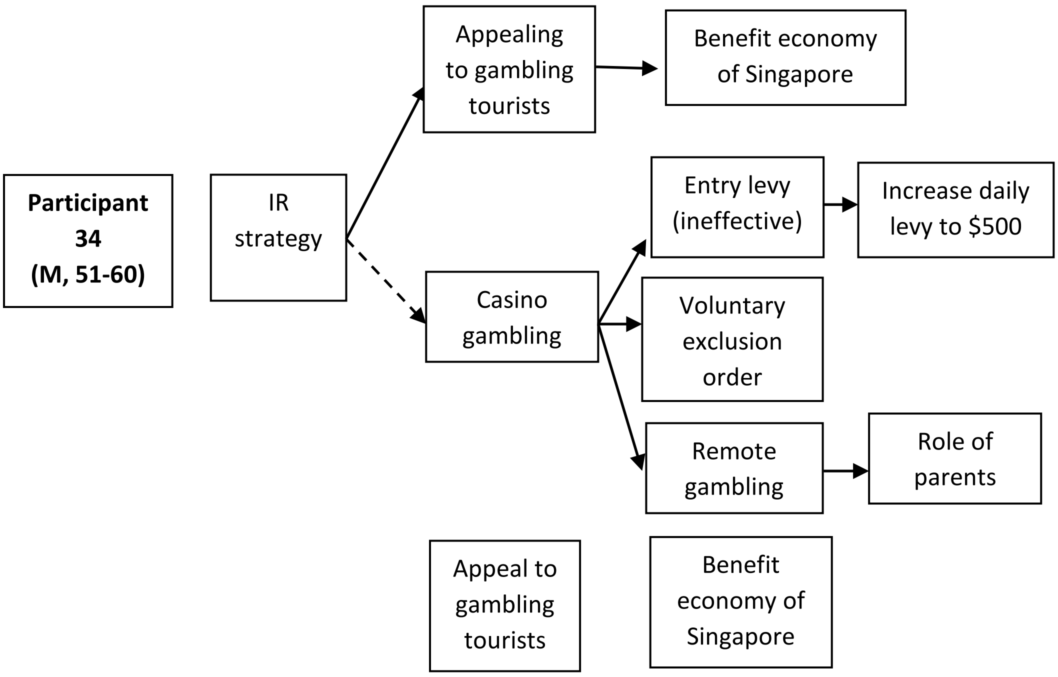


Fig. 28-mapping of participant 34's social representations